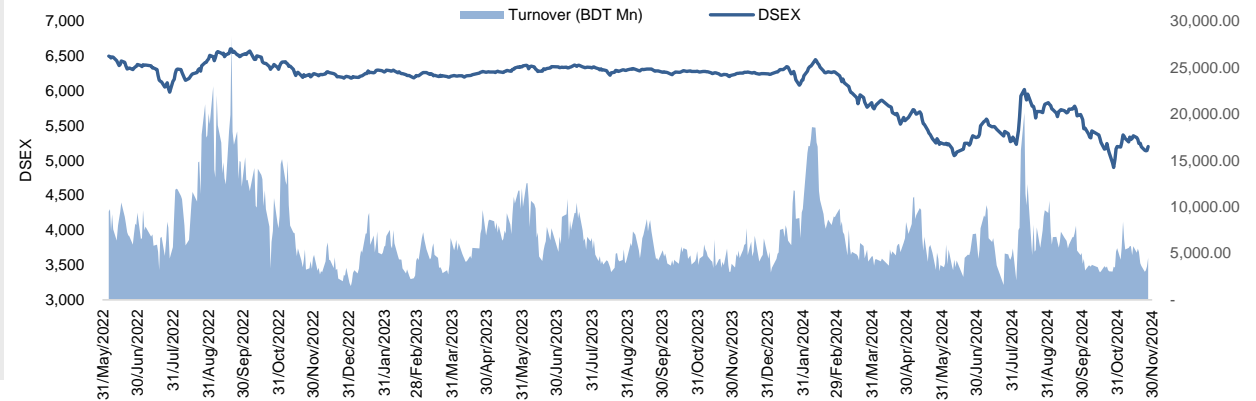


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.07%) gained 54.81 points and closed at 5,197.94. The blue-chip index DS30 (+1.22%), the Shariah-based index DSES (+1.57%), and the large-cap index CDSET (+0.67%) closed at 1,917.43, 1,166.57, and 1,054.71 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 3.75% followed by Telecommunication (+1.53%), Pharmaceutical (+1.53%), Fuel & Power (+1.30%), Engineering (+1.23%), Bank (+1.10%), and Food & Allied (+0.56%), respectively. Block trades contributed 2.3% of the overall market turnover. NRB Bank Limited (-0.7%) was the most traded share with a turnover of BDT 134 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,197.94	5,143.13	+54.81	+1.07%	-16.8%
DS30	1,917.43	1,894.30	+23.13	+1.22%	-8.4%
DSES	1,166.57	1,148.51	+18.06	+1.57%	-14.5%
CDSET	1,054.71	1,047.71	+7.00	+0.67%	-12.3%

	Advanced	Declined	Unchanged	Total
All Category	329	37	29	395
A Category (Equity)	199	17	15	231
B Category (Equity)	71	6	3	80
N Category (Equity)	4	0	0	4
Z Category (Equity)	55	14	11	80
Mutual Funds	29	0	8	37
Corporate Bonds	1	0	3	4
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ
Mcap	Mn BDT 6,650,516	6,606,417	+0.7%
	Mn USD 55,421	55,053	
Turnover	Mn BDT 4,512	3,598	+25.4%
	Mn USD 38	30	
Volume	Mn Shares 166	124	+34.3%
No. of Trade	147,740	117,452	+25.8%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 27, 2024

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Figure: Sectorial Turnover (BDT Mn)

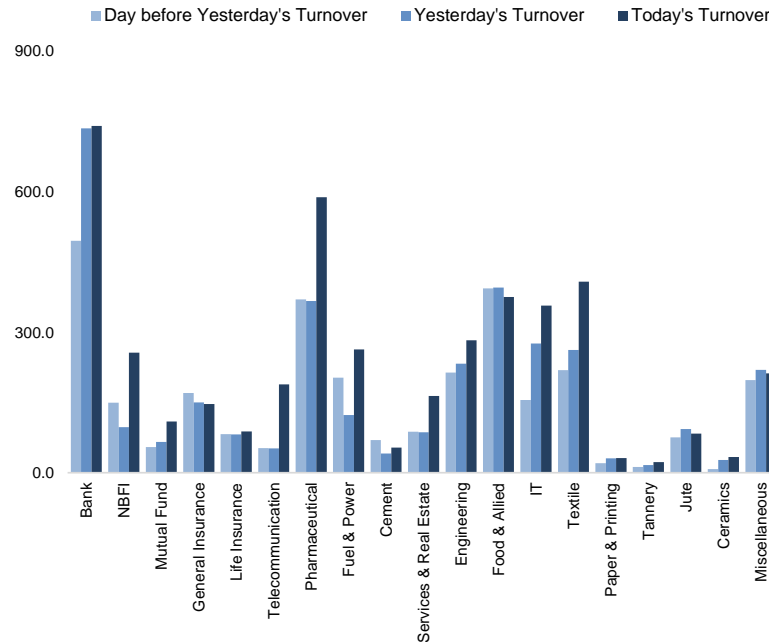
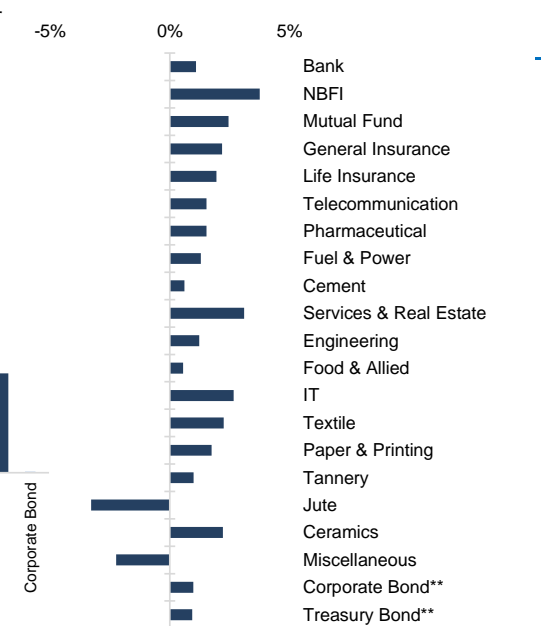


Figure: Sectorial Mcap Change



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	1,455	1,439	+15.81	+1.10%	36	688,250	10.4%	740.8	16.8%	8.8x	0.7x	GP	433,581	12.0%	132.7	12.2x	7.5x
NBFI	1,327	1,279	+48.00	+3.75%	23	126,407	1.9%	256.5	5.8%	NM	NM	BATBC	191,430	5.3%	42.1	10.9x	3.1x
Mutual Fund	610	596	+14.63	+2.46%	37	28,058	0.4%	109.5	2.5%	NM	0.5x	SQURPHARMA	184,825	5.1%	48.6	8.8x	1.4x
General Insurance	2,866	2,804	+61.38	+2.19%	43	81,804	1.2%	146.7	3.3%	14.8x	1.2x	WALTONHIL	146,981	4.1%	3.7	11.3x	1.3x
Life Insurance	1,948	1,911	+37.31	+1.95%	15	51,811	0.8%	88.4	2.0%	NM	NM	ROBI	137,758	3.8%	51.1	25.0x	2.1x
Telecommunication	5,058	4,982	+76.42	+1.53%	3	593,110	8.9%	188.7	4.3%	14.0x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,898	2,854	+43.69	+1.53%	34	549,359	8.3%	588.3	13.3%	14.0x	1.5x	BRACBANK	86,008	2.4%	57.6	7.8x	1.1x
Fuel & Power	1,157	1,142	+14.85	+1.30%	23	306,313	4.6%	263.1	6.0%	15.2x	0.6x	ISLAMIBANK	85,652	2.4%	85.1	18.3x	1.2x
Cement	2,007	1,995	+12.10	+0.61%	7	95,645	1.4%	53.5	1.2%	16.1x	2.0x	BERGERPBL	81,523	2.3%	0.8	24.5x	5.1x
Services & Real Estate	1,060	1,028	+31.98	+3.11%	9	58,323	0.9%	164.0	3.7%	19.4x	0.4x	UPGDCL	77,273	2.1%	9.2	7.4x	2.0x
Engineering	2,509	2,479	+30.57	+1.23%	42	283,070	4.3%	283.0	6.4%	12.4x	0.9x	MARICO	72,938	2.0%	56.4	13.8x	9.6x
Food & Allied	16,854	16,761	+93.38	+0.56%	21	308,385	4.6%	375.5	8.5%	16.5x	4.4x	ICB	62,443	1.7%	108.6	32.1x	1.4x
IT	2,091	2,037	+54.31	+2.67%	11	27,582	0.4%	356.9	8.1%	20.3x	1.8x	LHB	62,366	1.7%	9.4	15.4x	3.1x
Textile	1,081	1,057	+23.81	+2.25%	58	112,218	1.7%	408.3	9.3%	88.9x	0.7x	UNILEVERCL	49,909	1.4%	1.4	67.9x	21.2x
Paper & Printing	4,137	4,066	+70.88	+1.74%	6	18,690	0.3%	31.4	0.7%	NM	0.8x	DUTCHBANGL	41,832	1.2%	1.4	6.7x	0.9x
Tannery	1,977	1,957	+19.50	+1.00%	6	22,024	0.3%	22.7	0.5%	67.4x	1.5x	POWERGRID	37,832	1.0%	11.4	NM	0.2x
Jute	15,893	16,433	-540.32	-3.29%	3	3,498	0.1%	83.3	1.9%	NM	NM	BXPHARMA	37,518	1.0%	48.5	6.2x	0.8x
Ceramics	357	350	+7.75	+2.22%	5	16,030	0.2%	33.4	0.8%	NM	1.0x	PUBALIBANK	32,276	0.9%	5.7	3.4x	0.6x
Miscellaneous	4,202	4,298	-96.06	-2.23%	15	228,193	3.4%	212.3	4.8%	41.2x	1.8x	EBL	31,780	0.9%	25.0	4.9x	0.7x
Corporate Bond**	11,946	11,831	+115.76	+0.98%	16	34,824	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,290	0.9%	11.5	17.0x	2.8x
Treasury Bond**	484	480	+4.48	+0.93%	237	3,016,044	45.4%	0.7	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GHCL	20.9	+10.0%	7.8	NM	0.3x
SONARGAON	24.2	+10.0%	20.3	65.4x	1.3x
HRTEX	26.5	+10.0%	5.0	NM	0.8x
MONNOFABR	15.6	+9.9%	21.6	NM	0.6x
INTRACO	19.2	+9.7%	66.4	23.1x	1.5x
DOMINAGE	11.7	+9.35%	14.2	NM	0.7x
GLDNJMF	8.6	+8.9%	15.3	NM	1x
SAFKOSPINN	9.3	+8.1%	0.8	NM	NM
AFCAGRO	9.3	+8.1%	0.5	NM	0.5x
SAIFPOWER	12.2	+8.0%	19.1	17.4x	0.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NEWLINE	10.1	-9.8%	18.0	19.4x	0.4x
MITHUNKNIT	14.5	-5.2%	0.8	NM	5x
BEXIMCO	110.1	-4.8%	0.0	NM	1.3x
PLFSL	2.7	-3.6%	0.2	NM	NM
SONALIANS	256.0	-3.4%	81.2	79.3x	4.1x
JUTESPINN	273.2	-3.4%	2.1	NM	NM
EXIMBANK	6.5	-3.0%	8.0	NM	0.3x
ZAHEENSPIN	6.6	-2.9%	0.8	NM	1.7x
PHOENIXFIN	3.9	-2.5%	1.0	NM	NM
BEACHHATCH	93.9	-2.4%	52.1	38.5x	7.0x

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%	10.9x	3.1x
RENATA	35,002	2.6%	22.9x	2.1x
ISLAMIBANK	33,649	2.5%	18.3x	1.2x
BXPHARMA	32,479	2.4%	6.2x	0.8x
BRACBANK	32,157	2.4%	7.8x	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%	4.9x	0.7x
PUBALIBANK	20,448	1.5%	3.4x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.9x	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%	17.0x	2.8x
UTTARABANK	11,350	0.8%	7.7x	0.7x
ORIONPHARM	11,317	0.8%	47.1x	0.4x
ROBI	10,738	0.8%	25.0x	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
NRBBANK	13.6	-0.7%	134.2	22.4x	1.1x
GP	321.1	+0.7%	132.7	12.2x	7.5x
AGNISYSL	27.2	+3.8%	131.8	22.9x	1.6x
BSC	93.5	-0.3%	126.5	4.9x	0.9x
MIDLANDBNK	34.0	-1.7%	115.6	19.7x	2.4x
GENEXIL	31.0	+4.4%	114.3	12.4x	1.5x
ICB	72.0	+5.0%	108.6	32.1x	1.4x
LOVELLO	89.9	+2.0%	93.4	49.0x	6.9x
FEKDIL	19.2	+3.8%	86.2	8.8x	0.9x
ISLAMIBANK	53.2	-0.2%	85.1	18.3x	1.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
LEGACYFOOT	48.0	47.0	2.0	625	29.75
MONNOAGML	421.5	421.5	1.0	40	16.86
FINEFOODS	205.3	201.0	4.0	48	9.69
KBPPWBIL	140.5	137.0	4.0	57	7.87
AIL	93.0	93.0	2.0	80	7.48
NATLIFEINS	128.5	128.5	1.0	45	5.78
ROBI	27.8	23.0	2.0	199	4.98
ISLAMIBANK	54.0	54.0	1.0	86	4.64
NRBBANK	13.5	13.5	1.0	300	4.05
CENTRALINS	47.0	47.0	2.0	50	2.35

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
LEGACYFOOT	48.0	47.0	29.8	625	2
MONNOAGML	421.5	421.5	16.9	40	1
FINEFOODS	205.3	201.0	9.7	48	4
KBPPWBIL	140.5	137.0	7.9	57	4
AIL	93.0	93.0	7.5	80	2
NATLIFEINS	128.5	128.5	5.8	45	1
ROBI	27.8	23.0	5.0	199	2
ISLAMIBANK	54.0	54.0	4.6	86	1
NRBBANK	13.5	13.5	4.1	300	1
CENTRALINS	47.0	47.0	2.4	50	2
ADNTEL	90.0	90.0	2.3	25	1
AL-HAJTEX	108.0	107.0	2.0	19	2
IPDC	17.7	17.7	1.8	102	1
ACI	136.0	136.0	0.9	6	1
SONALIANS	280.0	280.0	0.7	3	1
BEACHHATCH	93.1	93.1	0.7	7	1
ASIATICLAB	32.3	32.3	0.6	18	1
ASIATICLAB	32.3	32.3	0.6	18	1
NTC	222.0	222.0	0.5	2	1
ICB	73.7	73.7	0.5	7	1
PRIMEBANK	24.1	24.1	0.5	21	1
Total			104.4		32

Important DSE News
MONOSPOOL

Mr. Mustafa Kamal Mohiuddin, a Sponsor Director of the company, has expressed his intention to transfer 1,020,000 shares of the company to his spouse Ms. Dilara Mostafa (a General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from November 26, 2024.

Mr. Mustafa Kamal Mohiuddin, a Sponsor Director of the company, has expressed his intention to transfer 1,020,000 shares of the company to his son Mr. Mostafa Azad Mohiuddin (a General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from November 26, 2024.

ISLAMICFIN

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Islamic Finance & Investment PLC.' instead of 'Islamic Finance & Investment Limited' with effect from November 28, 2024. Other things (except name) will remain unchanged.

WALTONHIL

Mr. S. M. Rezaul Alam, a Sponsor Director of the company, has expressed his intention to transfer 6,060,000 shares of the company to his daughter Ms. Roshmi Ruhi and 6,060,000 shares of the company to his spouse Ms. Fahima Husna (both are General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from November 25, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MONNOAGML		25.0%	0%	Record Date	1-Dec-24
MONOSPOOL		0.0%	12%	Record Date	1-Dec-24
FINEFOODS		0.0%	10%	Record Date	1-Dec-24
ATLASBANG		0.0%	0%	Record Date	1-Dec-24
PAPERPROC		0.0%	14%	Record Date	1-Dec-24

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