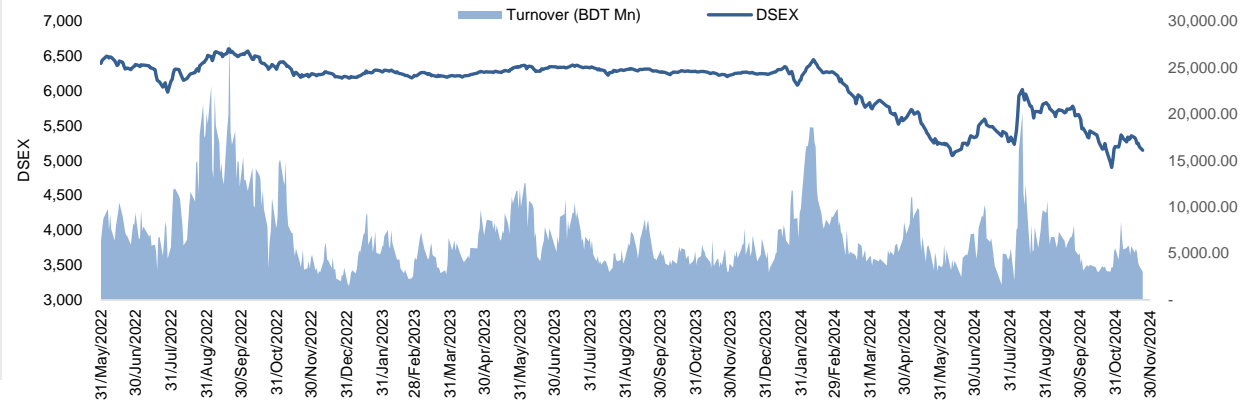


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.98%) lost 51.08 points and closed at 5,146.50. The blue-chip index DS30 (-1.00%), the Shariah-based index DSES (-0.18%), and the large-cap index CDSET (-1.16%) closed at 1,899.90, 1,149.43, and 1,048.20 points, respectively. All the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 1.79% followed by Food & Allied (-0.76%), Bank (-0.54%), NBF (I) (-0.52%), Telecommunication (-0.37%), Engineering (-0.26%), and Fuel & Power (-0.14%), respectively. Block trades contributed 4.6% of the overall market turnover. NRB Bank Limited (+4.8%) was the most traded share with a turnover of BDT 150 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,146.50	5,197.58	-51.08	-0.98%	-17.6%
DS30	1,899.90	1,919.05	-19.15	-1.00%	-9.3%
DSES	1,149.43	1,151.56	-2.12	-0.18%	-15.7%
CDSET	1,048.20	1,060.55	-12.35	-1.16%	-12.9%

	Advanced	Declined	Unchanged	Total
All Category	110	228	54	392
A Category (Equity)	67	132	28	227
B Category (Equity)	19	46	14	79
N Category (Equity)	3	2	0	5
Z Category (Equity)	21	48	12	81
Mutual Funds	7	18	12	37
Corporate Bonds	1	1	1	3
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,607,439	6,627,191	-0.3%
Mn USD	55,062	55,227	
Turnover			
Mn BDT	3,021	3,638	
Mn USD	25	30	-17.0%
Volume			
Mn Shares	112	130	-13.9%
No. of Trade	114,629	130,506	-12.2%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 24, 2024

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Figure: Sectorial Turnover (BDT Mn)

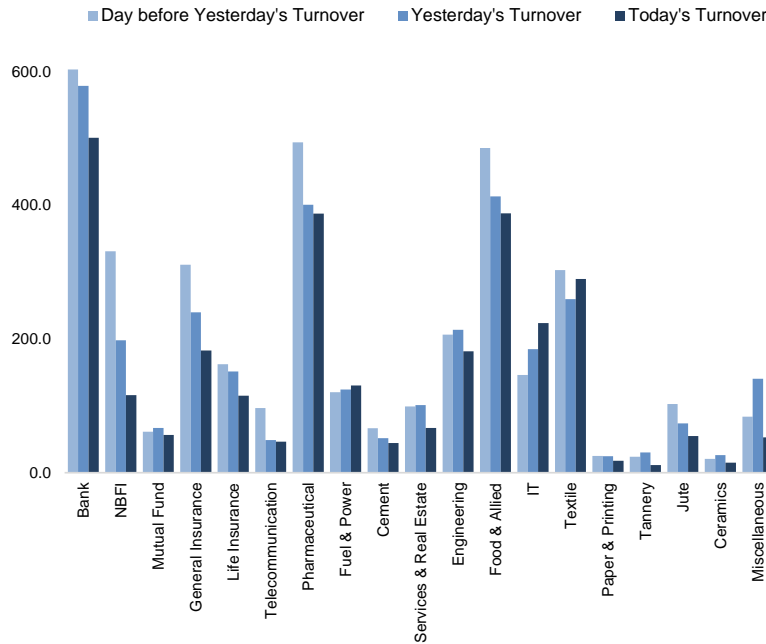
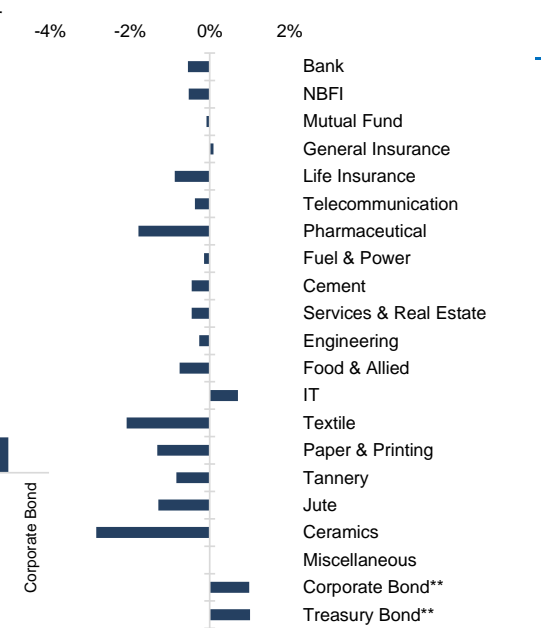


Figure: Sectorial Mcap Change



Market PE 14.8x
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	1,442	1,450	-7.87	-0.54%	36	682,162	10.3%	500.8	17.4%	8.7x	0.7x	GP	429,125	12.0%	24.0	12.1x	7.4x
NBFI	1,280	1,287	-6.73	-0.52%	23	121,987	1.8%	116.1	4.0%	NM	NM	BATBC	191,808	5.4%	18.2	10.9x	3.1x
Mutual Fund	595	595	-0.49	-0.08%	37	27,344	0.4%	56.3	2.0%	NM	0.5x	SQURPHARMA	187,307	5.2%	72.7	8.9x	1.4x
General Insurance	2,858	2,855	+2.61	+0.09%	43	81,588	1.2%	182.7	6.3%	14.8x	1.2x	WALTONHIL	147,253	4.1%	4.1	11.3x	1.3x
Life Insurance	1,947	1,965	-17.22	-0.88%	15	51,796	0.8%	115.1	4.0%	NM	NM	ROBI	133,567	3.7%	18.4	24.3x	2.0x
Telecommunication	4,983	5,001	-18.65	-0.37%	3	584,258	8.8%	46.3	1.6%	13.8x	4.1x	BEXIMCO	103,842	2.9%	0.0	NM	1.3x
Pharmaceutical	2,885	2,937	-52.43	-1.79%	34	546,849	8.3%	387.3	13.4%	13.9x	1.5x	BRACBANK	86,185	2.4%	41.9	7.8x	1.1x
Fuel & Power	1,132	1,133	-1.58	-0.14%	23	299,645	4.5%	130.6	4.5%	14.8x	0.6x	ISLAMIBANK	85,008	2.4%	34.6	18.2x	1.2x
Cement	1,989	1,998	-9.01	-0.45%	7	94,774	1.4%	44.5	1.5%	15.9x	2.0x	BERGERPBL	81,931	2.3%	0.3	24.6x	5.2x
Services & Real Estate	1,028	1,033	-4.67	-0.45%	9	56,539	0.9%	67.1	2.3%	18.8x	0.4x	UPGDCL	75,650	2.1%	4.7	7.2x	2.0x
Engineering	2,483	2,489	-6.55	-0.26%	42	280,077	4.2%	181.3	6.3%	12.2x	0.8x	RENATA	72,637	2.0%	3.1	22.8x	2.1x
Food & Allied	16,858	16,987	-128.66	-0.76%	21	308,458	4.7%	387.8	13.5%	16.5x	4.4x	LHB	62,133	1.7%	14.8	15.4x	3.1x
IT	2,014	2,000	+14.15	+0.71%	11	26,561	0.4%	223.8	7.8%	19.7x	1.7x	ICB	59,321	1.7%	43.9	NM	1.3x
Textile	1,057	1,079	-22.50	-2.08%	58	109,712	1.7%	289.5	10.0%	86.9x	0.7x	UNILEVERCL	50,711	1.4%	0.2	69.0x	21.6x
Paper & Printing	4,001	4,054	-53.20	-1.31%	6	18,077	0.3%	17.7	0.6%	NM	0.8x	DUTCHBANGL	41,305	1.2%	0.9	6.6x	0.8x
Tannery	1,944	1,960	-16.41	-0.84%	6	21,656	0.3%	11.5	0.4%	66.3x	1.5x	BXPHERMA	36,090	1.0%	81.4	6.0x	0.7x
Jute	15,462	15,664	-201.34	-1.29%	3	3,404	0.1%	54.8	1.9%	NM	NM	POWERGRID	35,730	1.0%	2.9	NM	0.2x
Ceramics	343	353	-10.03	-2.84%	5	15,388	0.2%	15.2	0.5%	NM	0.9x	PUBALIBANK	31,697	0.9%	8.7	3.3x	0.6x
Miscellaneous	4,203	4,202	+0.35	+0.01%	15	228,220	3.5%	52.7	1.8%	41.1x	1.8x	EBL	31,645	0.9%	43.7	4.8x	0.7x
Corporate Bond**	11,464	11,352	+112.28	+0.99%	16	34,350	0.5%	0.3	0.0%	NM	NM	OLYMPIC	30,851	0.9%	4.6	16.8x	2.7x
Treasury Bond**	471	467	+4.71	+1.01%	237	3,013,721	45.6%	0.2	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	120.8	+9.9%	8.2	NM	NM
DOREENPWR	25.9	+9.7%	17.5	17.4x	0.5x
ZEALBANGLA	109.3	+9.3%	1.3	NM	NM
HAMI	81.2	+8.1%	3.4	NM	8.9x
VAMLBDMF1	5.8	+7.4%	0.0	NM	0.5x
RELIANCE1	19.7	+5.91%	24.3	NM	1.8x
GENEXIL	28.9	+5.9%	88.8	11.6x	1x
AL-HAJTEX	112.8	+5.8%	12.0	NM	12.4x
NTLTUBES	77.9	+5.3%	32.4	35.1x	0.6x
ACFL	18.9	+5.0%	4.3	NM	0.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EPGL	12.3	-14.0%	6.5	NM	0.3x
GHCL	22.0	-9.8%	11.6	NM	0x
SQUARETEXT	48.8	-9.5%	6.2	8.1x	0.9x
PHOENIXFIN	4.1	-8.9%	2.7	NM	NM
BDWELDING	9.7	-7.6%	0.9	NM	0.8x
AIL	89.7	-7.0%	76.1	34.5x	3.5x
TAMIJTEX	107.0	-6.7%	2.8	16.0x	1.1x
NEWLINE	12.1	-6.2%	0.8	23.3x	0.5x
BDFINANCE	12.4	-6.1%	7.8	NM	1.2x
ZAHINTEX	4.7	-6.0%	0.3	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	8.9x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	22.8x	2.1x
ISLAMIBANK	33,649	2.5%	18.2x	1.2x
BXPHERMA	32,479	2.4%	6.0x	0.7x
BRACBANK	32,157	2.4%	7.8x	1.1x
GP	30,004	2.2%	12.1x	7.4x
LHB	24,690	1.8%	15.4x	3.1x
EBL	24,199	1.8%	4.8x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.0x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	12.6x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.8x	2.7x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	44.8x	0.4x
ROBI	10,738	0.8%	24.3x	2.0x

* 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
NRBBANK	13.0	+4.8%	150.0	21.4x	1.0x
LOVELLO	89.7	-0.8%	122.1	48.8x	6.9x
FINEFOODS	206.2	-3.7%	91.7	NM	17.3x
GENEXIL	28.9	+5.9%	88.8	11.6x	1.4x
BEACHHATCH	97.1	-0.5%	85.5	50.3x	7.8x
BXPHERMA	80.9	+1.4%	81.4	6.0x	0.7x
AIL	89.7	-7.0%	76.1	34.5x	3.5x
SQURPHARMA	211.3	-4.7%	72.7	8.9x	1.4x
AGNISYSL	26.6	+3.1%	68.4	24.9x	1.6x
SONALIANS	251.6	-1.5%	50.8	77.9x	4.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ALARABANK	19.4	19.4	1.0	1,120	21.73
LOVELLO	97.6	84.0	6.0	209	18.18
UNITEDFIN	14.0	14.0	1.0	1,200	16.80
EIL	56.6	56.2	5.0	225	12.67
EBL	23.6	23.1	3.0	500	11.71
SONALILIFE	58.8	58.8	2.0	167	9.82
AIL	90.5	90.5	3.0	65	5.88
FUWANGFOOD	11.3	11.3	1.0	350	3.96
RELIANCE1	19.4	18.0	3.0	185	3.48
KBPPWBIL	142.0	140.4	5.0	23	3.30

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ALARABANK	19.4	19.4	21.7	1,120	1
LOVELLO	97.6	84.0	18.2	209	6
UNITEDFIN	14.0	14.0	16.8	1,200	1
EIL	56.6	56.2	12.7	225	5
EBL	23.6	23.1	11.7	500	3
SONALILIFE	58.8	58.8	9.8	167	2
AIL	90.5	90.5	5.9	65	3
FUWANGFOOD	11.3	11.3	4.0	350	1
RELIANCE1	19.4	18.0	3.5	185	3
KBPPWBIL	142.0	140.4	3.3	23	5
FBFIF	3.3	3.3	3.3	1,000	1
BEACHHATCH	92.1	91.4	3.3	36	3
MIDLANDBNK	32.0	32.0	3.1	97	2
CNATEX	4.6	4.6	3.0	660	1
CENTRALINS	51.0	51.0	2.6	50	1
BEXIMCO	126.6	104.1	2.5	23	4
JAMUNAOIL	185.0	185.0	1.9	10	1
JAMUNAOIL	185.0	185.0	1.9	10	1
AL-HAJTEX	107.5	107.5	1.6	15	1
IPDC	18.0	18.0	0.9	50	1
GP	295.0	295.0	0.9	3	1
IFIC	7.9	7.9	0.8	105	1
Total			138.9		57

Important DSE News
SKTRIMS

The Board of Directors has recommended 1.75% cash dividend (All Shareholders) for the year ended June 30, 2024. Date of AGM: 29.12.2024, Time: 11:30 AM, Venue: Hybrid System; Details will be notified through AGM notice later. Record date: 12.12.2024. The Company has also reported EPS of Tk. 0.54, NAV per share of Tk. 15.65 and NOCFPS of Tk. 0.90 for the year ended June 30, 2024 as against Tk. 0.94, Tk. 15.57 and Tk. 0.11 respectively for the year ended June 30, 2023.

SILCOPHL

(Q1 Un-audited): EPS was Tk. 0.17 for July-September 2024 as against Tk. 0.11 for July-September 2023; NOCFPS was Tk. 0.24 for July-September 2024 as against Tk. 0.16 for July-September 2023. NAV per share was Tk. 22.84 as on September 30, 2024 and Tk. 22.66 as on June 30, 2024.

EPGL

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 22.12.2024, Time: 11:00 AM, Venue: Hybrid Platform and at RAOVA Convention Hall, Mohakhali DOHS, Dhaka. Record Date: 15.12.2024. The Company has also reported EPS of Tk. (5.18), NAV per share with revaluation of Tk. 37.45, NAV per share without revaluation of Tk. 25.55 and NOCFPS of Tk. 3.97 for the year ended June 30, 2024 as against Tk. 0.75, Tk. 43.18, Tk. 31.28 and Tk. 3.15 respectively for the year ended June 30, 2023.

JANATAINS

(Q3 Un-audited): EPS was Tk. 0.30 for July-September 2024 as against Tk. 0.17 for July-September 2023; EPS was Tk. 1.48 for January-September 2024 as against Tk. 1.31 for January-September 2023. NOCFPS was Tk. 0.93 for January-September 2024 as against Tk. 2.19 for January-September 2023. NAV per share was Tk. 15.19 as on September 30, 2024 and Tk. 14.69 as on December 31, 2023.

GLOBALINS

(Q3 Un-audited): EPS was Tk. 0.30 for July-September 2024 as against Tk. 0.34 for July-September 2023; EPS was Tk. 0.95 for January-September 2024 as against Tk. 0.94 for January-September 2023. NOCFPS was Tk. 0.12 for January-September 2024 as against Tk. 0.57 for January-September 2023. NAV per share was Tk. 14.91 as on September 30, 2024 and Tk. 13.52 as on September 30, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ACFL		0.0%	10%	Record Date	27-Nov-24
GBBPOWER		0.0%	0%	Record Date	27-Nov-24
CENTRALPHL		0.0%	0%	Record Date	27-Nov-24
SINOBANGLA		0.0%	10%	Record Date	28-Nov-24
FORTUNE		0.0%	1%	Record Date	28-Nov-24
HFL		0.0%	0%	Record Date	28-Nov-24
WATACHEM		0.0%	12%	Record Date	28-Nov-24
QUEENSOUTH		0.0%	2%	Record Date	28-Nov-24

GSPFINANCE

The Board of Directors has recommended No Dividend for the year ended December 31, 2023. Date of AGM: 29.12.2024, Time: 11:30 AM, Venue: Raowa Convention Hall - 1 (Helmet Hall), VIP Road, Mohakhali, Dhaka and Online Platform. Record Date: 12.12.2024. The Company has also reported Consolidated EPS of Tk. (9.73), Consolidated NAV per share of Tk. 18.05 and Consolidated NOCFPS of Tk. (1.69) for the year ended December 31, 2023 as against Tk. (1.08), Tk. 27.78 and Tk. (1.15) respectively for the year ended December 31, 2022.

RENATA

The company has informed that the Board of Directors of the Company has decided to issue Non-Cumulative, Non-Participative, Redeemable or Fully Convertible Preference Shares - At the Issuer's Discretion amounting up to BDT 3,250 million to refinance the existing loans subject to approval from the shareholders of the Company in Extra-Ordinary General Meeting to be held on January 12, 2025 and Bangladesh Securities and Exchange Commission. The 'Record Date' for EGM on Thursday, December 12, 2024.

AL-HAJTEX

The company has informed that the disputes regarding the directors of the company has been resolved and all the directors have reached at negotiation. The company has also reconstructed its Board as per BSEC letter no. BSEC/ICAD/SRIC/2023/291/(Part-5)/250 dated November 17, 2024 and appointed the following individuals in the Board (Name and Designation): 1. Mr. Md. Bakhtiar Rahman, Chairman (Acting); 2. Mr. Md. Mizanur Rahman, Managing Director & CEO (Acting); 3. Mr. Md. Harunoor Rashid, Director; 4. Mr. Md. Abdullah Bokhari, Director; 5. Mr. Md. Talha, Director; 6. Mr. Md. Saidul Islam, Director; 7. Ms. Khodeza Khatoon, Director; 8. Mr. Md. Joynul Abedin Chowdhury, Director

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