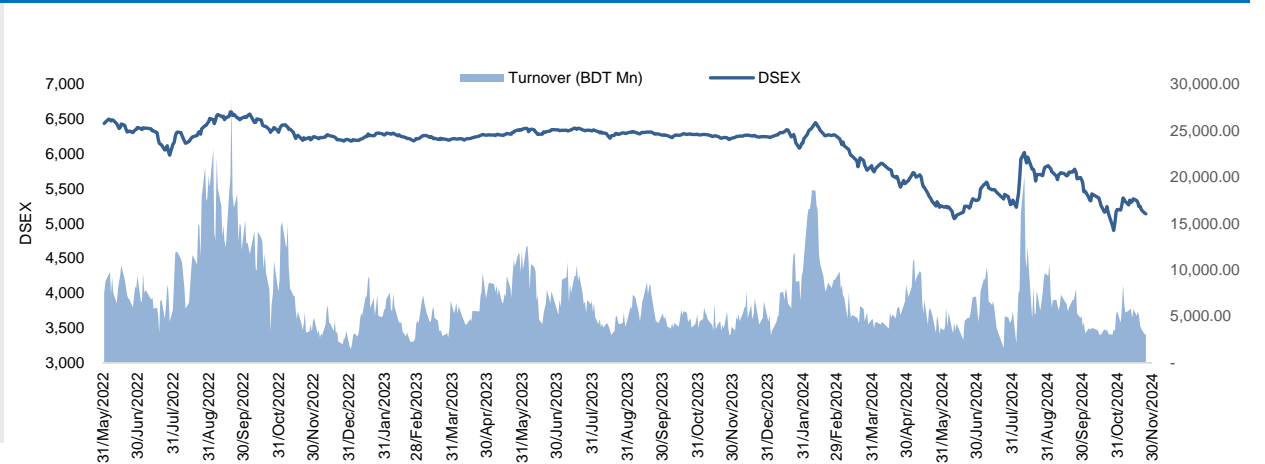


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 10.37 points and closed at 5,136.13. The blue-chip index DS30 (-0.17%), the Shariah-based index DSES (-0.17%), and the large-cap index CDSET (-0.20%) closed at 1,896.74, 1,147.49, and 1,046.15 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 1.47%, followed by NBF1 (+1.40%), Food & Allied (+0.50%), Engineering (-0.22%), Bank (-0.39%), Pharmaceutical (-0.53%), and Telecommunication (-0.71%), respectively. Block trades contributed 5.2% of the overall market turnover. Bangladesh Shipping Corporation (+1.0%) was the most traded share with a turnover of BDT 149 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,136.13	5,146.50	-10.37	-0.20%	-17.8%
DS30	1,896.74	1,899.90	-3.16	-0.17%	-9.4%
DSES	1,147.49	1,149.43	-1.95	-0.17%	-15.9%
CDSET	1,046.15	1,048.20	-2.05	-0.20%	-13.0%

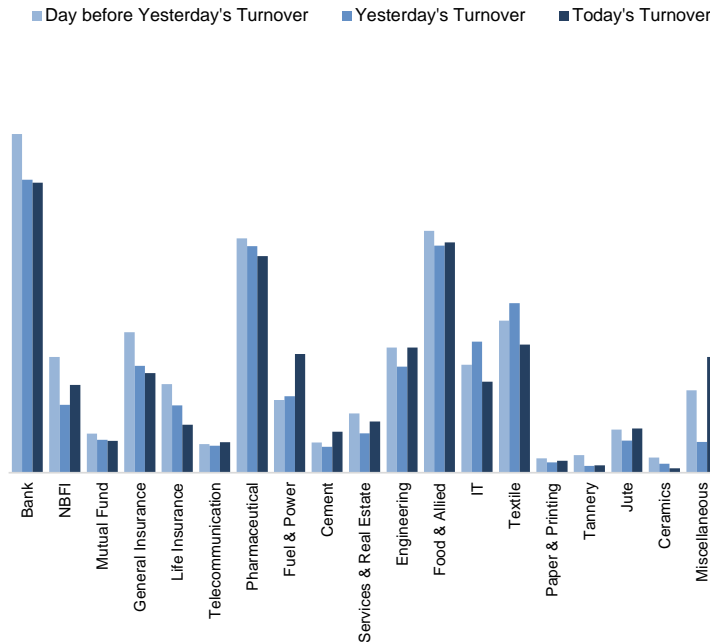
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	148	163	83	394
<b>A Category (Equity)</b>	92	92	45	229
<b>B Category (Equity)</b>	28	35	17	80
<b>N Category (Equity)</b>	2	0	2	4
<b>Z Category (Equity)</b>	26	36	19	81
<b>Mutual Funds</b>	11	9	17	37
<b>Corporate Bonds</b>	2	0	1	3
<b>Treasury Bonds</b>	0	0	0	0

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,600,859	6,607,439	-0.1%
Mn USD	55,007	55,062	
<b>Turnover</b>			
Mn BDT	3,198	3,021	
Mn USD	27	25	+5.9%
<b>Volume</b>			
Mn Shares	112	112	-0.1%
<b>No. of Trade</b>	118,824	114,629	+3.7%

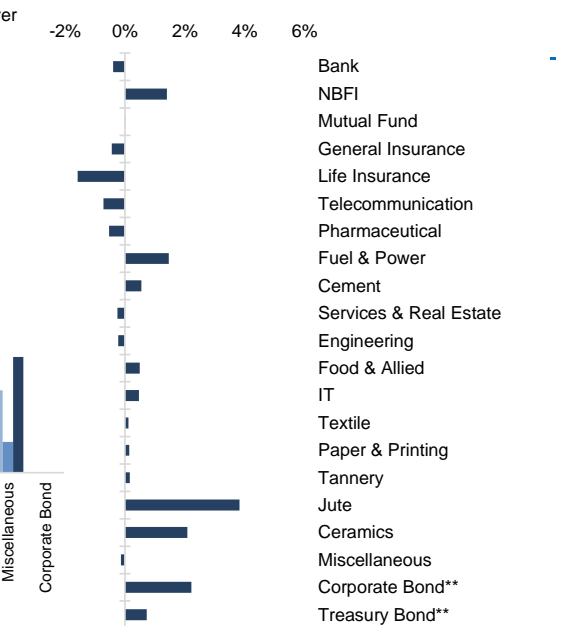
\* Average Interbank Exchange Rate is BDT 120.00 as of Nov 25, 2024

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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



Market PE 14.7x  
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	1,436	1,442	-5.67	-0.39%	36	679,480	10.3%	495.3	16.3%	8.7x	0.7x	GP	425,615	11.9%	30.9	12.0x	7.4x
NBFI	1,298	1,280	+17.90	+1.40%	23	123,692	1.9%	149.9	4.9%	NM	NM	BATBC	192,672	5.4%	12.0	11.0x	3.1x
Mutual Fund	595	595	+0.07	+0.01%	37	27,347	0.4%	54.6	1.8%	NM	0.5x	SQURPHARMA	184,648	5.2%	41.4	8.8x	1.4x
General Insurance	2,845	2,858	-12.57	-0.44%	43	81,229	1.2%	170.0	5.6%	14.7x	1.2x	WALTONHIL	146,193	4.1%	6.3	11.2x	1.3x
Life Insurance	1,917	1,947	-30.70	-1.58%	15	50,980	0.8%	82.2	2.7%	NM	NM	ROBI	133,043	3.7%	17.2	24.2x	2.0x
Telecommunication	4,947	4,983	-35.52	-0.71%	3	580,093	8.8%	52.4	1.7%	13.7x	4.1x	BEXIMCO	103,842	2.9%	0.0	NM	1.3x
Pharmaceutical	2,869	2,885	-15.24	-0.53%	34	543,960	8.2%	369.9	12.2%	13.8x	1.5x	ISLAMIBANK	85,491	2.4%	46.1	18.3x	1.2x
Fuel & Power	1,149	1,132	+16.61	+1.47%	23	304,042	4.6%	202.8	6.7%	15.0x	0.6x	BRACBANK	84,592	2.4%	55.2	7.6x	1.1x
Cement	2,000	1,989	+10.99	+0.55%	7	95,298	1.4%	70.0	2.3%	16.0x	2.0x	BERGERPBL	82,126	2.3%	0.3	24.7x	5.2x
Services & Real Estate	1,025	1,028	-2.55	-0.25%	9	56,399	0.9%	87.7	2.9%	18.8x	0.4x	UPGDCL	75,766	2.1%	3.4	7.3x	2.0x
Engineering	2,477	2,483	-5.44	-0.22%	42	279,464	4.2%	214.1	7.1%	12.2x	0.8x	RENATA	71,674	2.0%	6.7	22.5x	2.1x
Food & Allied	16,942	16,858	+83.93	+0.50%	21	309,993	4.7%	393.4	13.0%	16.6x	4.4x	LHB	62,250	1.7%	16.1	15.4x	3.1x
IT	2,023	2,014	+9.47	+0.47%	11	26,686	0.4%	155.4	5.1%	19.8x	1.7x	ICB	60,882	1.7%	88.8	31.3x	1.4x
Textile	1,058	1,057	+1.20	+0.11%	58	109,837	1.7%	219.0	7.2%	87.0x	0.7x	UNILEVERCL	50,950	1.4%	0.1	69.3x	21.7x
Paper & Printing	4,007	4,001	+5.79	+0.14%	6	18,103	0.3%	20.5	0.7%	NM	0.8x	DUTCHBANGL	41,305	1.2%	1.2	6.6x	0.8x
Tannery	1,947	1,944	+3.19	+0.16%	6	21,691	0.3%	12.6	0.4%	66.4x	1.5x	POWERGRID	39,111	1.1%	31.3	NM	0.2x
Jute	16,054	15,462	+591.50	+3.83%	3	3,534	0.1%	75.4	2.5%	NM	NM	BXPHARMA	36,090	1.0%	0.0	6.0x	0.7x
Ceramics	350	343	+7.15	+2.08%	5	15,709	0.2%	7.5	0.2%	NM	1.0x	PUBALIBANK	31,929	0.9%	5.5	3.3x	0.6x
Miscellaneous	4,197	4,203	-5.66	-0.13%	15	227,912	3.5%	198.0	6.5%	41.0x	1.8x	EBL	31,373	0.9%	46.1	4.8x	0.7x
Corporate Bond**	11,718	11,464	+254.62	+2.22%	16	34,790	0.5%	1.3	0.0%	NM	NM	OLYMPIC	31,110	0.9%	7.8	16.9x	2.8x
Treasury Bond**	475	471	+3.44	+0.73%	237	3,009,751	45.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ATLASBANG	56.4	+9.9%	0.5	NM	0.5x
EMERALDOIL	26.9	+9.8%	37.7	20.8x	NM
POWERGRID	42.8	+9.5%	31.3	NM	0.2x
JUTESPINN	265.6	+7.2%	3.3	NM	NM
ANWARGALV	67.0	+7.2%	9.5	90.5x	7.3x
ASIATICLAB	32.0	+6.31%	49.7	11.3x	0.6x
NTC	214.1	+6.1%	4.4	NM	NM
PREMIERLEA	3.5	+6.1%	0.0	NM	NM
INTRACO	17.7	+6.0%	39.0	21.3x	1.4x
PROVATIINS	35.0	+5.7%	18.3	24.0x	1.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GHCL	19.8	-10.0%	8.7	NM	0.3x
VAMLBDMF1	5.3	-8.6%	0.3	NM	0x
MIDLANDBNK	32.1	-7.5%	74.0	18.6x	2.2x
NEWLINE	11.2	-7.4%	0.8	21.5x	0.5x
SIMTEX	17.4	-7.0%	6.1	18.7x	0.8x
ARGONDENIM	16.8	-6.7%	7.1	18.5x	0.7x
SAFKOSPINN	7.9	-6.0%	0.5	NM	NM
ALLTEX	10.1	-4.7%	0.8	50.5x	0.5x
PRAGATILIF	147.9	-4.5%	4.7	NM	NM
KBPPWBIL	148.3	-4.3%	32.1	NM	12.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	8.8x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	11.0x	3.1x
RENATA	35,002	2.6%	22.5x	2.1x
ISLAMIBANK	33,649	2.5%	18.3x	1.2x
BXPHARMA	32,479	2.4%	6.0x	0.7x
BRACBANK	32,157	2.4%	7.6x	1.1x
GP	30,004	2.2%	12.0x	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%	12.7x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.9x	2.8x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	44.3x	0.4x
ROBI	10,738	0.8%	24.2x	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
BSC	92.2	+1.0%	148.8	4.9x	0.9x
LOVELLO	88.8	-1.0%	131.9	48.4x	6.8x
BEACHHATCH	98.8	+1.8%	100.7	51.2x	7.9x
ICB	70.2	+2.6%	88.8	31.3x	1.4x
MIDLANDBNK	32.1	-7.5%	74.0	18.6x	2.2x
SONALIANS	260.6	+3.6%	72.1	80.7x	4.2x
AGNISYS	25.7	-3.4%	56.3	24.0x	1.6x
FINEFOODS	201.1	-2.5%	55.7	NM	16.9x
FEKDIL	18.7	-0.5%	55.2	8.5x	0.9x
BRACBANK	47.8	-1.8%	55.2	7.6x	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EBL	23.3	22.8	27.0	3,177	73.31
AIL	97.5	82.0	9.0	318	29.28
BEACHHATCH	96.0	95.0	5.0	131	12.54
LOVELLO	86.0	86.0	3.0	120	10.32
RELIANCE1	21.5	18.7	8.0	372	7.07
QUASEMIND	26.5	26.5	1.0	200	5.30
FINEFOODS	190.5	190.0	2.0	20	3.81
CENTRALINS	49.0	49.0	2.0	50	2.45
GP	298.5	298.5	1.0	7	1.99
RUPALILIFE	107.0	95.0	2.0	20	1.97

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EBL	23.3	22.8	73.3	3,177	27
AIL	97.5	82.0	29.3	318	9
BEACHHATCH	96.0	95.0	12.5	131	5
LOVELLO	86.0	86.0	10.3	120	3
RELIANCE1	21.5	18.7	7.1	372	8
QUASEMIND	26.5	26.5	5.3	200	1
FINEFOODS	190.5	190.0	3.8	20	2
CENTRALINS	49.0	49.0	2.5	50	2
GP	298.5	298.5	2.0	7	1
RUPALILIFE	107.0	95.0	2.0	20	2
FUWANGFOOD	11.0	11.0	1.7	150	1
CNATEX	4.6	4.6	1.6	338	1
MIRACLEIND	15.0	15.0	1.4	96	1
KAY&QUE	250.6	210.4	1.4	6	2
ORIONINFU	290.0	290.0	1.4	5	1
MARICO	2,208.1	2,208.1	1.1	1	1
BDTHAI	9.0	9.0	0.9	100	1
BDTHAI	9.0	9.0	0.9	100	1
TOSRIFA	19.5	19.5	0.9	45	1
IFIC	7.1	7.1	0.9	121	1
MTB	11.9	11.9	0.8	66	1
BDTHAIFOOD	15.0	15.0	0.8	51	1
<b>Total</b>			<b>166.1</b>		<b>81</b>

**Important DSE News**
**SAMATALETH**

The Board of Directors has recommended 0.40% Cash Dividend (Tk. 0.04 for each ordinary share) for General Shareholders excluding Sponsors and Directors for the year ended June 30, 2024. The Sponsors and Directors and Placement Holders are holding 51,60,000 shares out of the total 1,03,20,000 shares of the company and Cash Dividend payable to the General Shareholders is Tk. 206,400.00. Date of AGM: 31.12.2024, Time: 11:00 AM, Venue: Hybrid System and at factory premises, 120, Sher-E-Bangla Road, Hazaribagh, Dhaka-1209. Record Date: 15.12.2024. The Company has also reported EPS of Tk. 0.05, NAV per share of Tk. 14.37 and NOCFPS of Tk. (0.05) for the year ended June 30, 2024 as against Tk. 0.04, Tk. 14.34 and Tk. (0.07) respectively for the year ended June 30, 2023.

**BDTHAI**

The Board of Directors has recommended 0.25% Cash dividend (other than Sponsors & Promoters) for the year ended June 30, 2024. The quantities of securities held by the said sponsors and promoters who will not be entitled to recommended dividend: 1,96,16,401 shares. The amount payable to the general shareholders is Tk. 27,03,971.23. Date of AGM: 31.12.2024, Time: 11:30 AM, Venue: Hybrid System; Trust Milonayaton, 545 Old Airport Road, Dhaka Cantonment, Dhaka-1206, Bangladesh. Record Date: 15.12.2024. The Company has also reported EPS of Tk. (0.85), NAV per share of Tk. 30.56 and NOCFPS of Tk. (0.96) for the year ended June 30, 2024 as against Tk. (0.52), Tk. 27.84 and Tk. 0.59 respectively for the year ended June 30, 2023. The board also accepted the report on revaluation.

**ICB**

**(Q1 Un-audited):** Consolidated EPS was Tk. (0.87) for July-September 2024 as against Tk. (2.73) for July-September 2023; Consolidated NOCFPS was Tk. (1.80) for July-September 2024 as against Tk. (0.72) for July-September 2023. Consolidated NAV per share was Tk. 51.08 as on September 30, 2024 and Tk. 51.95 as on June 30, 2024. EPS increased due to increase in capital gain from sale of securities and increase in dividend income.

**MJLBD**

The company has informed that in order to replace its aging tanker vessel MT Omera Legacy; the Board of Directors of MJL Bangladesh PLC. has approved the purchase of second hand Aframax Oil Tanker with a capacity of about 115,000 DWT, age around 12 to 13 years and price range of USD 45 million to USD 47 million.

**LOVELLO**

The company has informed that the Board of Directors of the company has approved a proposal to purchase shares equal to 50% of the paid-up capital of Sharika Foods & Amandala Limited. The company wants to purchase 5 lakh shares @Tk. 10 each which is equal to 50% of the current paid-up capital of Sharika Foods & Amandala Limited. The acquisition cost of purchasing 5 lakh shares is Tk. 50,00,000.00 which will be funded from the earnings of the company. The company will implement the decision to purchase the said amount of shares of Sharika Foods & Amandala Limited after obtaining the consent of the shareholders of the upcoming 13th Annual General Meeting (AGM).

**ATLASBANG**

The company has informed that a Memorandum of Understanding has been signed between Atlas Bangladesh Limited (ABL) and Runner Trade Park Limited (RTPL). For the purpose of MoU Atlas Bangladesh Limited (ABL) and Runner Trade Park Limited (RTPL) will establish helmet manufacturing plant under the name of "Atlas-Runner Helmet Plant".

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
KOHINOOR		10.0%	50%	Record Date	28-Nov-24
SILVAPHL		0.0%	1%	Record Date	1-Dec-24
BARKAPOWER		0.0%	4%	Record Date	1-Dec-24
BPPL		0.0%	2%	Record Date	1-Dec-24

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