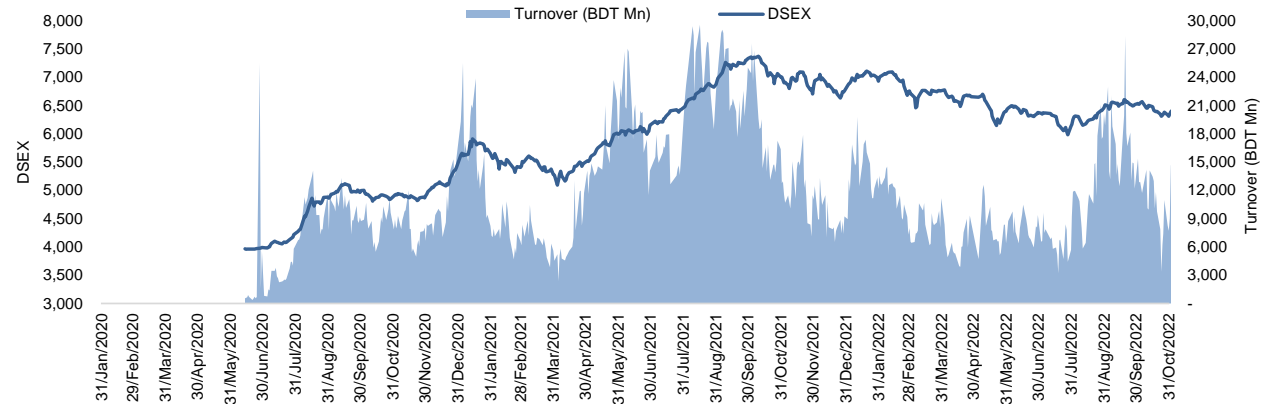


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.55%) lost 34.35 points and closed at 6,197.94. The blue-chip index DS30 (-0.49%), the Shariah-based index DSES (-0.69%), and the large-cap index CDSET (-0.35%) closed at 2,191.59, 1,354.59, and 1,212.64 points, respectively. All the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.81% followed by Food & Allied (-0.12%), Bank (-0.04%), Fuel & Power (-0.04%), Engineering (-0.03%), NBF (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 2.7% of the overall market turnover. Genex Infosys Limited (-9.8%) was the most traded share with a turnover of BDT 438 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,197.94	6,232.29	-34.35	-0.55%	-8.3%
DS30	2,191.59	2,202.39	-10.80	-0.49%	-13.5%
DSES	1,354.59	1,363.99	-9.40	-0.69%	-5.3%
CDSET	1,212.64	1,216.94	-4.30	-0.35%	-10.8%

	Advanced	Declined	Unchanged	Total
All Category	12	74	209	295
A Category (Equity)	8	56	152	216
B Category (Equity)	3	13	45	61
N Category (Equity)	0	4	4	8
Z Category (Equity)	1	1	8	10
Mutual Funds	0	0	17	17
Corporate Bonds	1	0	0	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,629,699	7,643,765	-0.2%
	Mn USD	72,251	72,384	
Turnover	Mn BDT	4,168	3,397	+22.7%
	Mn USD	39	32	
Volume	Mn Shares	62	52	+20.3%
	No. of Trade	148,542	99,102	+49.9%

* Average Interbank Exchange Rate is BDT 105.60 as of Nov 27, 2022

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Figure: Sectorial Turnover (BDT)

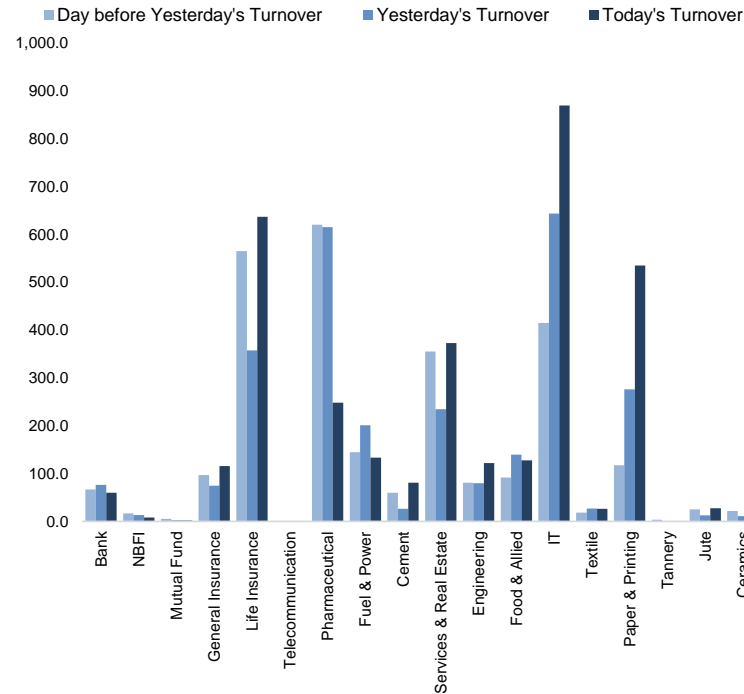
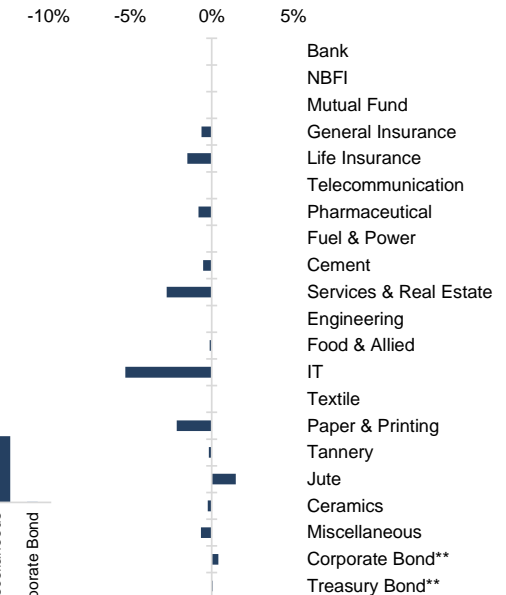


Figure: Sectorial Mcap Change



Market PE 16.8x

Market PB 1.5x

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	1,426	1,427	-0.57	-0.04%	34	666,328	8.8%	60.1	1.7%	7.7x	0.7x	GP	386,996	8.7%	0.5	11.2x	9.1x
NBFI	1,921	1,922	-0.24	-0.01%	23	187,433	2.5%	8.0	0.2%	NM	4.4x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	1.9	0.1%	NM	0.8x	BATBC	280,098	6.3%	0.6	16.8x	6.7x
General Insurance	3,177	3,197	-20.18	-0.63%	41	92,133	1.2%	115.6	3.3%	15.6x	1.5x	SQURPHARMA	188,459	4.2%	0.0	10.1x	1.7x
Life Insurance	2,498	2,535	-37.74	-1.49%	14	70,047	0.9%	636.6	18.1%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.7	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.3	28.1x	4.6x
Pharmaceutical	3,755	3,785	-30.71	-0.81%	33	719,361	9.4%	248.0	7.0%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.1	13.6x	3.8x
Fuel & Power	1,698	1,699	-0.64	-0.04%	23	447,708	5.9%	133.3	3.8%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.8	8.2x	1.2x
Cement	2,321	2,333	-12.33	-0.53%	7	111,462	1.5%	80.9	2.3%	33.0x	2.5x	BERGERPBL	79,380	1.8%	0.0	25.8x	6.9x
Services & Real Estate	1,729	1,778	-48.94	-2.75%	8	68,317	0.9%	372.6	10.6%	38.7x	0.9x	MARICO	76,277	1.7%	0.0	21.3x	44.9x
Engineering	4,490	4,491	-1.38	-0.03%	42	527,060	6.9%	121.9	3.5%	27.6x	1.8x	ICB	74,135	1.7%	0.0	68.1x	1.6x
Food & Allied	21,165	21,192	-26.27	-0.12%	21	377,136	5.0%	127.8	3.6%	21.4x	7.4x	BXPBARMA	65,222	1.5%	15.5	12.8x	1.6x
IT	3,026	3,195	-169.17	-5.29%	11	39,448	0.5%	869.0	24.6%	28.1x	2.7x	BEACONPHAR	63,710	1.4%	18.4	78.4x	10.3x
Textile	1,630	1,631	-0.59	-0.04%	58	171,469	2.3%	26.4	0.7%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	11,042	11,284	-241.88	-2.14%	6	42,543	0.6%	534.9	15.2%	47.9x	2.1x	ISLAMIBANK	53,130	1.2%	11.5	10.8x	0.8x
Tannery	3,075	3,080	-5.34	-0.17%	6	33,106	0.4%	0.7	0.0%	40.2x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	11,449	11,283	+166.04	+1.47%	3	2,801	0.0%	27.6	0.8%	NM	98.8x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	688	689	-1.63	-0.24%	5	31,803	0.4%	21.2	0.6%	33.2x	1.9x	POWERGRID	37,347	0.8%	0.2	38.5x	0.4x
Miscellaneous	4,058	4,085	-27.22	-0.67%	15	227,618	3.0%	138.5	3.9%	12.4x	1.8x	SUMITPOWER	36,308	0.8%	0.1	10.0x	0.9x
Corporate Bond**	91	90	+0.36	+0.40%	9	37,420	0.5%	0.3	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	99	99	+0.05	+0.05%	250	3,142,803	41.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JUTESPINN	212.6	+7.5%	4.4	NM	NM	SQURPHARMA	123,309	7.3%	10.1x	1.7x	GENEXIL	90.4	-9.8%	438.4	26.1x	5.0x
MONNOAGML	599.8	+3.6%	45.9	NM	3.4x	BATBC	74,086	4.4%	16.8x	6.7x	BPML	78.3	-10.0%	360.9	21.0x	1.0x
PAPERPROC	197.7	+3.2%	56.5	42.0x	6.1x	BEXIMCO	70,355	4.2%	8.2x	1.2x	CLICL	68.7	-4.6%	332.4	NM	NM
KAY&QUE	266.0	+2.9%	3.5	NM	3.6x	RENATA	68,196	4.1%	28.1x	4.6x	AAMRANET	49.1	-5.2%	175.4	21.4x	1.4x
SONALIPAPR	685.1	+2.4%	66.0	73.3x	4.0x	BXPBARMA	45,538	2.7%	12.8x	1.6x	ORIONPHARM	83.4	-5.1%	152.1	20.6x	0.9x
SONALIANS	720.2	+0.8%	23.2	NM	3.2x	BEACONPHAR	44,597	2.7%	78.4x	10.3x	EHL	76.8	-8.8%	110.7	12.4x	1.0x
JAMUNAOIL	168.7	+0.4%	1.0	8.8x	1x	GP	38,700	2.3%	11.2x	9.1x	INTRACO	41.8	-4.6%	104.5	33.9x	3.3x
BENGALWTL	25.5	+0.4%	5.1	50.0x	1.0x	BRACBANK	30,976	1.8%	10.9x	1.0x	SAPORTL	30.7	-9.7%	101.0	21.5x	0.9x
PUBALIBANK	26.0	+0.4%	0.6	5.4x	0.6x	LHBL	26,581	1.6%	18.4x	4.1x	SEAPEARL	175.9	-1.5%	96.4	65.1x	13.5x
BGIC	55.4	+0.4%	9.8	34.6x	2.8x	ISLAMIBANK	23,866	1.4%	10.8x	0.8x	PADMALIFE	50.8	-6.8%	93.9	NM	NM
						NBL	19,116	1.1%	NM	0.6x						
						PUBALIBANK	18,314	1.1%	5.4x	0.6x						
						CITYBANK	17,615	1.0%	4.5x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
						ROBI	15,714	0.9%	NM	2.4x	RENATA	1,218.0	1,141.8	4.0	125	152.69
						ALARABANK	14,609	0.9%	14.6x	1.1x	BEXIMCO	115.6	104.1	10.0	1,316	148.50
						BSRMLTD	14,417	0.9%	8.7x	0.7x	IPDC	59.0	57.6	2.0	2,009	118.50
						OLYMPIC	14,336	0.9%	18.8x	2.4x	BPML	95.6	78.3	10.0	464	43.30
						UPGDCL	13,547	0.8%	13.6x	3.8x	ORIONINFU	658.7	599.0	2.0	53	34.46
						SUMITPOWER	13,358	0.8%	10.0x	0.9x	BRACBANK	38.5	34.7	7.0	509	17.79
						ORIONPHARM	13,275	0.8%	20.6x	0.9x	ACMEPL	31.9	31.9	5.0	450	14.36
											INTRACO	45.0	39.8	6.0	317	12.97
											ORIONPHARM	90.0	86.0	3.0	126	11.27
											FORTUNE	79.5	79.5	1.0	131	10.40

* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RENATA	1,218.0	1,141.8	152.7	125	4
BEXIMCO	115.6	104.1	148.5	1,316	10
IPDC	59.0	57.6	118.5	2,009	2
BPML	95.6	78.3	43.3	464	10
ORIONINFU	658.7	599.0	34.5	53	2
BRACBANK	38.5	34.7	17.8	509	7
ACMEPL	31.9	31.9	14.4	450	5
INTRACO	45.0	39.8	13.0	317	6
ORIONPHARM	90.0	86.0	11.3	126	3
FORTUNE	79.5	79.5	10.4	131	1
BEACHHATCH	45.8	42.0	9.6	227	2
BATBC	480.0	479.8	9.0	19	7
GP	274.9	274.9	4.4	16	1
AAMRATECH	45.2	45.2	4.3	95	1
BSCCL	200.0	199.8	4.0	20	5
IFIC	11.0	10.6	3.8	351	5
FIRSTSBANK	8.9	8.9	3.6	400	2
SAIFPOWER	29.7	29.0	3.5	120	2
AOL	39.4	39.4	2.8	70	1
MHSML	26.5	26.5	2.7	100	1
BDFINANCE	45.1	45.1	2.4	53	2
WATACHEM	189.0	183.0	2.3	13	2
Total			641.7		114

Important DSE News
AMBEEPHA

(Q1 Un-audited): EPS was Tk. 0.25 for July-September 2022 as against Tk. 0.10 for July-September 2021; NOCFPS was Tk. 4.34 for July-September 2022 as against Tk. 8.37 for July-September 2021. NAV per share was Tk. 22.20 as on September 30, 2022 and Tk. 21.96 as on June 30, 2022.

APEXFOOT

Syed Manzur Elahi, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 60,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 16.11.2022.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Mozaffar Hossain Spinning Mills Ltd.	-	0.0%	6.0%	Record Date	29-Nov-22
Hamid Fabrics Limited	-	0.0%	5.0%	Record Date	29-Nov-22
Tosrifa Industries Limited	-	0.0%	3.0%	Record Date	30-Nov-22
JMI Hospital Requisite Manufacturing Limited	-	0.0%	12.5%	Record Date	30-Nov-22
Associated Oxygen Limited	-	0.0%	10.0%	Record Date	30-Nov-22
Golden Son Ltd.	-	0.0%	10.0%	Record Date	30-Nov-22
Samorita Hospital Limited	-	5.0%	5.0%	Record Date	30-Nov-22
Premier Leasing & Finance Limited	-	0.0%	0.0%	Record Date	30-Nov-22
National Tubes Limited	-	0.0%	0.0%	Record Date	30-Nov-22
Dragon Sweater and Spinning Limited	-	0.0%	2.0%	Record Date	30-Nov-22
Bangladesh Services Ltd.	-	0.0%	0.0%	Record Date	30-Nov-22
Power Grid Company of Bangladesh Ltd.	-	0.0%	10.0%	Record Date	30-Nov-22
Khan Brothers PP Woven Bag Industries Limited	-	0.0%	2.0%	Record Date	30-Nov-22
Shahjibazar Power Co. Ltd.	-	4.0%	16.0%	Record Date	1-Dec-22
GBB Power Ltd.	-	0.0%	3.0%	Record Date	1-Dec-22
Silva Pharmaceuticals Limited	-	0.0%	3.0%	Record Date	1-Dec-22
Meghna Cement Mills Ltd.	-	5.0%	5.0%	Record Date	1-Dec-22

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