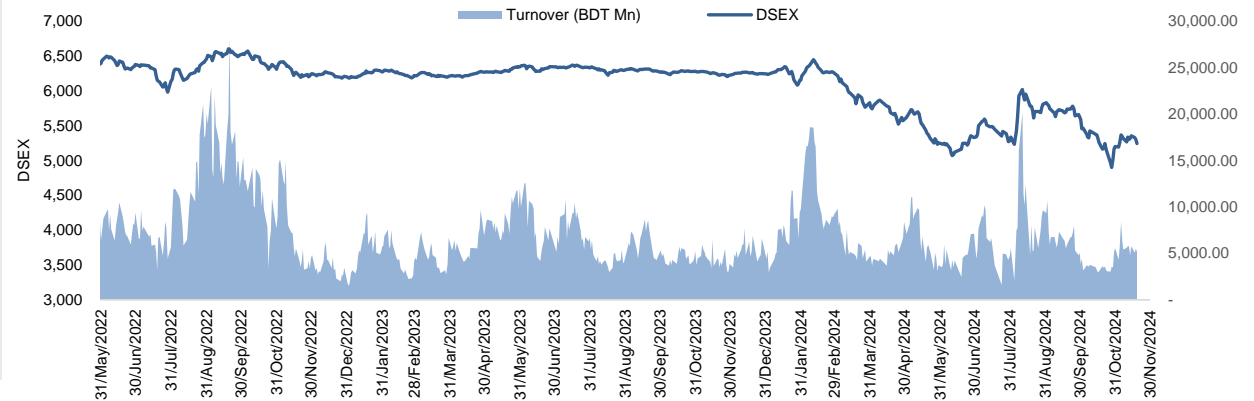


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.08%) lost 57.41 points and closed at 5,242.66. The blue-chip index DS30 (-1.03%), the Shariah-based index DSES (-1.49%), and the large-cap index CDSET (-1.19%) closed at 1,942.90, 1,153.93, and 1,068.39 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 1.64%, followed by Food & Allied (+0.42%), Telecommunication (+0.14%), Engineering (-0.75%), Bank (-1.08%), Pharmaceutical (-1.50%), and Fuel & Power (-2.42%), respectively. Block trades contributed 2.8% of the overall market turnover. Fine Foods Limited (+8.3%) was the most traded share with a turnover of BDT 216 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,242.66	5,300.07	-57.41	-1.08%	-16.1%
DS30	1,942.90	1,963.08	-20.18	-1.03%	-7.2%
DSES	1,153.93	1,171.43	-17.50	-1.49%	-15.4%
CDSET	1,068.39	1,081.30	-12.91	-1.19%	-11.2%

	Advanced	Declined	Unchanged	Total
All Category	76	267	45	388
A Category (Equity)	50	149	27	226
B Category (Equity)	12	60	7	79
N Category (Equity)	0	5	0	5
Z Category (Equity)	14	53	11	78
Mutual Funds	2	25	10	37
Corporate Bonds	1	1	2	4
Treasury Bonds	1	2	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,666,844	6,711,317	-0.7%
	Mn USD	55,557	55,928	
Turnover	Mn BDT	5,149	5,513	-6.6%
	Mn USD	43	46	
Volume	Mn Shares	168	175	-4.1%
No. of Trade		181,081	179,434	+0.9%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 19, 2024

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Figure: Sectorial Turnover (BDT Mn)

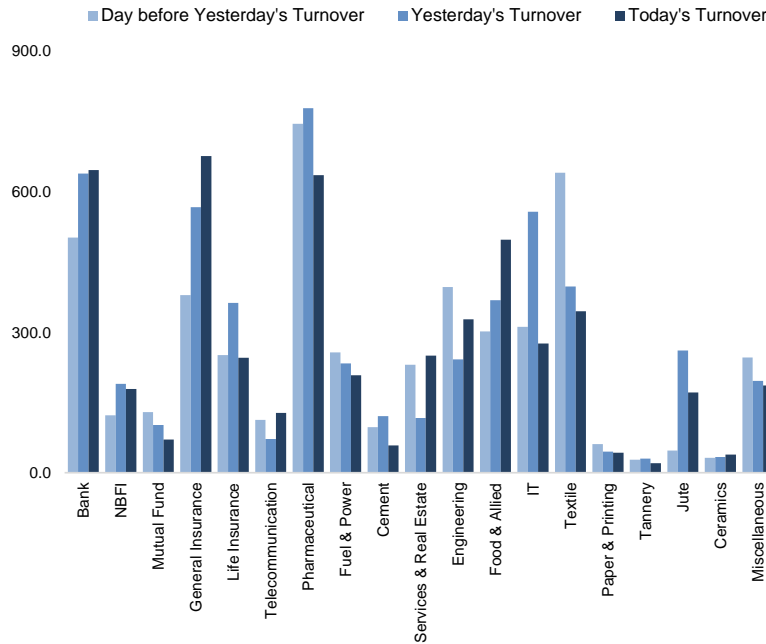
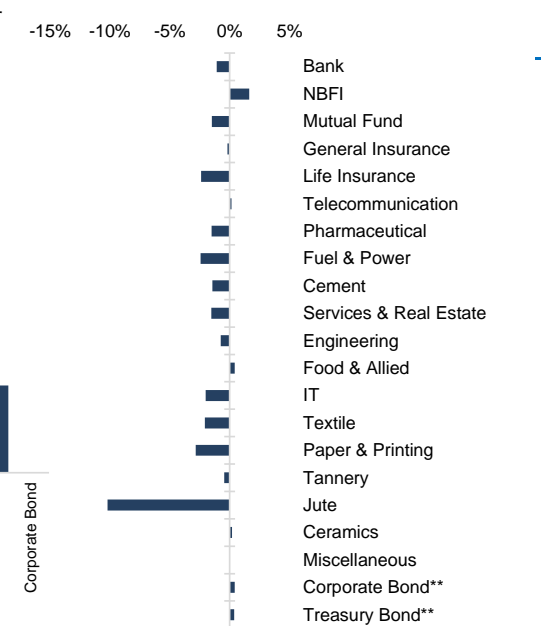


Figure: Sectorial Mcap Change



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	1,447	1,463	-15.77	-1.08%	36	684,805	10.3%	646.4	12.9%	8.7x	0.7x	GP	432,636	11.9%	90.6	12.2x	7.5x
NBFI	1,281	1,261	+20.73	+1.64%	23	122,115	1.8%	178.9	3.6%	NM	NM	BATBC	203,850	5.6%	0.0	11.6x	3.3x
Mutual Fund	600	609	-9.05	-1.49%	37	27,586	0.4%	70.7	1.4%	NM	0.5x	SQURPHARMA	195,906	5.4%	79.4	9.3x	1.5x
General Insurance	3,017	3,023	-5.68	-0.19%	43	86,133	1.3%	676.1	13.5%	15.6x	1.3x	WALTONHIL	148,889	4.1%	8.0	11.4x	1.3x
Life Insurance	2,032	2,081	-49.73	-2.39%	15	54,031	0.8%	245.3	4.9%	NM	NM	ROBI	136,186	3.7%	31.6	24.8x	2.1x
Telecommunication	5,033	5,026	+7.26	+0.14%	3	590,182	8.9%	127.9	2.6%	14.0x	4.2x	BEXIMCO	103,842	2.9%	0.0	NM	1.3x
Pharmaceutical	2,948	2,993	-44.97	-1.50%	34	560,278	8.4%	635.4	12.7%	14.3x	1.6x	BRACBANK	87,601	2.4%	54.9	7.9x	1.2x
Fuel & Power	1,149	1,178	-28.49	-2.42%	23	304,292	4.6%	208.0	4.2%	14.8x	0.6x	ISLAMIBANK	84,686	2.3%	141.2	18.1x	1.2x
Cement	2,024	2,053	-29.53	-1.44%	7	96,445	1.4%	58.3	1.2%	16.2x	2.1x	BERGERPBL	82,284	2.3%	0.0	24.7x	5.2x
Services & Real Estate	1,057	1,073	-16.38	-1.53%	9	58,108	0.9%	249.9	5.0%	21.5x	0.4x	UPGDCL	77,795	2.1%	10.2	7.4x	2.0x
Engineering	2,512	2,531	-18.90	-0.75%	42	283,417	4.3%	327.5	6.5%	12.4x	0.9x	MARICO	72,441	2.0%	3.2	13.7x	9.5x
Food & Allied	17,541	17,469	+72.90	+0.42%	21	320,962	4.8%	497.8	9.9%	17.2x	4.5x	LHB	63,179	1.7%	9.3	15.6x	3.1x
IT	2,046	2,088	-41.96	-2.01%	11	26,989	0.4%	276.0	5.5%	20.0x	1.7x	ICB	58,453	1.6%	65.2	NM	1.3x
Textile	1,092	1,115	-23.17	-2.08%	58	113,310	1.7%	344.8	6.9%	89.8x	0.7x	UNILEVERCL	50,431	1.4%	0.1	68.6x	21.5x
Paper & Printing	4,077	4,196	-119.05	-2.84%	6	18,420	0.3%	42.8	0.9%	NM	0.8x	DUTCHBANGL	41,392	1.1%	1.4	6.6x	0.8x
Tannery	1,984	1,993	-9.03	-0.45%	6	22,109	0.3%	20.2	0.4%	67.7x	1.5x	BXPHERMA	37,696	1.0%	98.4	6.3x	0.8x
Jute	15,762	17,552	-1790.18	-10.20%	3	3,470	0.1%	171.2	3.4%	NM	NM	POWERGRID	35,638	1.0%	1.2	NM	0.2x
Ceramics	362	362	+0.70	+0.19%	5	16,262	0.2%	38.8	0.8%	NM	1.0x	EBL	32,324	0.9%	14.9	4.9x	0.7x
Miscellaneous	4,208	4,208	+0.44	+0.01%	15	228,523	3.4%	186.1	3.7%	40.6x	1.8x	PUBALIBANK	31,929	0.9%	7.7	3.3x	0.6x
Corporate Bond**	11,273	11,226	+46.57	+0.41%	16	34,723	0.5%	0.7	0.0%	NM	NM	OLYMPIC	31,710	0.9%	10.7	17.3x	2.8x
Treasury Bond**	459	457	+1.75	+0.38%	237	3,014,221	45.2%	2.7	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	27.9	+9.8%	63.2	21.5x	NM
NITOLINS	31.7	+9.7%	20.9	26.2x	1.0x
PROVATIINS	36.1	+8.7%	58.2	24.7x	1.6x
FINEFOODS	199.3	+8.3%	215.7	NM	17.6x
GOLDENSON	14.9	+8.0%	51.2	NM	0.8x
TILIL	39.2	+6.23%	24.3	20.4x	NM
BDFINANCE	13.8	+6.2%	8.7	NM	1x
SPCERAMICS	14.1	+6.0%	26.5	NM	0.5x
JAMUNABANK	19.7	+5.3%	150.4	5.3x	0.8x
APEXFOODS	234.3	+5.2%	7.1	42.8x	1.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.3x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	11.6x	3.3x
RENATA	35,002	2.6%	23.0x	2.1x
ISLAMIBANK	33,649	2.5%	18.1x	1.2x
BXPHERMA	32,479	2.4%	6.3x	0.8x
BRACBANK	32,157	2.4%	7.9x	1.2x
GP	30,004	2.2%	12.2x	7.5x
LHB	24,690	1.8%	15.6x	3.1x
EBL	24,199	1.8%	4.9x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	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%	12.6x	0.9x
PRIMEBANK	12,985	1.0%	4.1x	0.7x
OLYMPIC	12,616	0.9%	17.3x	2.8x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	46.3x	0.4x
ROBI	10,738	0.8%	24.8x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FINEFOODS	199.3	+8.3%	215.7	NM	17.6x
SONALIANS	264.0	-11.9%	170.5	81.7x	4.3x
JAMUNABANK	19.7	+5.3%	150.4	5.3x	0.8x
ISLAMIBANK	52.6	-4.5%	141.2	18.1x	1.2x
BSC	93.3	-2.6%	125.6	4.9x	0.9x
AGNISYSL	26.9	-6.6%	120.0	25.1x	1.6x
SAPORTL	24.5	-	104.2	11.2x	0.7x
BXPHERMA	84.5	-2.8%	98.4	6.3x	0.8x
CITYGENINS	49.1	+0.4%	95.9	15.0x	2.3x
GP	320.4	+0.5%	90.6	12.2x	7.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONALIANS	264.0	-11.9%	170.5	81.7x	4.3x
KPCL	13.1	-9.7%	20.3	NM	1x
ZEALBANGLA	99.9	-8.5%	1.4	NM	NM
NAVANACNG	21.7	-7.7%	1.5	NM	0.7x
SHYAMPUSUG	104.9	-6.8%	2.6	NM	NM
AGNISYSL	26.9	-6.6%	120.0	25.1x	1.6x
GBBPOWER	7.2	-6.5%	1.1	NM	0.4x
UPGDCL	134.2	-6.4%	10.2	7.4x	2.0x
RSRMSTEEL	9.3	-6.1%	0.1	NM	0.2x
MLDYEING	8.2	-5.7%	3.8	43.2x	0.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	101.2	87.0	15.0	427	37.84
ALARABANK	19.4	19.4	1.0	1,130	21.92
FINEFOODS	187.0	178.0	8.0	117	21.32
MIDLANDBNK	34.8	30.5	5.0	527	16.93
BEXIMCO	104.1	104.1	1.0	62	6.49
EBL	23.9	23.9	2.0	200	4.78
PUBALIBANK	28.4	28.4	1.0	155	4.40
CNATEX	4.6	4.6	1.0	900	4.14
LOVELLO	82.0	82.0	2.0	40	3.28
RENATA	640.0	640.0	1.0	5	3.20

* 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
BEACHHATCH	101.2	87.0	37.8	427	15
ALARABANK	19.4	19.4	21.9	1,130	1
FINEFOODS	187.0	178.0	21.3	117	8
MIDLANDBNK	34.8	30.5	16.9	527	5
BEXIMCO	104.1	104.1	6.5	62	1
EBL	23.9	23.9	4.8	200	2
PUBALIBANK	28.4	28.4	4.4	155	1
CNATEX	4.6	4.6	4.1	900	1
LOVELLO	82.0	82.0	3.3	40	2
RENATA	640.0	640.0	3.2	5	1
EIL	53.5	53.5	2.9	54	1
AIL	104.7	104.7	1.9	19	1
ISLAMIBANK	59.8	59.8	1.8	30	1
ROBI	26.5	26.5	1.6	62	1
RELIANCE1	20.0	18.5	1.4	72	2
DOMINAGE	12.9	12.9	1.3	100	1
DOREENPWR	24.4	24.4	1.0	40	1
DOREENPWR	24.4	24.4	1.0	40	1
IPDC	17.8	17.8	0.9	50	1
ABBANK	8.0	8.0	0.8	100	1
ORIONPHARM	40.4	40.4	0.7	17	1
AFTABAUTO	38.0	38.0	0.6	17	1
Total			142.9		56

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ANLIMAYARN		0.0%	0%	Record Date	20-Nov-24
TOSRIFA		0.0%	4%	Record Date	20-Nov-24
GENEXIL		0.0%	3%	Record Date	20-Nov-24
SHYAMPSUG		0.0%	0%	Record Date	20-Nov-24
BDAUTOCA		0.0%	2%	Record Date	20-Nov-24
DOREENPWR		0.0%	10%	Record Date	20-Nov-24
ACMELAB		0.0%	35%	Record Date	20-Nov-24
ZEALBANGLA		0.0%	0%	Record Date	20-Nov-24
MEGHNACEM		0.0%	0%	Record Date	20-Nov-24
SHASHADNIM		0.0%	10%	Record Date	20-Nov-24
ADVENT		0.0%	1%	Record Date	20-Nov-24
RENWICKJA		0.0%	0%	Record Date	20-Nov-24
BPML		0.0%	0%	Record Date	20-Nov-24
KBPPWBIL		0.0%	1%	Record Date	20-Nov-24
FUWANGCER		0.0%	2%	Record Date	20-Nov-24

Important DSE News
PREMIERLEA

The Board of Directors has recommended No Dividend for the year ended December 31, 2023. Date of AGM: 26.12.2024, Time: 11:00 AM, Venue: Through Hybrid System in combination of physical presence of shareholders at New Sindurpur Hall (4th floor), FARS Hotel and Resorts, 212, Shahid Syed Nazrul Islam Sharani, Purana Paltan, Dhaka-1000 and presence or connection of shareholders through digital platform. Record Date: 09.12.2024. The Company has also reported Consolidated EPS of Tk. (28.55), Consolidated NAV per share of Tk. (46.79) and Consolidated NOCFPS of Tk. 26.41 for the year ended December 31, 2023 as against Tk. (15.97), Tk. (18.23) and Tk. 12.19 respectively for the year ended December 31, 2022.

(Q1 Un-audited): Consolidated EPS was Tk. (2.36) for January-March 2024 as against Tk. (1.56) for January-March 2023. Consolidated NOCFPS was Tk. 1.23 for January-March 2024 as against Tk. 0.97 for January-March 2023. Consolidated NAV per share was Tk. (49.16) as on March 31, 2024 and Tk. (19.79) as on March 31, 2023.

(Q2 Un-audited): Consolidated EPS was Tk. (3.21) for April-June 2024 as against Tk. (2.67) for April-June 2023. Consolidated EPS was Tk. (5.56) for January-June 2024 as against Tk. (4.22) for January-June 2023. Consolidated NOCFPS was Tk. 2.39 for January-June 2024 as against Tk. 2.90 for January-June 2023. Consolidated NAV per share was Tk. (52.40) as on June 30, 2024 and Tk. (22.48) as on June 30, 2023.

(Q3 Un-audited): Consolidated EPS was Tk. (0.66) for July-September 2024 as against Tk. (1.57) for July-September 2023. Consolidated EPS was Tk. (6.22) for January-September 2024 as against Tk. (5.79) for January-September 2023. Consolidated NOCFPS was Tk. 2.39 for January-September 2024 as against Tk. 4.16 for January-September 2023. Consolidated NAV per share was Tk. (53.07) as on September 30, 2024 and Tk. (24.04) as on September 30, 2023.

SONALIANSH

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2024. Date of AGM: 31.12.2024, Time: 11:30 AM, Venue: Digital Platform. Record Date: 09.12.2024. The Company has also reported EPS of Tk. 3.23, NAV per share of Tk. 61.80 and NOCFPS of Tk. 7.71 for the year ended June 30, 2024 as against Tk. 3.86, Tk. 118.14 and Tk. 16.93 respectively for the year ended June 30, 2023.

ACI

Refer to the earlier news disseminated by DSE on 14.07.2022 regarding arrangement for demerger and merger subject to proper authorities' approval, the company has further informed that, in accordance with that earlier disclosures and Judgment passed in the Company Matter No. 272 of 2022 on 7 November 2023 by the Honorable High Court Division, 195,374 Nos. of ordinary shares of Tk. 10/- (Taka Ten) each only will be issued and allotted in favour of the equity shareholders of Premiaflex Plastics Limited as per the following table: (Name of the Shareholders - Quantity of Ordinary Shares - Face Value (BDT) - Total Amount of Issued Shares (BDT)): 1. Mr. M anis Ud Dowla - 194,989 shares - Tk. 10.00 - BDT 1,949,890.00; 2. Dr. Arif Dowla - 195 shares - Tk. 10.00 - BDT 1,950.00; 3. Ms. Shusmita Anis - 190 shares - Tk. 10.00 - BDT. 1,900.00 and the authorized share capital of Premiaflex Plastics Limited i.e. BDT 150.00 Crore will be added with the current Authorized Capital of the Company in line with the said order and the article 38 of the Scheme of Amalgamation. Accordingly, the Authorized Capital of Advanced Chemical Industries Limited will now become BDT 300.00 Crore.

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