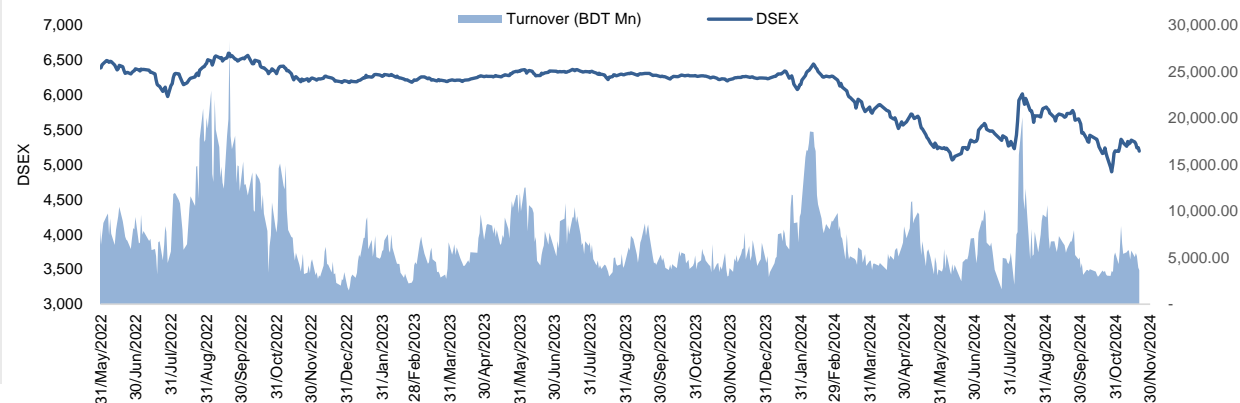


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.91%) lost 47.68 points and closed at 5,197.58. The blue-chip index DS30 (-0.81%), the Shariah-based index DSES (-0.94%), and the large-cap index CDSET (-0.89%) closed at 1,919.05, 1,151.56, and 1,060.55 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 4.58% followed by Telecommunication (-1.09%), Food & Allied (-0.88%), Fuel & Power (-0.80%), Engineering (-0.68%), Pharmaceutical (-0.65%), and Bank (-0.47%), respectively. Block trades contributed 8.5% of the overall market turnover. Midland Bank Limited (+5.7%) was the most traded share with a turnover of BDT 132 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,197.58	5,245.26	-47.68	-0.91%	-16.8%
DS30	1,919.05	1,934.64	-15.59	-0.81%	-8.3%
DSES	1,151.56	1,162.52	-10.97	-0.94%	-15.6%
CDSET	1,060.55	1,070.03	-9.48	-0.89%	-11.8%

	Advanced	Declined	Unchanged	Total
All Category	66	263	54	383
A Category (Equity)	35	164	29	228
B Category (Equity)	14	52	11	77
N Category (Equity)	0	4	0	4
Z Category (Equity)	17	43	14	74
Mutual Funds	3	14	20	37
Corporate Bonds	1	1	1	3
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,627,191	6,656,039	-0.4%
	Mn USD	55,227	55,467	
Turnover	Mn BDT	3,638	3,931	-7.4%
	Mn USD	30	33	
Volume	Mn Shares	130	127	+2.8%
No. of Trade		130,506	138,600	-5.8%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 21, 2024

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Figure: Sectorial Turnover (BDT Mn)

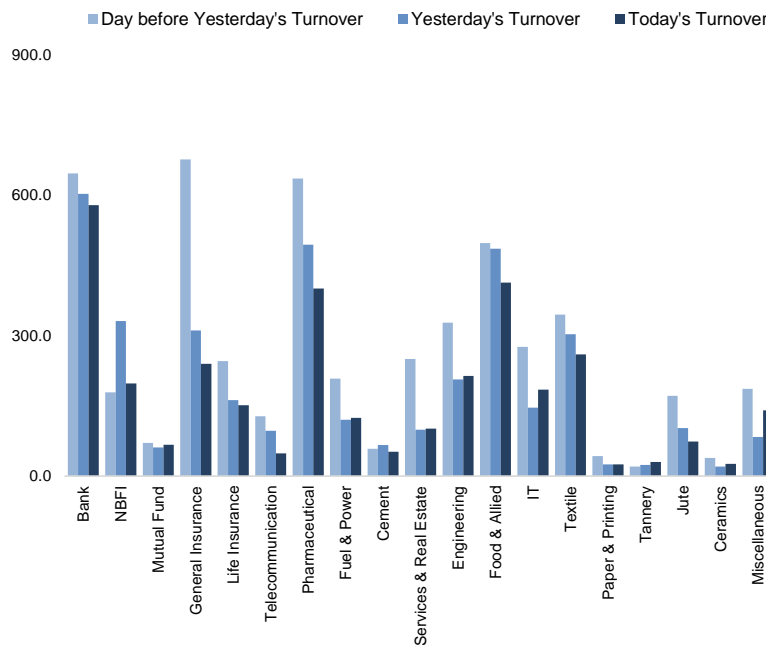
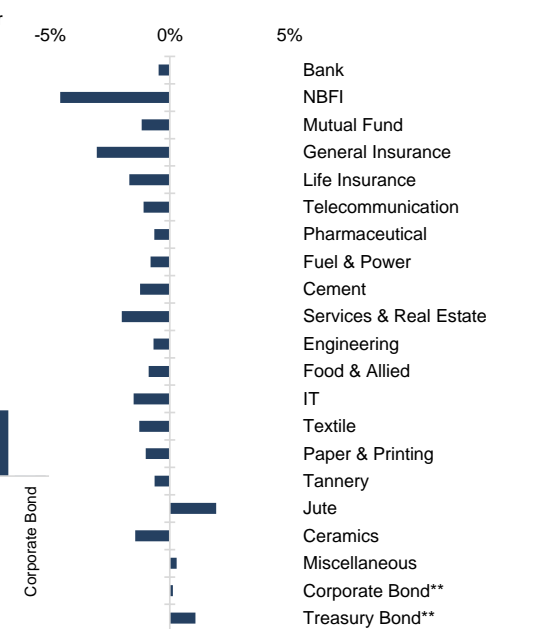


Figure: Sectorial Mcap Change



Market PE 14.9x
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	1,450	1,456	-6.85	-0.47%	36	685,884	10.4%	578.5	17.4%	8.7x	0.7x	GP	429,665	11.9%	30.0	12.1x	7.4x
NBFI	1,287	1,349	-61.71	-4.58%	23	122,628	1.9%	197.8	5.9%	NM	NM	SQURPHARMA	196,615	5.5%	0.0	9.4x	1.5x
Mutual Fund	595	602	-7.07	-1.17%	37	27,366	0.4%	67.0	2.0%	NM	0.5x	BATBC	194,400	5.4%	32.9	11.1x	3.2x
General Insurance	2,855	2,945	-89.71	-3.05%	43	81,513	1.2%	239.9	7.2%	14.8x	1.2x	WALTONHIL	147,526	4.1%	3.9	11.3x	1.3x
Life Insurance	1,965	1,998	-33.72	-1.69%	15	52,254	0.8%	151.2	4.5%	NM	NM	ROBI	135,662	3.8%	15.1	24.7x	2.1x
Telecommunication	5,001	5,056	-55.08	-1.09%	3	586,445	8.8%	48.7	1.5%	13.9x	4.2x	BEXIMCO	103,842	2.9%	0.0	NM	1.3x
Pharmaceutical	2,937	2,956	-19.08	-0.65%	34	556,788	8.4%	400.6	12.0%	14.2x	1.5x	BRACBANK	87,778	2.4%	24.5	7.9x	1.2x
Fuel & Power	1,133	1,143	-9.20	-0.80%	23	300,063	4.5%	124.3	3.7%	14.6x	0.6x	ISLAMIBANK	85,330	2.4%	71.2	18.3x	1.2x
Cement	1,998	2,023	-25.19	-1.25%	7	95,203	1.4%	51.8	1.6%	16.0x	2.0x	BERGERPBL	81,644	2.3%	1.6	24.5x	5.1x
Services & Real Estate	1,033	1,054	-21.12	-2.00%	9	56,796	0.9%	101.1	3.0%	18.9x	0.4x	UPGDCL	75,824	2.1%	3.0	7.3x	2.0x
Engineering	2,489	2,506	-17.13	-0.68%	42	280,816	4.2%	213.9	6.4%	12.3x	0.9x	MARICO	72,837	2.0%	2.0	13.7x	9.6x
Food & Allied	16,987	17,137	-150.27	-0.88%	21	310,812	4.7%	413.1	12.4%	16.6x	4.4x	LHB	62,482	1.7%	8.0	15.5x	3.1x
IT	2,000	2,030	-30.58	-1.51%	11	26,375	0.4%	184.7	5.5%	19.5x	1.7x	ICB	59,060	1.6%	95.6	NM	1.3x
Textile	1,079	1,093	-13.89	-1.27%	58	112,048	1.7%	259.6	7.8%	88.8x	0.7x	UNILEVERCL	50,414	1.4%	0.0	68.6x	21.5x
Paper & Printing	4,054	4,095	-41.08	-1.00%	6	18,317	0.3%	24.7	0.7%	NM	0.8x	DUTCHBANGL	41,129	1.1%	1.3	6.6x	0.8x
Tannery	1,960	1,973	-12.59	-0.64%	6	21,838	0.3%	30.3	0.9%	66.9x	1.5x	BXPHERMA	35,600	1.0%	97.0	5.9x	0.7x
Jute	15,664	15,366	+297.68	+1.94%	3	3,448	0.1%	73.7	2.2%	NM	NM	POWERGRID	35,456	1.0%	7.1	NM	0.2x
Ceramics	353	358	-5.17	-1.44%	5	15,838	0.2%	26.2	0.8%	NM	1.0x	EBL	32,052	0.9%	93.1	4.9x	0.7x
Miscellaneous	4,202	4,191	+11.79	+0.28%	15	228,201	3.4%	140.6	4.2%	40.6x	1.8x	PUBALIBANK	31,929	0.9%	3.8	3.3x	0.6x
Corporate Bond**	11,352	11,338	+14.03	+0.12%	16	34,330	0.5%	0.5	0.0%	NM	NM	OLYMPIC	30,711	0.9%	12.9	16.7x	2.7x
Treasury Bond**	467	462	+4.95	+1.07%	237	3,009,752	45.4%	0.1	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JUTESPINN	243.6	+8.7%	0.7	NM	NM
TUNGHAI	3.2	+6.7%	0.3	NM	NM
KPCL	13.7	+6.2%	12.6	NM	0.7x
KBPPWBIL	154.5	+6.0%	48.0	NM	13.0x
MIDLANDBNK	35.5	+5.7%	131.5	20.5x	2.5x
MITHUNKNIT	14.9	+4.93%	1.6	NM	4.7x
SHYAMPUSUG	109.9	+4.8%	2.2	NM	NM
CNATEX	5.1	+4.1%	18.1	NM	NM
QUEENSOUTH	13.0	+4.0%	19.4	41.9x	0.8x
NORTHERN	122.9	+3.7%	0.3	NM	1.5x

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%	11.1x	3.2x
RENATA	35,002	2.6%	23.0x	2.1x
ISLAMIBANK	33,649	2.5%	18.3x	1.2x
BXPHERMA	32,479	2.4%	5.9x	0.7x
BRACBANK	32,157	2.4%	7.9x	1.2x
GP	30,004	2.2%	12.1x	7.4x
LHB	24,690	1.8%	15.5x	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	2.7x
CITYBANK	16,830	1.2%	4.0x	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%	16.7x	2.7x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	44.0x	0.4x
ROBI	10,738	0.8%	24.7x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIDLANDBNK	35.5	+5.7%	131.5	20.5x	2.5x
LOVELLO	90.4	+3.7%	116.5	49.2x	7.0x
BXPHERMA	79.8	-3.2%	97.0	5.9x	0.7x
ICB	68.1	-6.3%	95.6	NM	1.3x
EBL	23.6	-0.8%	93.1	4.9x	0.7x
FINEFOODS	214.2	-0.3%	92.1	NM	18.0x
AGNISYSL	25.8	-5.8%	83.9	24.1x	1.6x
SONALIANSH	255.4	+0.8%	72.7	79.1x	4.1x
FEKDIL	18.6	-4.1%	72.7	8.5x	0.9x
ISLAMIBANK	53.0	-2.6%	71.2	18.3x	1.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
1STPRIMFMF	38.8	-9.8%	30.8	NM	3.7x
DOREENPWR	23.6	-9.6%	17.4	15.8x	0x
SPCERAMICS	12.0	-8.4%	17.7	NM	0.4x
EMERALDOIL	24.9	-8.1%	48.4	19.2x	NM
TILIL	36.4	-6.9%	7.4	19.2x	NM
AGRANINS	25.4	-6.6%	5.3	14.1x	1.3x
ICB	68.1	-6.3%	95.6	NM	1.3x
SHASHADNIM	19.9	-6.1%	3.5	10.5x	0.5x
AGNISYSL	25.8	-5.8%	83.9	24.1x	1.6x
PHENIXINS	26.3	-5.7%	3.3	25.3x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PRIMEBANK	24.0	24.0	1.0	5,000	120.00
MIDLANDBNK	33.9	32.0	13.0	1,099	36.39
EBL	23.8	23.8	5.0	1,450	34.51
BEACHHATCH	99.9	93.0	7.0	320	30.97
RELIANCE1	17.5	16.5	8.0	1,371	22.84
LOVELLO	87.5	86.0	8.0	193	16.73
QUASEMIND	28.0	28.0	2.0	317	8.88
POPULARLIF	58.6	58.6	3.0	117	6.85
NATLIFEINS	133.2	133.2	1.0	45	5.99
MJLBD	96.0	96.0	4.0	42	4.03

* 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
PRIMEBANK	24.0	24.0	120.0	5,000	1
MIDLANDBNK	33.9	32.0	36.4	1,099	13
EBL	23.8	23.8	34.5	1,450	5
BEACHHATCH	99.9	93.0	31.0	320	7
RELIANCE1	17.5	16.5	22.8	1,371	8
LOVELLO	87.5	86.0	16.7	193	8
QUASEMIND	28.0	28.0	8.9	317	2
POPULARLIF	58.6	58.6	6.8	117	3
NATLIFEINS	133.2	133.2	6.0	45	1
MJLBD	96.0	96.0	4.0	42	4
FINEFOODS	197.3	196.1	3.7	19	3
PARAMOUNT	48.1	48.1	3.4	70	1
SHYAMPSUG	106.0	105.5	2.7	26	2
CENTRALINS	49.0	49.0	2.3	47	2
TILIL	41.0	40.6	1.7	42	2
NHFIL	29.7	29.7	1.6	55	1
KAY&QUE	245.9	206.5	1.2	5	2
KAY&QUE	245.9	206.5	1.2	5	2
LINDEBD	897.0	897.0	0.7	1	1
NTC	216.0	216.0	0.7	3	1
IPDC	18.3	18.3	0.6	35	1
SIBL	9.6	9.6	0.6	59	1
Total			309.7		75

Important DSE News
DSHGARME

(Q1 Un-audited): EPS was Tk. 0.10 for July-September 2024 as against Tk. 0.02 for July-September 2023; NOCFPS was Tk. (1.80) for July-September 2024 as against Tk. 0.30 for July-September 2023. NAV per share was Tk. 18.53 as on September 30, 2024 and Tk. 18.44 as on June 30, 2024.

GHCL

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 30.12.2024, Time: 10:30 AM, Venue: Hybrid System and GHCL Factory premises, Hasnabad, Keranigonj, Dhaka. Record Date: 12.12.2024. The Company has also reported EPS of Tk. (7.58), NAV per share of Tk. 74.08 and NOCFPS of Tk. 2.42 for the year ended June 30, 2024 as against Tk. (5.77), Tk. 47.85 and Tk. (2.45) respectively for the year ended June 30, 2023.

FINEFOODS

(Q1 Un-audited): EPS was Tk. 0.621 for July-September 2024 as against Tk. 0.018 for July-September 2023; NOCFPS was Tk. 0.19 for July-September 2024 as against Tk. (0.049) for July-September 2023. NAV per share was Tk. 11.93 as on September 30, 2024 and Tk.10.57 as on September 30, 2023.

APEXTANRY

The company has informed that the Board of Directors has appointed Mr. Syed Nasim Manzur as the Chairman and Acting Managing Director of the company with effect from November 20, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
AZIZPIPES		0.0%	0%	Record Date	22-Nov-24
ARGONDENIM		0.0%	10%	Record Date	24-Nov-24
ETL		0.0%	3%	Record Date	24-Nov-24
SEAPEARL		0.0%	7%	Record Date	24-Nov-24
GHAIL		0.0%	1%	Record Date	24-Nov-24
BENGALWTL		0.0%	5%	Record Date	24-Nov-24
SIMTEX		0.0%	10%	Record Date	24-Nov-24
BSC		0.0%	25%	Record Date	24-Nov-24
STYLECRAFT		0.0%	0%	Record Date	25-Nov-24
BXPHERMA		0.0%	40%	Record Date	25-Nov-24
BEXIMCO		5.0%	0%	Record Date	25-Nov-24
SPCERAMICS		0.0%	2%	Record Date	25-Nov-24
JHRML		0.0%	10%	Record Date	26-Nov-24
AMANFEED		0.0%	10%	Record Date	27-Nov-24
MHSML		0.0%	3%	Record Date	27-Nov-24

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