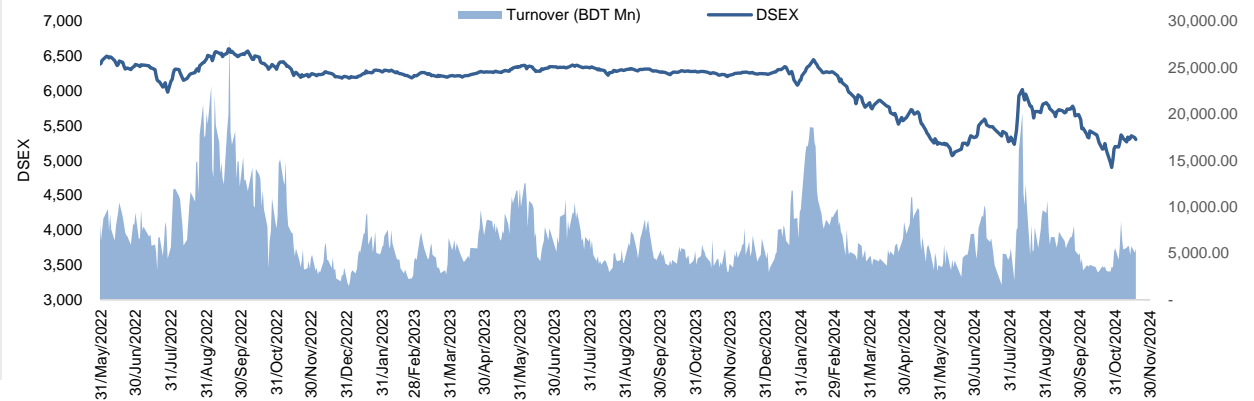


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.53%) lost 28.26 points and closed at 5,300.07. The blue-chip index DS30 (-0.70%), the Shariah-based index DSES (-0.97%), and the large-cap index CDSET (-0.88%) closed at 1,963.08, 1,171.43, and 1,081.30 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.16% followed by Fuel & Power (-1.05%), Pharmaceutical (-0.77%), Telecommunication (-0.71%), NBF1 (-0.55%), Food & Allied (-0.37%), and Engineering (-0.01%), respectively. Block trades contributed 3.6% of the overall market turnover. Agni Systems Ltd. (-10.0%) was the most traded share with a turnover of BDT 357 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,300.07	5,328.33	-28.26	-0.53%	-15.2%
DS30	1,963.08	1,976.92	-13.84	-0.70%	-6.2%
DSES	1,171.43	1,182.95	-11.52	-0.97%	-14.1%
CDSET	1,081.30	1,090.86	-9.56	-0.88%	-10.1%

Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

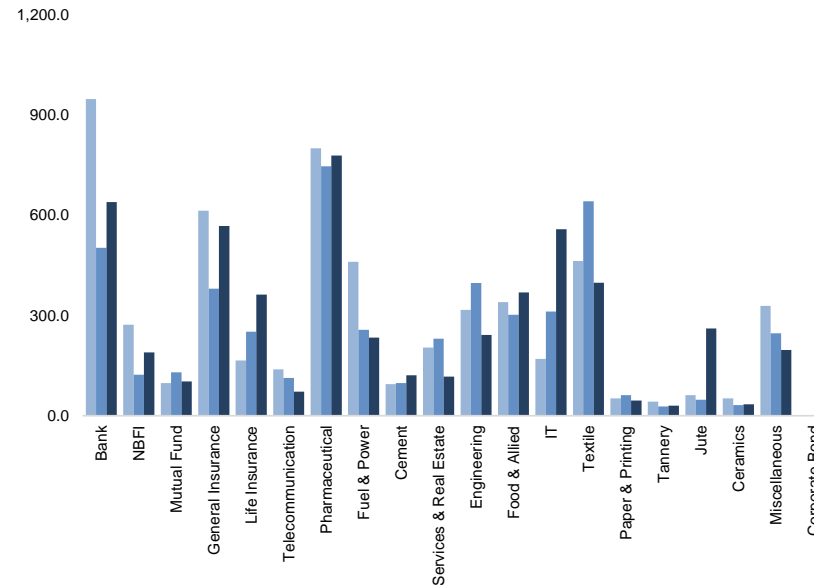
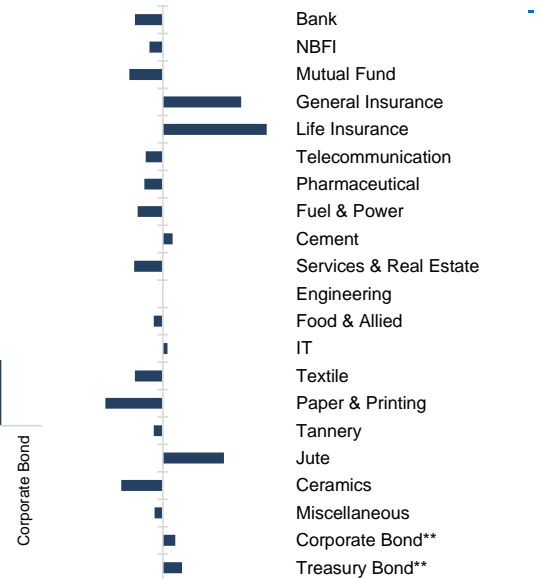


Figure: Sectorial Mcap Change

■ -5% ■ 0% ■ 5%



	Advanced	Declined	Unchanged	Total
All Category	133	205	42	380
A Category (Equity)	78	121	21	220
B Category (Equity)	30	45	6	81
N Category (Equity)	1	2	0	3
Z Category (Equity)	24	37	15	76
Mutual Funds	3	21	13	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,711,317	6,734,070	-0.3%
	Mn USD	55,928	56,117	
Turnover	Mn BDT	5,513	5,060	+9.0%
	Mn USD	46	42	
Volume	Mn Shares	175	177	-1.2%
	No. of Trade	179,434	166,566	+7.7%

\* Average Interbank Exchange Rate is BDT 120.00 as of Nov 18, 2024

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Market PE 15.0x  
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	1,463	1,480	-17.25	-1.16%	36	692,269	10.3%	638.6	12.0%	8.8x	0.7x	GP	430,476	11.7%	41.5	12.2x	7.5x
NBFI	1,261	1,268	-6.98	-0.55%	23	120,140	1.8%	189.6	3.6%	NM	NM	BATBC	203,850	5.6%	51.9	11.6x	3.3x
Mutual Fund	609	618	-8.61	-1.39%	37	28,002	0.4%	102.1	1.9%	NM	0.5x	SQRPHARMA	196,526	5.4%	106.1	9.4x	1.5x
General Insurance	3,023	2,927	+95.87	+3.28%	43	86,295	1.3%	567.4	10.7%	15.6x	1.3x	WALTONHIL	149,101	4.1%	5.4	11.4x	1.3x
Life Insurance	2,081	1,995	+86.45	+4.33%	15	55,354	0.8%	362.6	6.8%	NM	NM	ROBI	137,234	3.7%	24.3	25.0x	2.1x
Telecommunication	5,026	5,062	-36.08	-0.71%	3	589,331	8.8%	72.0	1.4%	13.9x	4.2x	BEXIMCO	103,842	2.8%	0.0	NM	1.3x
Pharmaceutical	3,000	3,024	-23.35	-0.77%	34	568,824	8.5%	778.3	14.6%	14.5x	1.6x	BRACBANK	89,017	2.4%	50.4	8.0x	1.2x
Fuel & Power	1,178	1,190	-12.55	-1.05%	23	311,835	4.6%	233.6	4.4%	15.1x	0.6x	ISLAMIBANK	88,710	2.4%	114.2	19.0x	1.2x
Cement	2,053	2,045	+8.34	+0.41%	7	97,852	1.5%	120.7	2.3%	16.5x	2.1x	UPGDCL	83,128	2.3%	0.0	8.0x	2.2x
Services & Real Estate	1,073	1,086	-13.04	-1.20%	9	59,009	0.9%	116.6	2.2%	21.9x	0.4x	BERGERPBL	81,778	2.2%	0.3	24.6x	5.1x
Engineering	2,532	2,532	-0.27	-0.01%	42	285,603	4.3%	241.9	4.6%	12.5x	0.9x	MARICO	73,269	2.0%	0.0	13.8x	9.6x
Food & Allied	17,469	17,534	-65.23	-0.37%	21	319,628	4.8%	368.7	6.9%	17.1x	4.5x	LHB	64,108	1.7%	13.9	15.9x	3.2x
IT	2,093	2,089	+4.16	+0.20%	11	27,609	0.4%	557.2	10.5%	20.4x	1.8x	ICB	56,719	1.5%	68.0	NM	1.3x
Textile	1,115	1,128	-13.13	-1.16%	58	115,715	1.7%	397.9	7.5%	91.8x	0.8x	UNILEVERCL	50,028	1.4%	0.2	68.1x	21.3x
Paper & Printing	4,196	4,299	-102.94	-2.39%	6	18,958	0.3%	45.3	0.9%	NM	0.8x	DUTCHBANGL	41,392	1.1%	2.5	6.6x	0.8x
Tannery	1,993	2,001	-7.54	-0.38%	6	22,210	0.3%	30.4	0.6%	68.0x	1.5x	BXPHERMA	38,767	1.1%	118.5	6.5x	0.8x
Jute	17,552	17,115	+436.94	+2.55%	3	3,864	0.1%	260.9	4.9%	NM	NM	POWERGRID	35,913	1.0%	3.5	NM	0.2x
Ceramics	362	368	-6.37	-1.73%	5	16,230	0.2%	33.8	0.6%	NM	1.0x	EBL	32,460	0.9%	25.8	5.0x	0.7x
Miscellaneous	4,208	4,222	-14.67	-0.35%	15	228,499	3.4%	196.3	3.7%	40.6x	1.8x	PUBALIBANK	32,391	0.9%	8.2	3.4x	0.6x
Corporate Bond**	11,226	11,169	+57.73	+0.52%	16	34,896	0.5%	0.3	0.0%	NM	NM	OLYMPIC	30,931	0.8%	10.3	16.8x	2.8x
Treasury Bond**	457	454	+3.63	+0.80%	237	3,028,739	45.1%	0.5	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
STYLECRAFT	50.8	+10.0%	3.6	NM	8.9x
TILIL	36.9	+9.8%	11.4	20.7x	NM
DOREENPWR	26.9	+9.8%	24.5	18.1x	0.5x
SAMATALETH	46.0	+9.8%	1.4	NM	3.2x
GHCL	25.9	+9.7%	23.1	NM	0.6x
MEGHNAINS	29.9	+9.52%	36.0	25.8x	2.1x
CLICL	40.6	+9.4%	42.4	NM	NM
PRAGATIINS	57.6	+9.1%	12.9	10.5x	1.0x
CNATEX	5.1	+8.5%	18.2	NM	NM
RUPALILIFE	101.7	+7.8%	36.5	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AGNISYSL	28.8	-10.0%	357.4	26.9x	1.8x
MATINSPINN	51.5	-10.0%	35.2	12.6x	1x
TOSRIFA	18.1	-6.2%	7.1	38.5x	0.6x
SPCL	37.0	-5.9%	28.3	86.0x	1.0x
TRUSTB1MF	3.4	-5.6%	0.7	NM	0.4x
EBL1STMF	3.6	-5.3%	0.4	NM	0.4x
BXPHERMA	86.9	-4.9%	118.5	6.5x	0.8x
MJLBD	94.0	-4.8%	45.8	10.0x	1.8x
ICBSONALI1	6.1	-4.7%	6.1	NM	0.9x
DSHGARME	65.3	-4.5%	0.9	NM	3.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	117,112	8.6%	9.4x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	11.6x	3.3x
RENATA	35,002	2.6%	23.4x	2.2x
ISLAMIBANK	33,649	2.5%	19.0x	1.2x
BXPHERMA	32,479	2.4%	6.5x	0.8x
BRACBANK	32,157	2.4%	8.0x	1.2x
GP	30,004	2.2%	12.2x	7.5x
LHB	24,690	1.8%	15.9x	3.2x
EBL	24,199	1.8%	5.0x	0.7x
PUBALIBANK	20,448	1.5%	3.4x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.7x	0.5x
ALARABANK	13,534	1.0%	12.9x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.8x	2.8x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	48.9x	0.5x
ROBI	10,738	0.8%	25.0x	2.1x

\* 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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AGNISYSL	28.8	-10.0%	357.4	26.9x	1.8x
SONALIANSH	299.7	+2.4%	259.9	34.9x	4.5x
MIDLANDBNK	33.7	-1.5%	131.2	19.5x	2.3x
BSC	95.8	-0.6%	129.1	5.0x	0.9x
BXPHERMA	86.9	-4.9%	118.5	6.5x	0.8x
ISLAMIBANK	55.1	-1.4%	114.2	19.0x	1.2x
SQRPHARMA	221.7	-0.8%	106.1	9.4x	1.5x
LOVELLO	84.1	-1.8%	102.2	45.8x	6.5x
BEACHHATCH	95.3	+5.3%	96.1	49.4x	7.6x
CONFIDCEM	66.8	+5.5%	94.3	6.3x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MIDLANDBNK	34.9	31.9	3.0	3,023	102.13
BEACHHATCH	93.0	86.1	23.0	587	51.23
EBL	23.9	23.9	7.0	562	13.43
SHEPHERD	15.0	15.0	5.0	535	8.02
BRACBANK	52.7	52.3	2.0	119	6.23
DUTCHBANGL	52.2	52.2	1.0	99	5.15
PREMIERCEM	56.0	56.0	2.0	55	3.11
ADNTEL	84.5	84.5	1.0	25	2.11
SIBL	9.6	9.6	1.0	143	1.37
PARAMOUNT	49.8	49.8	1.0	24	1.20

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MIDLANDBNK	34.9	31.9	102.1	3,023	3
BEACHHATCH	93.0	86.1	51.2	587	23
EBL	23.9	23.9	13.4	562	7
SHEPHERD	15.0	15.0	8.0	535	5
BRACBANK	52.7	52.3	6.2	119	2
DUTCHBANGL	52.2	52.2	5.1	99	1
PREMIERCEM	56.0	56.0	3.1	55	2
ADNTEL	84.5	84.5	2.1	25	1
SIBL	9.6	9.6	1.4	143	1
PARAMOUNT	49.8	49.8	1.2	24	1
ACFL	21.4	21.4	1.1	50	1
SUNLIFEINS	60.0	60.0	0.8	14	1
IBNSINA	295.0	295.0	0.7	2	1
DOMINAGE	13.4	13.4	0.6	47	1
BSC	100.0	100.0	0.6	6	1
BESTHLDNG	22.2	22.2	0.5	23	1
<b>Total</b>			<b>198.8</b>		<b>53</b>

**Important DSE News**
**ICB**

The Board of Directors has recommended 2% Cash Dividend for the year ended June 30, 2024. Date of AGM: 21.12.2024, Time: 10:30 AM, Venue: Digital Platform. Record Date: 05.12.2024. The Company has also reported Consolidated EPS of Tk. 0.38, Consolidated NAV per share of Tk. 51.95 and Consolidated NOCFPS of Tk. 4.20 for the year ended June 30, 2024 as against Tk. 0.89, Tk. 52.04 and Tk. 1.30 respectively for the year ended June 30, 2023.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
VFSTD		0.0%	0%	Record Date	19-Nov-24
AMCL(PRAN)		0.0%	32%	Record Date	19-Nov-24
RANFOUNDRY		0.0%	23%	Record Date	19-Nov-24
QUASEMIND		0.0%	2%	Record Date	19-Nov-24
SAMORITA		0.0%	5%	Record Date	19-Nov-24
PTL		10.0%	5%	Record Date	19-Nov-24
SAIHAMTEX		0.0%	5%	Record Date	19-Nov-24
INTRACO		0.0%	1%	Record Date	19-Nov-24
SAFKOSPINN		0.0%	0%	Record Date	19-Nov-24
LEGACYFOOT		0.0%	1%	Record Date	19-Nov-24
SHEPHERD		0.0%	1%	Record Date	19-Nov-24
NAVANAPHAR		0.0%	14%	Record Date	19-Nov-24
BATBC		0.0%	150%	Record Date	19-Nov-24
BATASHOE		0.0%	340%	Record Date	19-Nov-24
ANLIMAYARN		0.0%	0%	Record Date	20-Nov-24

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