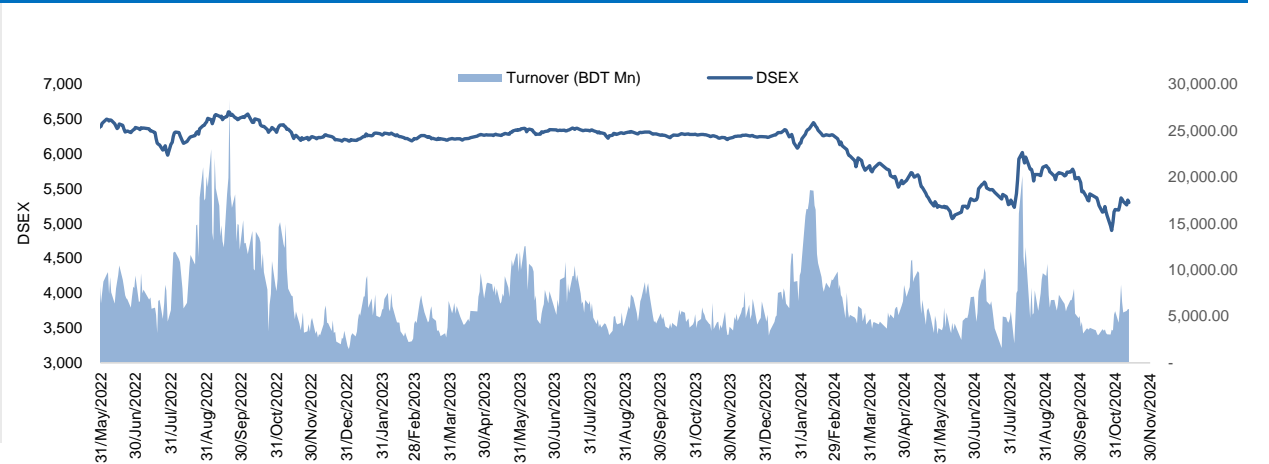


**Daily Market Update**

The market closed in red today. The benchmark index DSEX (-0.66%) lost 35.06 points and closed at 5,298.37. The blue-chip index DS30 (-0.37%), the Shariah-based index DSES (-1.03%), and the large-cap index CDSET (-0.73%) closed at 1,970.10, 1,183.00, and 1,089.84 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.79%, followed by Telecommunication (+0.52%), Fuel & Power (+0.07%), Pharmaceutical (-0.08%), Bank (-1.61%), NBFI (-1.61%), and Engineering (-2.10%), respectively. Block trades contributed 5.6% of the overall market turnover. Meghna Petroleum Limited (+1.6%) was the most traded share with a turnover of BDT 256 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,298.37	5,333.42	-35.06	-0.66%	-15.2%
DS30	1,970.10	1,977.45	-7.35	-0.37%	-5.9%
DSES	1,183.00	1,195.29	-12.29	-1.03%	-13.3%
CDSET	1,089.84	1,097.84	-8.00	-0.73%	-9.4%

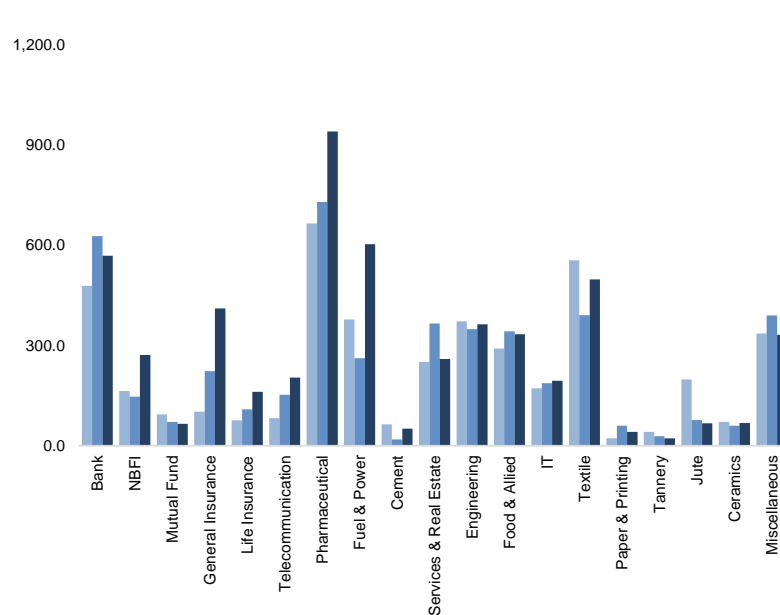
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	136	216	48	400
<b>A Category (Equity)</b>	96	110	27	233
<b>B Category (Equity)</b>	17	60	5	82
<b>N Category (Equity)</b>	1	3	0	4
<b>Z Category (Equity)</b>	22	43	16	81
<b>Mutual Funds</b>	9	14	14	37
<b>Corporate Bonds</b>	0	1	1	2
<b>Treasury Bonds</b>	0	3	0	3

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,720,024	6,709,512	+0.2%
Mn USD	56,000	55,913	
<b>Turnover</b>			
Mn BDT	5,777	5,766	+0.2%
Mn USD	48	48	
<b>Volume</b>			
Mn Shares	172	181	-5.2%
<b>No. of Trade</b>	177,398	155,085	+14.4%

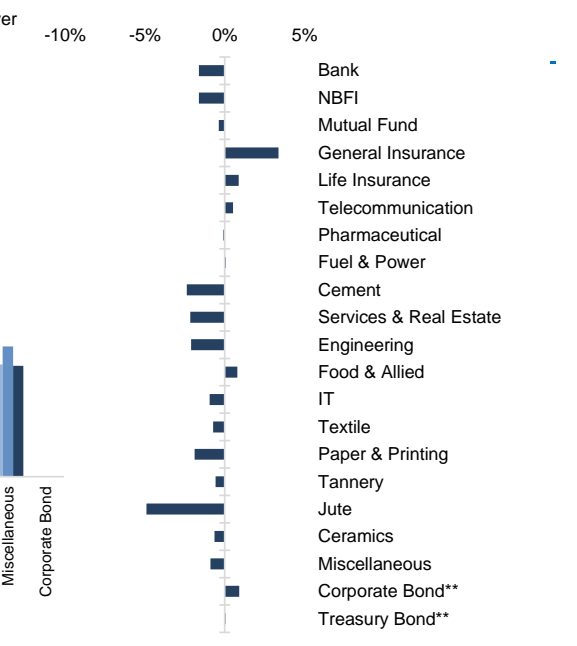
\* Based on Traded Scrips

<b>Fahim Hassan</b> Research Analyst (891) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (891) 1708915202 mistiaz.uddin@bracepl.com
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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



**Market PE** 15.2x  
**Market PB** 1.2x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,470	1,494	-24.08	-1.61%	36	695,574	10.4%	568.2	10.4%	8.9x	0.7x	GP	443,979	12.1%	143.5	12.5x	7.7x
NBFI	1,270	1,291	-20.82	-1.61%	23	121,063	1.8%	271.7	5.0%	NM	NM	BATBC	204,390	5.6%	44.3	11.6x	3.3x
Mutual Fund	614	616	-2.27	-0.37%	37	28,206	0.4%	65.9	1.2%	NM	0.5x	SQRPHARMA	198,565	5.4%	239.6	9.5x	1.6x
General Insurance	2,791	2,700	+91.02	+3.37%	43	79,679	1.2%	410.1	7.5%	14.4x	1.2x	WALTONHIL	149,768	4.1%	23.1	11.5x	1.3x
Life Insurance	1,930	1,913	+16.75	+0.88%	15	51,319	0.8%	161.6	3.0%	NM	NM	ROBI	139,329	3.8%	50.5	25.3x	2.1x
Telecommunication	5,163	5,136	+26.48	+0.52%	3	605,378	9.0%	203.9	3.7%	14.3x	4.3x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,013	3,015	-2.31	-0.08%	34	571,155	8.5%	939.1	17.2%	14.1x	1.6x	ISLAMIBANK	92,574	2.5%	175.4	19.8x	1.3x
Fuel & Power	1,147	1,146	+0.82	+0.07%	23	303,644	4.5%	603.0	11.1%	15.7x	0.6x	BRACBANK	89,547	2.4%	59.6	8.1x	1.2x
Cement	2,018	2,067	-49.10	-2.38%	7	96,155	1.4%	51.1	0.9%	16.7x	2.1x	BERGERPBL	82,107	2.2%	0.1	24.7x	5.2x
Services & Real Estate	1,124	1,149	-24.75	-2.15%	9	61,822	0.9%	259.4	4.8%	21.3x	0.4x	RENATA	76,296	2.1%	5.5	21.1x	2.3x
Engineering	2,531	2,586	-54.20	-2.10%	42	285,553	4.3%	362.8	6.7%	13.1x	0.9x	MARICO	73,398	2.0%	1.3	13.8x	9.6x
Food & Allied	17,484	17,347	+137.14	+0.79%	21	319,905	4.8%	333.4	6.1%	17.1x	4.6x	LHB	63,411	1.7%	32.6	15.7x	3.1x
IT	2,058	2,078	-19.53	-0.94%	11	27,148	0.4%	194.2	3.6%	18.8x	1.8x	ICB	56,198	1.5%	27.6	NM	1.3x
Textile	1,108	1,116	-8.13	-0.73%	58	114,991	1.7%	497.5	9.1%	NM	0.8x	UNILEVERCL	50,811	1.4%	0.2	69.1x	21.6x
Paper & Printing	4,241	4,323	-81.60	-1.89%	6	19,161	0.3%	41.7	0.8%	35.8x	0.8x	DUTCHBANGL	41,305	1.1%	7.6	6.6x	0.8x
Tannery	1,983	1,994	-11.51	-0.58%	6	22,091	0.3%	22.4	0.4%	61.6x	1.6x	BXPHERMA	38,366	1.0%	139.7	6.5x	0.8x
Jute	16,320	17,162	-841.89	-4.91%	3	3,592	0.1%	67.3	1.2%	NM	NM	POWERGRID	36,826	1.0%	2.4	NM	0.2x
Ceramics	367	370	-2.34	-0.63%	5	16,477	0.2%	67.9	1.2%	NM	1.0x	EBL	32,595	0.9%	14.1	5.0x	0.7x
Miscellaneous	4,221	4,259	-38.24	-0.90%	15	229,226	3.4%	331.5	6.1%	38.0x	1.7x	MJLBD	31,485	0.9%	174.5	11.4x	2.1x
Corporate Bond**	10,773	10,676	+97.21	+0.91%	16	34,735	0.5%	0.3	0.0%	NM	NM	PUBALIBANK	31,119	0.8%	3.9	3.2x	0.6x
Treasury Bond**	450	450	+0.26	+0.06%	236	3,005,807	44.9%	0.4	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	105.9	+10.0%	1.7	NM	NM
ZEALBANGLA	93.2	+9.9%	0.4	NM	NM
BGIC	35.0	+9.7%	4.6	29.7x	1.8x
MERCINS	24.9	+9.7%	1.8	31.1x	1.3x
MEGHNAINS	23.7	+9.2%	14.2	20.4x	1.7x
ASIAINS	28.6	+8.75%	10.9	29.5x	1.0x
GHCL	27.8	+8.6%	54.4	NM	1x
PARAMOUNT	40.6	+7.7%	26.1	16.4x	1.5x
PROVATIINS	31.1	+7.2%	15.3	21.3x	1.4x
RUNNERAUTO	33.5	+7.0%	21.9	NM	0.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	117,112	8.6%	9.5x	1.6x
BEXIMCO	69,460	5.1%	NM	1.2x
BATBC	45,948	3.4%	11.6x	3.3x
RENATA	35,002	2.6%	21.1x	2.3x
ISLAMIBANK	33,649	2.5%	19.8x	1.3x
BXPHERMA	32,479	2.4%	6.5x	0.8x
BRACBANK	32,157	2.4%	8.1x	1.2x
GP	30,004	2.2%	12.5x	7.7x
LHB	24,690	1.8%	15.7x	3.1x
EBL	24,199	1.8%	5.0x	0.7x
PUBALIBANK	20,448	1.5%	3.2x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	5.2x	0.5x
ALARABANK	13,534	1.0%	13.1x	0.9x
PRIMEBANK	12,985	1.0%	4.1x	0.7x
OLYMPIC	12,616	0.9%	16.6x	2.9x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	9.8x	0.5x
ROBI	10,738	0.8%	25.3x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MPETROLEUM	221.3	+1.6%	255.6	4.1x	0.9x
BSC	95.5	-5.6%	252.8	5.0x	0.9x
SQRPHARMA	224.0	+0.7%	239.6	9.5x	1.6x
ISLAMIBANK	57.5	-4.6%	175.4	19.8x	1.3x
MJLBD	99.4	+5.9%	174.5	11.4x	2.1x
FEKDIL	21.3	+2.4%	150.4	13.0x	1.0x
GP	328.8	+1.0%	143.5	12.5x	7.7x
BXPHERMA	86.0	+2.6%	139.7	6.5x	0.8x
LANKABAFIN	20.4	-0.5%	136.8	21.0x	1.1x
ORIONPHARM	43.2	-3.8%	97.0	9.8x	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	289.3	-7.2%	75.5	NM	19.4x
FUWANGFOOD	12.8	-6.6%	33.3	NM	6x
SONALIANS	277.7	-5.7%	67.0	32.3x	4.2x
OIMEX	24.8	-5.7%	62.6	31.8x	7.0x
BSC	95.5	-5.6%	252.8	5.0x	0.9x
SONARGAON	20.7	-5.5%	1.5	76.7x	1.1x
ETL	10.5	-5.4%	31.6	18.1x	0.8x
MONOSPOOL	119.2	-5.2%	6.7	40.0x	2.8x
FAREASTFIN	3.7	-5.1%	0.5	NM	NM
NLTUBES	71.4	-5.1%	19.1	32.2x	0.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BXPHERMA	86.0	83.5	3.0	2,075	173.45
BEACHHATCH	97.0	84.0	24.0	487	41.94
MJLBD	95.0	86.1	8.0	208	19.63
CENTRALINS	43.0	43.0	1.0	400	17.20
CRYSTALINS	60.0	60.0	1.0	225	13.50
UNIQUEHRL	51.2	51.2	3.0	200	10.24
QUASEMIND	26.0	26.0	2.0	258	6.71
MIDLANDBNK	34.1	34.1	1.0	194	6.62
LOVELLO	89.8	89.8	1.0	61	5.48
IDLCL	36.5	36.5	2.0	140	5.11

\* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.  
 \*\* The base of the Bond index starts at 100, starting from Jan 13, 2022  
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BXPHERMA	86.0	83.5	173.5	2,075	3
BEACHHATCH	97.0	84.0	41.9	487	24
MJLBD	95.0	86.1	19.6	208	8
CENTRALINS	43.0	43.0	17.2	400	1
CRYSTALINS	60.0	60.0	13.5	225	1
UNIQUEHRL	51.2	51.2	10.2	200	3
QUASEMIND	26.0	26.0	6.7	258	2
MIDLANDBNK	34.1	34.1	6.6	194	1
LOVELLO	89.8	89.8	5.5	61	1
IDLC	36.5	36.5	5.1	140	2
KBPPWBIL	150.2	147.0	4.6	31	4
BANKASIA	15.5	15.5	3.2	206	1
BEXIMCO	104.1	104.1	2.1	20	1
DACCADYE	13.3	13.3	1.4	105	1
SINGERBD	127.8	127.8	1.3	10	1
SONALIANS	300.0	300.0	0.9	3	1
PRAGATILIF	166.2	166.2	0.8	5	1
PRAGATILIF	166.2	166.2	0.8	5	1
1STPRIMFMF	36.9	36.9	0.7	20	1
SUNLIFEINS	55.0	55.0	0.7	12	1
FIRSTSBANK	6.3	6.3	0.6	100	1
GENNEXT	4.2	4.2	0.6	150	1
<b>Total</b>			<b>323.1</b>		<b>71</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CROWNCEMNT		0.0%	21%	Record Date	13-Nov-24
FARCHEM		0.0%	1%	Record Date	13-Nov-24
FEKDIL		0.0%	14%	Record Date	14-Nov-24
RAHIMTEXT		0.0%	10%	Record Date	14-Nov-24
BSRMLTD		0.0%	35%	Record Date	14-Nov-24
BSRMSTEEL		0.0%	32%	Record Date	14-Nov-24
KDSALTD		5.0%	5%	Record Date	14-Nov-24
HAKKANIPUL		0.0%	2%	Record Date	14-Nov-24
BBSCABLES		0.0%	1%	Record Date	14-Nov-24
ITC		0.0%	11%	Record Date	14-Nov-24
TILIL		0.0%	5%	Record Date	14-Nov-24
NAHEEACP		0.0%	4%	Record Date	14-Nov-24
INDEXAGRO		0.0%	25%	Record Date	14-Nov-24
BBS		0.0%	1%	Record Date	14-Nov-24
ADNTEL		0.0%	10%	Record Date	17-Nov-24

**Important DSE News**
**MPETROLEUM**

The Board of Directors has recommended 170% Cash Dividend for the year ended June 30, 2024. Date of AGM: 01.02.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 15.12.2024. The Company has also reported EPS of Tk. 50.11, NAV per share of Tk. 234.12 and NOCFPS of Tk. (46.17) for the year ended June 30, 2024 as against Tk. 40.86, Tk. 200.01 and Tk. 100.07 respectively for the year ended June 30, 2023.

**(Q1 Un-audited):** EPS was Tk. 12.73 for July-September 2024 as against Tk. 8.42 for July-September 2023; NOCFPS was Tk. 65.41 for July-September 2024 as against Tk. (68.91) for July-September 2023. NAV per share was Tk. 246.85 as on September 30, 2024 and Tk. 234.12 as on June 30, 2024.

**FUWANGFOOD**

The Board of Directors has recommended No dividend for the year ended June 30, 2024. Date of AGM: 26.12.2024, Time: 10:00 AM, Venue: Hybrid System i.e. in combination of physical presence of the shareholders at Raowa Convention Center, Eagle (Hall Number 3), Mohakhali, VIP Road, Dhaka 1206 and digital platform. Record date: 02.12.2024. The Company has also reported consolidated EPS of Tk. (0.31), consolidated NAV per share of Tk. 2.03 and consolidated NOCFPS of Tk. 0.46 for the year ended June 30, 2024 as against Tk. (0.56) (restated), Tk. 2.43 (restated) and Tk. 0.16 (restated) respectively for the year ended June 30, 2023.

**KAY&QUE**

The Board of Directors has recommended 3.00% Cash and 2.00% Stock Dividend for the year ended June 30, 2024. The Stock Dividend is subject to the BSEC approval. Date of AGM: 22.12.2024, Time: 11:00 AM, Venue: Anchor Tower, 108, Bir Uttam C. R. Dutta Road, Dhaka-1205 (Hybrid System). Record Date: 05.12.2024. The Company has also reported EPS of Tk. 0.67, NAV per share of Tk. 96.17 and NOCFPS of Tk. 0.99 for the year ended June 30, 2024 as against Tk. 0.32, Tk. 76.13 and Tk. 0.42 respectively for the year ended June 30, 2023.

**NLTUBES**

**(Q1 Un-audited):** EPS was Tk. 0.12 for July-September 2024 as against Tk. (0.10) for July-September 2023; NOCFPS was Tk. (0.08) for July-September 2024 as against Tk. (1.12) for July-September 2023. NAV per share was Tk. 136.41 as on September 30, 2024 and Tk. 136.28 as on June 30, 2024.

**WALTONHIL**

**(Q1 Un-audited):** EPS was Tk. 4.92 for July-September 2024 as against Tk. 6.67 for July-September 2023; NOCFPS was Tk. 3.92 for July-September 2024 as against Tk. 16.68 for July-September 2023. NAV per share with revaluation was Tk. 384.22 as on September 30, 2024 and Tk. 379.30 as on June 30, 2024; NAV per share without revaluation was Tk. 282.80 as on September 30, 2024 and Tk. 277.86 as on June 30, 2024.

**NCCBANK**

The company has informed that Alhaj Md. Nurun Newaz has been elected as the Chairman of the Board of Directors of the company.

**SQURPHARMA**

The company has informed that a total of 66,052,814 shares of Mrs. Anita Chowdhury, mother of the following Directors of the company, has been transmitted to her legal heirs as per the Succession Certificate issued by the Honorable Court. The shares have been transmitted as follows: Mr. Samuel S Chowdhury, Chairman (son), received 16,513,203 shares; Mrs. Ratna Patra, Vice Chairman (daughter), received 16,513,205 shares; Mr. Tapan Chowdhury, Managing Director (son), received 16,513,203 shares; and Mr. Anjan Chowdhury, Director (son), received 16,513,203 shares.

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