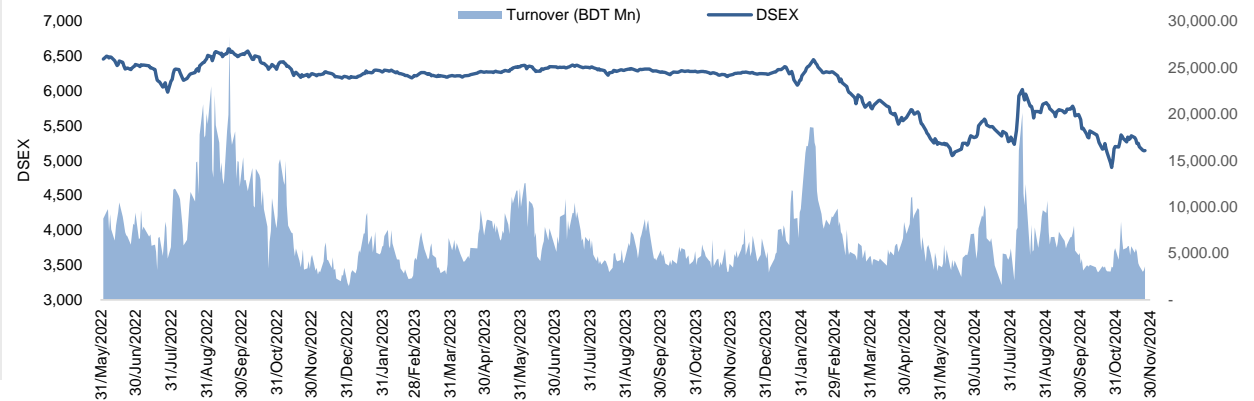


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 7 points and closed at 5,143.13. The blue-chip index DS30 (-0.13%), the Shariah-based index DSES (+0.09%), and the large-cap index CDSET (+0.15%) closed at 1,894.30, 1,148.51, and 1,047.71 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.70%, followed by Bank (+0.19%), Engineering (+0.06%), Pharmaceutical (-0.53%), Fuel & Power (-0.55%), Food & Allied (-1.07%), and NBF1 (-1.50%), respectively. Block trades contributed 6.7% of the overall market turnover. NRB Bank Limited (+7.0%) was the most traded share with a turnover of BDT 202 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,143.13	5,136.13	+7.00	+0.14%	-17.7%
DS30	1,894.30	1,896.74	-2.44	-0.13%	-9.5%
DSES	1,148.51	1,147.49	+1.03	+0.09%	-15.8%
CDSET	1,047.71	1,046.15	+1.56	+0.15%	-12.9%

	Advanced	Declined	Unchanged	Total
All Category	119	200	79	398
A Category (Equity)	64	126	42	232
B Category (Equity)	30	31	19	80
N Category (Equity)	0	3	1	4
Z Category (Equity)	25	40	17	82
Mutual Funds	10	8	19	37
Corporate Bonds	1	0	1	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,606,417	6,600,859	+0.1%
Mn USD	55,053	55,007	
Turnover			
Mn BDT	3,598	3,198	+12.5%
Mn USD	30	27	
Volume			
Mn Shares	124	112	+10.5%
No. of Trade	117,452	118,824	-1.2%

* Based on Traded Scrips

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Figure: Sectorial Turnover (BDT Mn)

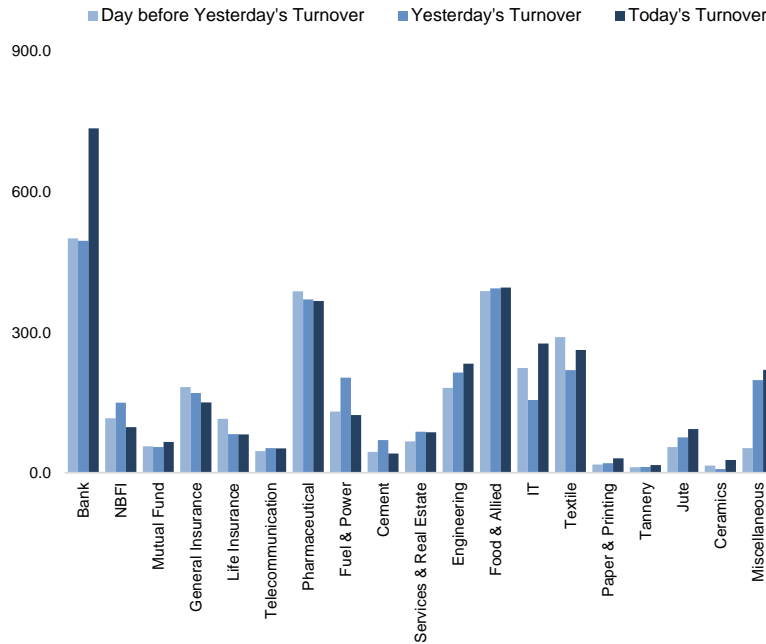
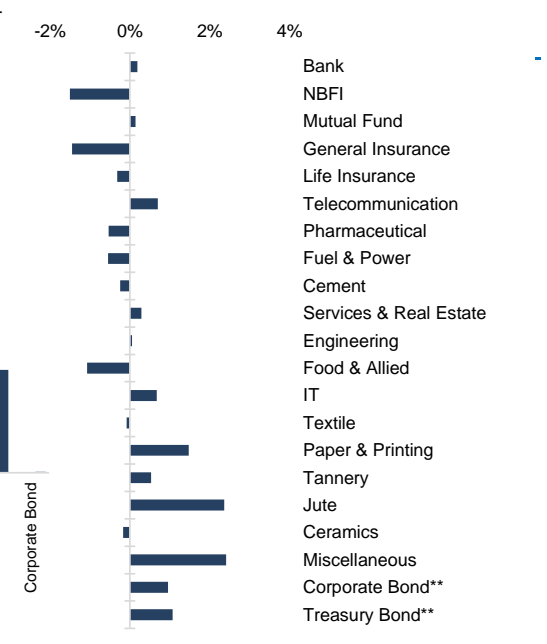


Figure: Sectorial Mcap Change



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	1,439	1,436	+2.73	+0.19%	36	680,770	10.3%	735.6	21.9%	8.7x	0.7x	GP	430,476	12.0%	34.1	12.2x	7.5x
NBFI	1,279	1,298	-19.51	-1.50%	23	121,833	1.8%	97.2	2.9%	NM	NM	BATBC	190,134	5.3%	25.0	10.8x	3.1x
Mutual Fund	596	595	+0.84	+0.14%	37	27,386	0.4%	65.7	2.0%	NM	0.5x	SQURPHARMA	184,382	5.2%	32.5	8.8x	1.4x
General Insurance	2,804	2,845	-41.24	-1.45%	43	80,052	1.2%	150.5	4.5%	14.5x	1.2x	WALTONHIL	146,284	4.1%	1.9	11.2x	1.3x
Life Insurance	1,911	1,917	-6.07	-0.32%	15	50,818	0.8%	81.7	2.4%	NM	NM	ROBI	132,520	3.7%	13.9	24.1x	2.0x
Telecommunication	4,982	4,947	+34.60	+0.70%	3	584,149	8.8%	51.8	1.5%	13.8x	4.1x	BEXIMCO	109,034	3.1%	0.0	NM	1.4x
Pharmaceutical	2,854	2,869	-15.21	-0.53%	34	541,076	8.2%	366.8	10.9%	13.8x	1.5x	ISLAMIBANK	85,813	2.4%	65.1	18.4x	1.2x
Fuel & Power	1,142	1,149	-6.27	-0.55%	23	302,383	4.6%	123.0	3.7%	15.0x	0.6x	BRACBANK	84,061	2.4%	35.5	7.6x	1.1x
Cement	1,995	2,000	-4.81	-0.24%	7	95,068	1.4%	41.0	1.2%	16.0x	2.0x	BERGERPBL	81,852	2.3%	0.3	24.6x	5.2x
Services & Real Estate	1,028	1,025	+3.00	+0.29%	9	56,564	0.9%	86.3	2.6%	18.8x	0.4x	UPGDCL	75,650	2.1%	2.4	7.2x	2.0x
Engineering	2,479	2,477	+1.39	+0.06%	42	279,620	4.2%	233.0	6.9%	12.3x	0.8x	RENATA	70,722	2.0%	5.0	22.2x	2.0x
Food & Allied	16,761	16,942	-181.30	-1.07%	21	306,676	4.6%	395.2	11.8%	16.4x	4.3x	LHB	62,250	1.7%	13.3	15.4x	3.1x
IT	2,037	2,023	+13.58	+0.67%	11	26,865	0.4%	275.7	8.2%	19.8x	1.7x	ICB	59,494	1.7%	35.5	30.6x	1.3x
Textile	1,057	1,058	-0.87	-0.08%	58	109,747	1.7%	262.0	7.8%	87.0x	0.7x	UNILEVERCL	50,865	1.4%	0.4	69.2x	21.6x
Paper & Printing	4,066	4,007	+59.09	+1.47%	6	18,370	0.3%	30.7	0.9%	NM	0.8x	DUTCHBANGL	41,305	1.2%	3.1	6.6x	0.8x
Tannery	1,957	1,947	+10.39	+0.53%	6	21,807	0.3%	16.4	0.5%	66.7x	1.5x	POWERGRID	38,380	1.1%	4.7	NM	0.2x
Jute	16,433	16,054	+379.13	+2.36%	3	3,617	0.1%	93.1	2.8%	NM	NM	BXPHARMA	35,734	1.0%	76.6	6.0x	0.7x
Ceramics	350	350	-0.59	-0.17%	5	15,683	0.2%	27.0	0.8%	NM	1.0x	PUBALIBANK	31,929	0.9%	3.7	3.3x	0.6x
Miscellaneous	4,298	4,197	+101.23	+2.41%	15	233,409	3.5%	219.9	6.6%	42.2x	1.8x	EBL	31,237	0.9%	101.4	4.8x	0.7x
Corporate Bond**	11,831	11,718	+112.15	+0.96%	16	34,803	0.5%	1.7	0.1%	NM	NM	OLYMPIC	30,571	0.9%	21.1	16.6x	2.7x
Treasury Bond**	480	475	+5.08	+1.07%	237	3,014,833	45.6%	0.8	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
STYLECRAFT	48.9	+9.9%	4.7	NM	8.5x
ISNLTD	36.2	+9.0%	10.3	NM	12.4x
SAFKOSPINN	8.6	+8.9%	0.2	NM	NM
ZAHINTEX	5.1	+8.5%	0.7	NM	0.7x
MIDLANDBNK	34.6	+7.8%	171.1	20.0x	2.4x
LEGACYFOOT	50.1	+7.51%	8.4	NM	4.5x
NRBBANK	13.7	+7.0%	202.0	22.6x	1x
JUTESPINN	282.7	+6.4%	3.4	NM	NM
ZAHEENSPIN	6.8	+6.3%	0.9	NM	1.7x
KAY&QUE	244.1	+6.0%	17.5	NM	2.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NFML	7.9	-9.2%	1.4	NM	0.7x
CLICL	37.8	-5.0%	4.8	NM	NM
PHOENIXFIN	4.0	-4.8%	1.0	NM	NM
AOL	12.3	-4.7%	1.6	7.9x	0.6x
PRIMEINSUR	35.3	-4.6%	2.8	15.8x	1.6x
JANATAINS	28.2	-4.4%	5.5	20.1x	1.9x
PRIMELIFE	32.7	-4.4%	0.3	NM	NM
NTC	205.0	-4.3%	1.8	NM	NM
NITOLINS	27.6	-4.2%	6.7	22.8x	0.9x
ASIANS	30.2	-4.1%	4.1	31.1x	1.1x

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	1.4x
BATBC	45,948	3.4%	10.8x	3.1x
RENATA	35,002	2.6%	22.2x	2.0x
ISLAMIBANK	33,649	2.5%	18.4x	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%	12.2x	7.5x
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	2.7x
CITYBANK	16,830	1.2%	4.0x	0.7x
BSRMLTD	14,210	1.0%	4.9x	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%	16.6x	2.7x
UTTARABANK	11,350	0.8%	7.6x	0.7x
ORIONPHARM	11,317	0.8%	44.9x	0.4x
ROBI	10,738	0.8%	24.1x	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	13.7	+7.0%	202.0	22.6x	1.1x
MIDLANDBNK	34.6	+7.8%	171.1	20.0x	2.4x
AGNISYSL	26.2	+1.9%	123.7	22.0x	1.5x
BSC	93.8	+1.7%	122.1	4.9x	0.9x
LOVELLO	88.1	-0.8%	108.7	48.0x	6.8x
EBL	23.0	-0.4%	101.4	4.8x	0.7x
SONALIANS	265.1	+1.7%	88.5	82.1x	4.3x
AIL	91.4	+2.4%	87.2	35.2x	3.6x
FINEFOODS	207.7	+3.3%	82.0	NM	17.4x
BXPHARMA	80.1	-1.0%	76.6	6.0x	0.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EBL	23.2	22.7	29.0	3,566	81.67
LEGACYFOOT	46.0	46.0	1.0	600	27.60
FINEFOODS	201.4	191.1	4.0	117	23.42
BEACHHATCH	99.7	95.0	3.0	190	18.26
MIDLANDBNK	33.7	32.5	5.0	430	14.33
MONNOAGML	421.5	421.5	2.0	32	13.49
LOVELLO	89.8	86.0	5.0	120	10.40
CNATEX	4.5	4.5	1.0	2,120	9.54
CITYGENINS	45.1	45.1	1.0	122	5.50
ORIONINFU	326.0	297.8	2.0	18	5.49

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EBL	23.2	22.7	81.7	3,566	29
LEGACYFOOT	46.0	46.0	27.6	600	1
FINEFOODS	201.4	191.1	23.4	117	4
BEACHHATCH	99.7	95.0	18.3	190	3
MIDLANDBNK	33.7	32.5	14.3	430	5
MONNOAGML	421.5	421.5	13.5	32	2
LOVELLO	89.8	86.0	10.4	120	5
CNATEX	4.5	4.5	9.5	2,120	1
CITYGENINS	45.1	45.1	5.5	122	1
ORIONINFU	326.0	297.8	5.5	18	2
AIL	89.0	89.0	4.5	50	1
EIL	56.5	56.5	4.2	74	1
BSC	91.5	91.5	3.1	34	1
SONALIPAPR	130.0	130.0	2.9	22	1
SUNLIFEINS	67.0	56.0	2.3	38	3
SQURPHARMA	202.0	202.0	2.0	10	1
CENTRALINS	46.0	46.0	1.5	33	3
CENTRALINS	46.0	46.0	1.5	33	3
DAFODILCOM	70.5	70.5	1.5	21	2
UNIONCAP	6.0	6.0	1.4	230	1
MJLBD	95.0	95.0	1.3	14	1
QUEENSOUTH	12.8	12.8	1.3	100	1
Total			242.6		77

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MONNOCERA		0.0%	1%	Record Date	1-Dec-24

Important DSE News
AGNISYSL

The Board of Directors has recommended 4.80% (i.e., Tk. 0.48 per share) Cash Dividend for all shareholders for the year ended June 30, 2024. Date of AGM: 31.12.2024, Time: 09:00 AM, Venue: Hybrid System and at Club Shaheen Limited (CSL), House-55, Road-13, Block-D, Banani, Dhaka 1213, Bangladesh. Record Date: 17.12.2024. The Company has also reported EPS of Tk. 1.15, NAV per share of Tk. 16.62 and NOCFPS of Tk. 1.31 for the year ended June 30, 2024 as against Tk. 1.13, Tk. 15.95 and Tk. 1.38 respectively for the year ended June 30, 2023.

(Q1 Un-audited): EPS was Tk. 0.32 for July-September 2024 as against Tk. 0.28 for July-September 2023; NOCFPS was Tk. 0.58 for July-September 2024 as against Tk. 0.31 for July-September 2023. NAV per share was Tk. 16.95 as on September 30, 2024 and Tk. 16.62 as on June 30, 2024.

NFML

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. The AGM Date, Time, Venue and Record Date will be notified later. The Company has also reported EPS of Tk. (0.71), NAV per share of Tk. 11.07 and NOCFPS of Tk. 0.12 for the year ended June 30, 2024 as against Tk. 0.02, Tk. 11.78 and Tk. 0.29 respectively for the year ended June 30, 2023.

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., November 26, 2024 as the company has failed to declare any dividend for a period of 2 (two) consecutive years according to provision 1(a) of BSEC Directive No. BSEC/CMRRCD/2009-193/77 dated May 20, 2024.

BEACHHATCH

The Board of Directors has recommended 10% Cash Dividend (excluding Sponsors and Directors) for the year ended June 30, 2024. Date of AGM: 31.12.2024, Time: 11:30 AM, Venue: Hybrid System and at EON Convention Center, (9th floor), 304, Tejgaon I/A, Dhaka-1208. Record Date: 15.12.2024. The Company has also reported EPS of Tk. 2.03, NAV per share of Tk. 12.49 and NOCFPS of Tk. 0.93 for the year ended June 30, 2024 as against Tk. 0.93, Tk. 10.58 and Tk. 0.6564 respectively for the year ended June 30, 2023.

(Q1 Un-audited): EPS was Tk. 0.85 for July-September 2024 as against Tk. 0.44 for July-September 2023; NOCFPS was Tk. 0.31 for July-September 2024 as against Tk. 0.06 for July-September 2023. NAV per share was Tk. 13.33 as on September 30, 2024 and Tk. 11.02 as on September 30, 2023.

GOLDENSON

The Board of Directors has recommended 1.50% Cash dividend excluding Sponsors and/or Directors for the year ended June 30, 2024. The quantities of securities held by the said sponsors and/or directors who will not be entitled to recommended dividend: 52,014,510 shares. The amount payable to the general shareholders is Tk. 119,715,262.00. Date of AGM: 31.12.2024, Time: 11:30 AM, Venue: Factory premises through Hybrid System. Record Date: 15.12.2024. The Company has also reported consolidated EPS of Tk. (0.68), consolidated NAV per share of Tk. 17.99 and consolidated NOCFPS of Tk. (0.32) for the year ended June 30, 2024 as against Tk. (0.75), Tk. 18.99 and Tk. 1.00 respectively for the year ended June 30, 2023.

MONNOAGML

Monno Welfare Foundation, a Corporate Director of the Company, has expressed its intention to sell 72,000 shares out of its holding of 364,927 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

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