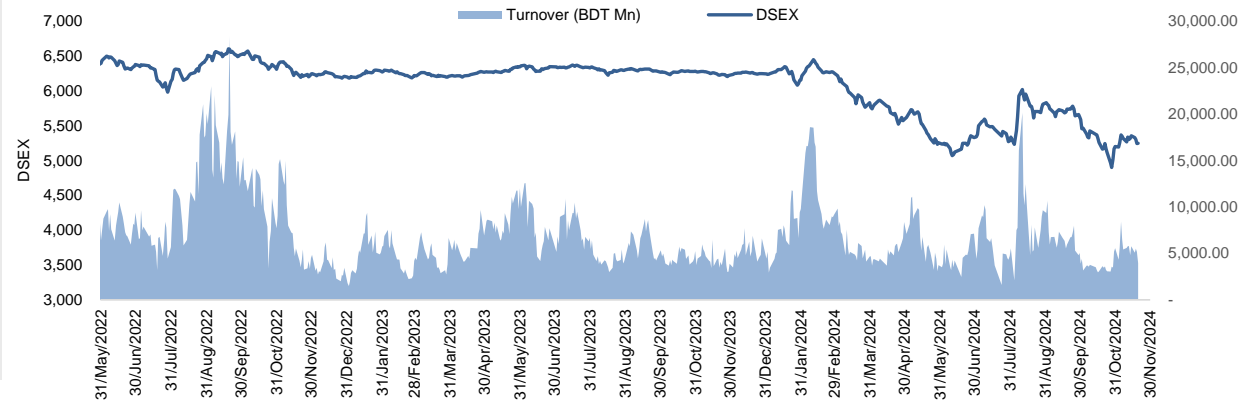


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.05%) gained 2.6 points and closed at 5,245.26. The blue-chip index DS30 (-0.43%), the Shariah-based index DSES (+0.74%), and the large-cap index CDSET (+0.15%) closed at 1,934.64, 1,162.52, and 1,070.03 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 5.23%, followed by Bank (+0.63%), Telecommunication (+0.46%), Pharmaceutical (+0.02%), Engineering (-0.24%), Fuel & Power (-0.59%), and Food & Allied (-2.31%), respectively. Block trades contributed 4.8% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+3.8%) was the most traded share with a turnover of BDT 134 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,245.26	5,242.66	+2.60	+0.05%	-16.0%
DS30	1,934.64	1,942.90	-8.26	-0.43%	-7.6%
DSES	1,162.52	1,153.93	+8.59	+0.74%	-14.8%
CDSET	1,070.03	1,068.39	+1.64	+0.15%	-11.0%

	Advanced	Declined	Unchanged	Total
All Category	113	183	83	379
A Category (Equity)	63	118	46	227
B Category (Equity)	27	27	21	75
N Category (Equity)	1	2	0	3
Z Category (Equity)	22	36	16	74
Mutual Funds	7	4	26	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,656,039	6,666,844	-0.2%
Mn USD	55,467	55,557	
Turnover			
Mn BDT	3,931	5,149	-23.7%
Mn USD	33	43	
Volume			
Mn Shares	127	168	-24.6%
No. of Trade	138,600	181,081	-23.5%

* Based on Traded Scrips

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Figure: Sectorial Turnover (BDT Mn)

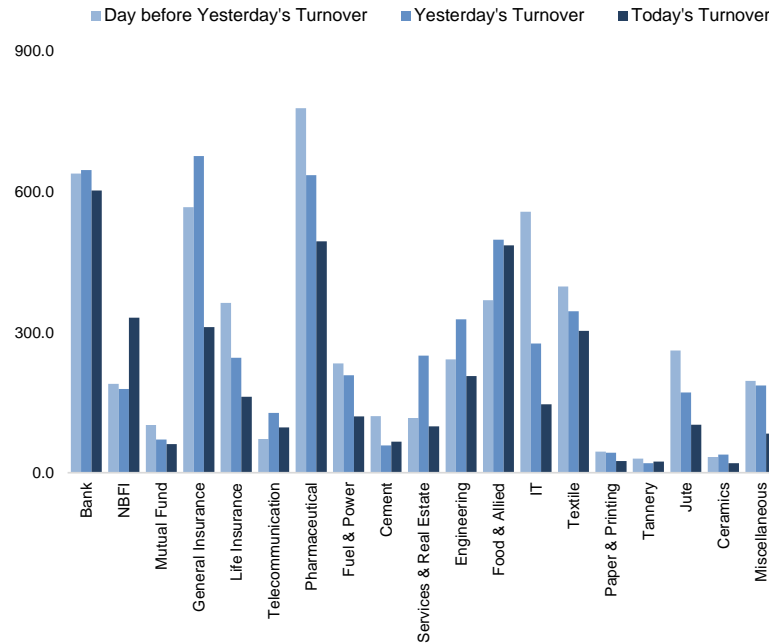
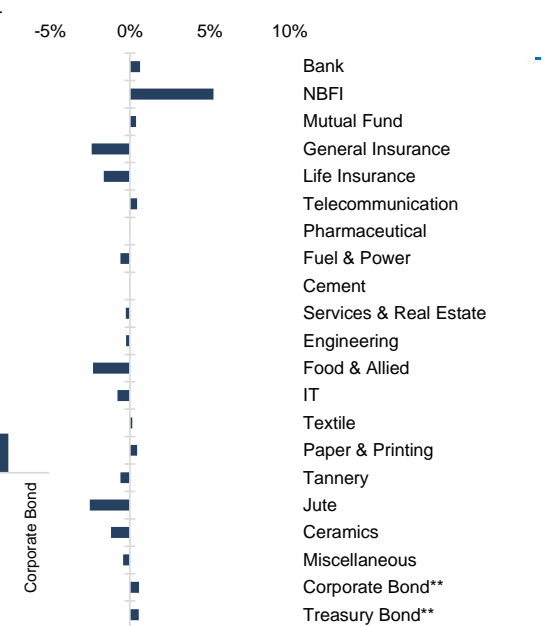


Figure: Sectorial Mcap Change



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	1,456	1,447	+9.13	+0.63%	36	689,125	10.4%	602.8	16.1%	8.8x	0.7x	GP	436,012	12.0%	73.8	12.3x	7.5x
NBFI	1,349	1,281	+67.08	+5.23%	23	128,508	1.9%	331.0	8.8%	NM	NM	SQURPHARMA	196,615	5.4%	105.8	9.4x	1.5x
Mutual Fund	602	600	+2.29	+0.38%	37	27,692	0.4%	61.2	1.6%	NM	0.5x	BATBC	196,452	5.4%	39.2	11.2x	3.2x
General Insurance	2,945	3,017	-72.11	-2.39%	43	84,074	1.3%	311.0	8.3%	15.2x	1.3x	WALTONHIL	148,193	4.1%	5.1	11.4x	1.3x
Life Insurance	1,998	2,032	-33.09	-1.63%	15	53,151	0.8%	162.4	4.3%	NM	NM	ROBI	135,662	3.7%	18.5	24.7x	2.1x
Telecommunication	5,056	5,033	+23.21	+0.46%	3	592,903	8.9%	96.6	2.6%	14.0x	4.2x	BEXIMCO	103,842	2.9%	0.0	NM	1.3x
Pharmaceutical	2,956	2,955	+0.68	+0.02%	34	560,406	8.4%	494.0	13.2%	14.3x	1.6x	ISLAMIBANK	87,583	2.4%	117.7	18.8x	1.2x
Fuel & Power	1,143	1,149	-6.78	-0.59%	23	302,498	4.5%	120.3	3.2%	14.7x	0.6x	BRACBANK	87,070	2.4%	69.5	7.9x	1.2x
Cement	2,023	2,024	-0.87	-0.04%	7	96,404	1.4%	66.6	1.8%	16.2x	2.1x	BERGERPBL	81,653	2.2%	0.5	24.5x	5.1x
Services & Real Estate	1,054	1,057	-2.73	-0.26%	9	57,958	0.9%	99.1	2.6%	19.3x	0.4x	UPGDCL	75,708	2.1%	7.8	7.2x	2.0x
Engineering	2,506	2,512	-5.93	-0.24%	42	282,748	4.2%	206.6	5.5%	12.4x	0.9x	MARICO	73,083	2.0%	5.3	13.8x	9.6x
Food & Allied	17,137	17,541	-404.45	-2.31%	21	313,561	4.7%	485.6	13.0%	16.8x	4.4x	LHB	63,179	1.7%	9.3	15.6x	3.1x
IT	2,030	2,046	-15.96	-0.78%	11	26,778	0.4%	146.0	3.9%	19.8x	1.7x	ICB	63,050	1.7%	115.9	NM	1.4x
Textile	1,093	1,092	+1.73	+0.16%	58	113,489	1.7%	302.8	8.1%	90.0x	0.7x	UNILEVERCL	50,213	1.4%	0.1	68.3x	21.4x
Paper & Printing	4,095	4,077	+18.29	+0.45%	6	18,503	0.3%	25.0	0.7%	NM	0.8x	DUTCHBANGL	41,305	1.1%	1.9	6.6x	0.8x
Tannery	1,973	1,984	-11.74	-0.59%	6	21,979	0.3%	23.9	0.6%	67.3x	1.5x	BXPHERMA	36,760	1.0%	85.2	6.1x	0.7x
Jute	15,366	15,762	-396.08	-2.51%	3	3,382	0.1%	102.7	2.7%	NM	NM	POWERGRID	36,095	1.0%	2.6	NM	0.2x
Ceramics	358	362	-4.27	-1.18%	5	16,070	0.2%	20.7	0.6%	NM	1.0x	EBL	32,324	0.9%	73.8	4.9x	0.7x
Miscellaneous	4,191	4,208	-17.73	-0.42%	15	227,561	3.4%	83.8	2.2%	40.5x	1.8x	PUBALIBANK	31,929	0.9%	5.3	3.3x	0.6x
Corporate Bond**	11,338	11,273	+64.69	+0.57%	16	34,604	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,470	0.9%	10.2	17.1x	2.8x
Treasury Bond**	462	459	+2.53	+0.55%	237	3,004,166	45.1%	0.7	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DESHBANDHU	17.0	+9.7%	9.0	NM	1.0x
QUEENSOUTH	12.5	+9.6%	19.8	40.3x	0.8x
JUTESPINN	224.0	+8.7%	0.9	NM	NM
ICB	72.7	+7.9%	115.9	NM	1.4x
FINEFOODS	214.9	+7.8%	105.5	NM	19.0x
ISNLTD	34.9	+6.08%	7.7	NM	12.0x
DBH	41.6	+5.9%	54.7	8.3x	1x
RSRMSTEEL	9.8	+5.4%	0.2	NM	0.2x
MAKSONSPIN	8.0	+5.3%	5.0	NM	0.6x
NHFIL	28.0	+5.3%	16.4	59.6x	1.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SPCERAMICS	13.1	-7.1%	16.6	NM	0.4x
STYLECRAFT	46.7	-7.0%	2.4	NM	8x
BDTHAIFOOD	15.9	-5.9%	2.7	NM	1.1x
SONARBAINS	29.3	-5.8%	3.7	NM	1.3x
SAFKOSPINN	8.5	-5.6%	0.0	NM	NM
RANFOUNDRY	140.1	-4.6%	0.2	37.0x	4.0x
CITYGENINS	47.0	-4.3%	40.1	14.3x	2.2x
PRIMEINSUR	38.4	-4.2%	4.1	17.1x	1.8x
SONALIANSH	253.3	-4.1%	101.7	78.4x	4.1x
BGIC	35.7	-4.0%	1.1	30.3x	1.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.4x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	11.2x	3.2x
RENATA	35,002	2.6%	23.1x	2.1x
ISLAMIBANK	33,649	2.5%	18.8x	1.2x
BXPHERMA	32,479	2.4%	6.1x	0.7x
BRACBANK	32,157	2.4%	7.9x	1.2x
GP	30,004	2.2%	12.3x	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%	12.8x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.1x	2.8x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	45.7x	0.4x
ROBI	10,738	0.8%	24.7x	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
LOVELLO	87.2	+3.8%	134.3	47.5x	6.7x
ISLAMIBANK	54.4	+3.4%	117.7	18.8x	1.2x
ICB	72.7	+7.9%	115.9	NM	1.4x
SQURPHARMA	221.8	+0.4%	105.8	9.4x	1.5x
FINEFOODS	214.9	+7.8%	105.5	NM	19.0x
SONALIANSH	253.3	-4.1%	101.7	78.4x	4.1x
AGNISYSL	27.4	+1.9%	86.2	25.6x	1.7x
BXPHERMA	82.4	-2.5%	85.2	6.1x	0.7x
BEACHHATCH	97.3	+1.8%	82.3	50.4x	7.8x
MIDLANDBNK	33.6	+2.1%	76.6	19.4x	2.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EBL	23.8	23.4	13.0	1,800	42.67
BEACHHATCH	104.2	89.0	16.0	391	36.17
MIDLANDBNK	33.9	32.4	4.0	674	22.28
LOVELLO	88.1	82.0	5.0	229	19.26
FINEFOODS	205.0	185.1	16.0	92	18.03
SONALILIFE	59.0	57.0	2.0	145	8.38
ORIONINFU	301.2	301.1	2.0	17	4.97
AIL	103.0	88.0	2.0	47	4.24
QUASEMIND	27.8	25.5	3.0	153	4.11
PUBALIBANK	28.3	28.3	1.0	145	4.10

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EBL	23.8	23.4	42.7	1,800	13
BEACHHATCH	104.2	89.0	36.2	391	16
MIDLANDBNK	33.9	32.4	22.3	674	4
LOVELLO	88.1	82.0	19.3	229	5
FINEFOODS	205.0	185.1	18.0	92	16
SONALILIFE	59.0	57.0	8.4	145	2
ORIONINFU	301.2	301.1	5.0	17	2
AIL	103.0	88.0	4.2	47	2
QUASEMIND	27.8	25.5	4.1	153	3
PUBALIBANK	28.3	28.3	4.1	145	1
CNATEX	4.5	4.5	4.1	900	1
AL-HAJTEX	102.0	100.0	2.2	22	3
ACFL	20.3	20.3	2.0	100	1
GBBPOWER	7.2	7.2	1.8	250	1
RELIANCE1	17.5	17.5	1.8	100	1
BEXIMCO	126.1	104.1	1.5	13	3
MJLBD	94.4	94.4	1.2	12	1
MJLBD	94.4	94.4	1.2	12	1
BXPHARMA	85.5	85.5	1.1	12	1
BSC	97.0	97.0	1.0	10	1
BDTHAI	9.3	9.3	0.9	100	1
SUNLIFEINS	65.0	65.0	0.9	14	1
Total			188.3		86

Important DSE News
BDSERVICE

The company has informed that the Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 24.12.2024, Time: 06:00 PM, Venue: InterContinental Dhaka. Record Date: 09.12.2024. The Company has also reported EPS of Tk. (8.03), NAV per share with revaluation of Tk. 228.26, NAV per share without revaluation of Tk. (51.36) and NOCFPS of Tk. 11.03 for the year ended June 30, 2024 as against Tk. (8.77), Tk. 236.29 (restated), Tk. (43.33) (restated) and Tk. (1.75) respectively for the year ended June 30, 2023. The company has further informed that during the year ended on June 30, 2022 the Company has changed the measurement basis of land portfolio from cost to revaluation model and based on an independent valuer's report net revaluation gain of Tk. 27,343,762,067.00 has been recognized in the financial statements of the said year.

(Q1 Un-audited): EPS was Tk. (3.06) for July-September 2024 as against Tk. (2.03) for July-September 2023; NOCFPS was Tk. 0.58 for July-September 2024 as against Tk. 0.07 for July-September 2023. NAV per share with revaluation was Tk. 225.20 as on September 30, 2024 and Tk. 228.26 as on June 30, 2024; NAV per share without revaluation was Tk. (54.42) as on September 30, 2024 and Tk. (51.36) as on June 30, 2024.

BDTHAIFOOD

The Board of Directors has recommended 1% Final Cash Dividend which was paid earlier as Interim Cash Dividend to the shareholders other than Sponsors and Directors for the year ended June 30, 2024. Date of AGM: 24.12.2024, Time: 11:00 AM, Venue: Trust Milonayaton, 545, Old Airport Road, Dhaka Cantonment, Dhaka 1206, Bangladesh. Record Date: 09.12.2024. The Company has also reported EPS of Tk. 0.02, NAV per share of Tk. 14.09 and NOCFPS of Tk. 0.65 for the year ended June 30, 2024 as against Tk. 0.17, Tk. 14.14 and Tk. 0.18 respectively for the year ended June 30, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DESCO	0.0%	0%		Record Date	21-Nov-24
SQUARETEXT	0.0%	32%		Record Date	21-Nov-24
SQURPHARMA	0.0%	110%		Record Date	21-Nov-24
COPPERTECH	0.0%	4%		Record Date	21-Nov-24
OAL	0.0%	0%		Record Date	21-Nov-24
ZAHEENSPIN	0.0%	0%		Record Date	21-Nov-24
SALVOCHEM	0.0%	3%		Record Date	21-Nov-24
ALIF	0.0%	10%		Record Date	21-Nov-24
MEGCONMILK	0.0%	0%		Record Date	21-Nov-24
METROSPIN	0.0%	0%		Record Date	21-Nov-24
MEGHNAPEP	0.0%	0%		Record Date	21-Nov-24
USMANIAGL	0.0%	0%		Record Date	21-Nov-24
HWAWELLTEX	0.0%	20%		Record Date	21-Nov-24
AIL	0.0%	10%		Record Date	21-Nov-24
LRBDL	0.0%	1%		Record Date	21-Nov-24

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