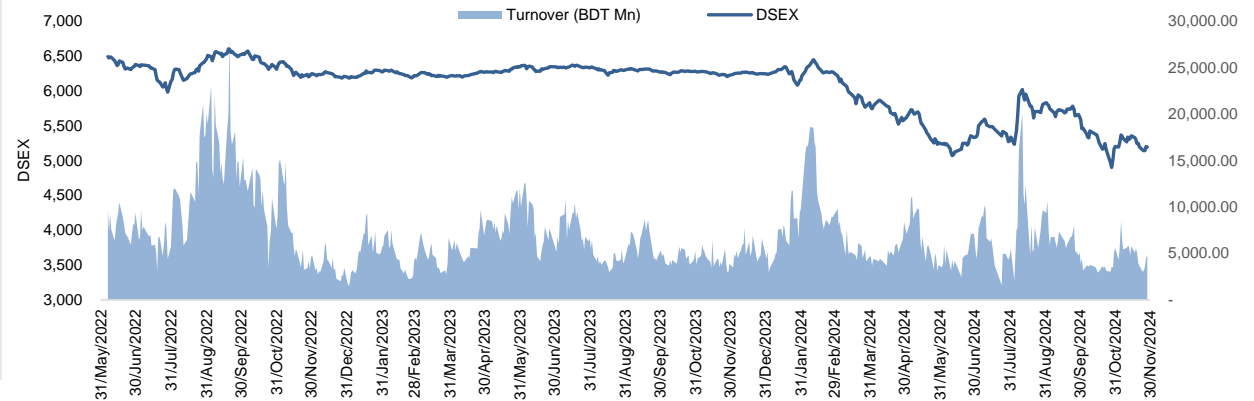


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.10%) lost 5.34 points and closed at 5,192.59. The blue-chip index DS30 (-0.06%), the Shariah-based index DSES (+0.03%), and the large-cap index CDSET (-0.01%) closed at 1,916.23, 1,166.89, and 1,054.59 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.86% followed by Telecommunication (-0.38%), Fuel & Power (-0.26%), Bank (-0.22%), Food & Allied (-0.03%), Engineering (+0.33%), and Pharmaceutical (+0.42%), respectively. Block trades contributed 4.4% of the overall market turnover. NRB Bank Limited (+5.1%) was the most traded share with a turnover of BDT 242 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,192.59	5,197.94	-5.34	-0.10%	-16.9%
DS30	1,916.23	1,917.43	-1.19	-0.06%	-8.5%
DSES	1,166.89	1,166.57	+0.32	+0.03%	-14.5%
CDSET	1,054.59	1,054.71	-0.12	-0.01%	-12.3%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	125	196	69	390
<b>A Category (Equity)</b>	62	129	35	226
<b>B Category (Equity)</b>	30	37	12	79
<b>N Category (Equity)</b>	1	2	1	4
<b>Z Category (Equity)</b>	32	28	21	81
<b>Mutual Funds</b>	5	13	19	37
<b>Corporate Bonds</b>	0	1	0	1
<b>Treasury Bonds</b>	0	0	0	0

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,643,564	6,650,516	-0.1%
Mn USD	55,363	55,421	
<b>Turnover</b>			
Mn BDT	4,738	4,512	+5.0%
Mn USD	39	38	
<b>Volume</b>			
Mn Shares	176	166	+6.3%
<b>No. of Trade</b>	158,999	147,740	+7.6%

\* Average Interbank Exchange Rate is BDT 120.00 as of Nov 28, 2024

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Figure: Sectorial Turnover (BDT Mn)

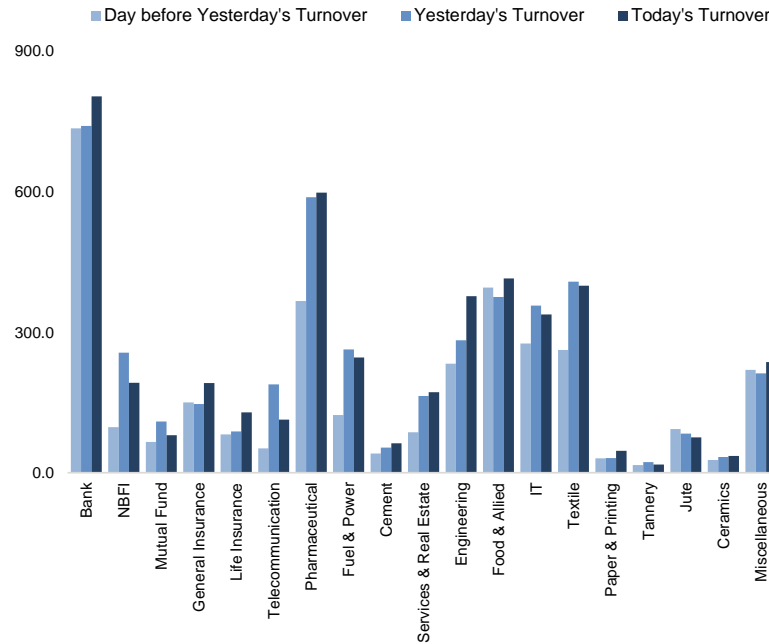
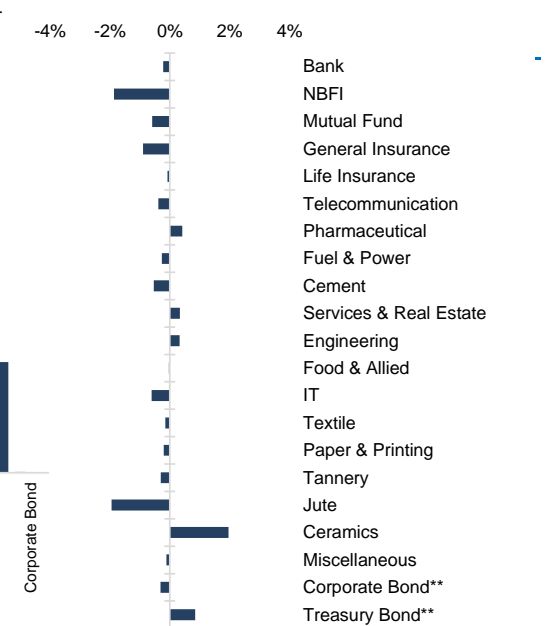


Figure: Sectorial Mcap Change



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	1,451	1,455	-3.22	-0.22%	36	686,727	10.3%	803.8	17.7%	8.9x	0.7x	GP	431,691	12.0%	59.8	12.2x	7.5x
NBFI	1,302	1,327	-24.70	-1.86%	23	124,053	1.9%	191.9	4.2%	NM	NM	BATBC	191,268	5.3%	25.0	10.9x	3.1x
Mutual Fund	607	610	-3.60	-0.59%	37	27,893	0.4%	80.2	1.8%	NM	0.5x	SQURPHARMA	184,825	5.1%	45.5	8.8x	1.4x
General Insurance	2,840	2,866	-25.51	-0.89%	43	81,076	1.2%	191.3	4.2%	14.7x	1.2x	WALTONHIL	147,859	4.1%	4.8	11.3x	1.3x
Life Insurance	1,946	1,948	-1.56	-0.08%	15	51,769	0.8%	128.8	2.8%	NM	NM	ROBI	136,710	3.8%	39.8	24.9x	2.1x
Telecommunication	5,039	5,058	-19.31	-0.38%	3	590,846	8.9%	113.1	2.5%	14.0x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,910	2,898	+12.15	+0.42%	34	551,663	8.3%	598.4	13.2%	14.0x	1.5x	BRACBANK	85,477	2.4%	59.6	7.7x	1.1x
Fuel & Power	1,154	1,157	-3.04	-0.26%	23	305,508	4.6%	245.8	5.4%	15.1x	0.6x	ISLAMIBANK	84,364	2.3%	71.4	18.1x	1.2x
Cement	1,996	2,007	-10.72	-0.53%	7	95,134	1.4%	62.9	1.4%	16.0x	2.0x	BERGERPBL	81,518	2.3%	0.4	24.5x	5.1x
Services & Real Estate	1,064	1,060	+3.57	+0.34%	9	58,519	0.9%	171.7	3.8%	19.5x	0.4x	UPGDCL	76,114	2.1%	3.8	7.3x	2.0x
Engineering	2,518	2,509	+8.28	+0.33%	42	284,004	4.3%	377.0	8.3%	12.4x	0.9x	RENATA	73,142	2.0%	2.4	22.9x	2.1x
Food & Allied	16,849	16,854	-5.09	-0.03%	21	308,291	4.6%	415.1	9.2%	16.5x	4.4x	LHB	62,250	1.7%	13.4	15.4x	3.1x
IT	2,078	2,091	-12.76	-0.61%	11	27,413	0.4%	337.8	7.5%	20.2x	1.7x	ICB	60,535	1.7%	58.3	31.1x	1.4x
Textile	1,079	1,081	-1.63	-0.15%	58	112,049	1.7%	399.2	8.8%	72.8x	0.7x	UNILEVERCL	50,113	1.4%	0.2	68.2x	21.3x
Paper & Printing	4,128	4,137	-8.55	-0.21%	6	18,651	0.3%	46.6	1.0%	NM	0.8x	DUTCHBANGL	42,008	1.2%	1.2	6.7x	0.9x
Tannery	1,971	1,977	-5.89	-0.30%	6	21,959	0.3%	17.2	0.4%	67.2x	1.5x	BXPHERMA	38,767	1.1%	85.5	6.5x	0.8x
Jute	15,584	15,893	-308.71	-1.94%	3	3,430	0.1%	75.7	1.7%	NM	NM	POWERGRID	37,649	1.0%	6.4	NM	0.2x
Ceramics	364	357	+7.02	+1.97%	5	16,345	0.2%	36.1	0.8%	NM	1.0x	PUBALIBANK	32,276	0.9%	8.5	3.4x	0.6x
Miscellaneous	4,197	4,202	-4.77	-0.11%	15	227,934	3.4%	236.4	5.2%	41.2x	1.8x	EBL	31,509	0.9%	46.1	4.8x	0.7x
Corporate Bond**	11,909	11,946	-37.41	-0.31%	16	34,400	0.5%	1.4	0.0%	NM	NM	OLYMPIC	30,791	0.9%	6.7	16.8x	2.7x
Treasury Bond**	488	484	+4.10	+0.85%	237	3,015,001	45.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HRTEX	29.1	+9.8%	7.9	NM	0.8x
MIRAKHTER	33.9	+9.7%	33.3	13.8x	0.7x
EMERALDOIL	31.4	+8.7%	82.7	24.2x	NM
METROSPIN	10.3	+8.4%	3.5	NM	1.6x
GHCL	22.5	+7.7%	16.5	NM	0.3x
NPOLYMER	34.4	+6.17%	26.9	16.9x	1.1x
NAHEEACP	22.1	+5.2%	25.3	63.1x	1x
NRBBANK	14.3	+5.1%	242.1	23.5x	1.1x
ACMEPL	13.0	+4.8%	24.2	NM	0.7x
EXIMBANK	6.8	+4.6%	5.0	NM	0.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MAKSONSPIN	7.4	-6.3%	8.5	NM	0.6x
ZEALBANGLA	104.0	-5.1%	1.0	NM	NM
ACFL	18.1	-4.7%	4.3	NM	0.5x
ATLASBANG	53.5	-4.6%	0.1	NM	0.5x
JUTESPINN	260.8	-4.5%	2.0	NM	NM
ICB3RDNRB	4.6	-4.2%	0.3	NM	0.8x
NEWLIN	9.7	-4.0%	4.5	18.7x	0.4x
PF1STMF	5.5	-3.5%	0.8	NM	0.9x
MEGHNAINS	27.8	-3.5%	15.9	24.0x	2.0x
GSPFINANCE	6.0	-3.2%	0.5	NM	0.3x

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%	18.1x	1.2x
BXPHERMA	32,479	2.4%	6.5x	0.8x
BRACBANK	32,157	2.4%	7.7x	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%	3.4x	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%	16.8x	2.7x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	47.6x	0.4x
ROBI	10,738	0.8%	24.9x	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	14.3	+5.1%	242.1	23.5x	1.1x
GENEXIL	31.6	+1.9%	121.7	12.7x	1.5x
BSC	93.8	+0.3%	107.8	4.9x	0.9x
AGNISYSL	26.7	-1.8%	96.9	22.4x	1.6x
KBPPWBIL	148.3	-2.8%	96.6	NM	12.5x
LOVELLO	89.1	-0.9%	94.9	48.5x	6.9x
BXPHERMA	86.9	+3.3%	85.5	6.5x	0.8x
EMERALDOIL	31.4	+8.7%	82.7	24.2x	NM
INTRACO	20.0	+4.2%	75.1	24.1x	1.6x
SONALIANS	251.6	-1.7%	73.4	77.9x	4.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
AIL	93.0	86.0	11.0	524	46.34
EIL	59.0	50.5	9.0	673	38.32
BEACHHATCH	95.5	93.0	12.0	265	25.13
ALARABANK	19.5	19.5	1.0	1,109	21.63
TRUSTBANK	23.2	23.2	13.0	879	20.38
FINEFOODS	227.0	192.3	7.0	61	12.68
LOVELLO	90.7	86.0	3.0	100	8.67
KBPPWBIL	138.7	137.9	4.0	50	6.91
RELIANCE1	19.8	19.5	4.0	260	5.11
CRYSTALINS	58.0	58.0	1.0	60	3.48

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
AIL	93.0	86.0	46.3	524	11
EIL	59.0	50.5	38.3	673	9
BEACHHATCH	95.5	93.0	25.1	265	12
ALARABANK	19.5	19.5	21.6	1,109	1
TRUSTBANK	23.2	23.2	20.4	879	13
FINEFOODS	227.0	192.3	12.7	61	7
LOVELLO	90.7	86.0	8.7	100	3
KBPPWBIL	138.7	137.9	6.9	50	4
RELIANCE1	19.8	19.5	5.1	260	4
CRYSTALINS	58.0	58.0	3.5	60	1
NLTUBES	78.0	77.1	2.8	36	2
MIDLANDBNK	32.1	32.0	2.6	80	2
CENTRALINS	47.7	46.8	2.4	52	4
QUASEMIND	23.0	23.0	2.1	90	1
AL-HAJTEX	109.0	109.0	1.1	10	1
UNIONCAP	6.0	6.0	1.0	169	1
BEXIMCO	99.1	99.1	0.8	9	1
BEXIMCO	99.1	99.1	0.8	9	1
PRIMEFIN	4.0	4.0	0.8	201	1
1STPRIMFMF	44.0	44.0	0.8	18	1
INTRACO	18.5	18.5	0.6	35	1
CONFIDCEM	67.0	67.0	0.6	10	1
<b>Total</b>			<b>206.8</b>		<b>85</b>

**Important DSE News**
**DSSL**

The Board of Directors has recommended 1% Cash Dividend (excluding Sponsors and Directors) for the year ended June 30, 2024. Date of AGM: 31.12.2024, Time: 11:00 AM. Record Date: 19.12.2024. The Company has also reported EPS of Tk. 0.12, NAV per share of Tk. 18.12 and NOCFPS of Tk. 0.05 for the year ended June 30, 2024 as against Tk. 0.53, Tk. 18.06 and Tk. 0.07 respectively for the year ended June 30, 2023.

**MAKSONSPIN**

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 17.02.2025, Time: 11:00 AM, Venue: Hybrid System, Venue for physical presence: Maksons Group Conference Hall, (Situated at Maksons Spinning Mills PLC.): Holding-87, Ward-5, Block-B, Shahid Minnat Ali Road-4, Gouripur, Ashulia, Savar, Dhaka. Digital Link: <https://maksonsspining.bdvirtualagm.com>. Record Date: 29.12.2024. The Company has also reported EPS of Tk. (3.69), NAV per share of Tk. 12.29 and NOCFPS of Tk. (2.57) for the year ended June 30, 2024 as against Tk. (3.93), Tk. 16.11 and Tk. 0.24 respectively for the year ended June 30, 2023.

The Company will be placed in 'Z' category from existing 'A' category with effect from December 01, 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.

**GIB**

**(Q3 Un-audited):** EPS was Tk. (0.55) for July-September, 2024 as against Tk. 0.44 (restated) for July-September, 2023; EPS was Tk. 0.43 for January-September, 2024 as against Tk. 1.15 (restated) for January-September, 2023. NOCFPS was Tk. (9.92) for January-September, 2024 as against Tk. (9.63) for January-September, 2023. NAV per share was Tk. (9.14) as on September 30, 2024 and Tk. 13.79 as on September 30, 2023.

**RINGSHINE**

**(Q1 Un-audited):** EPS was Tk. (0.79) for July-September 2024 as against Tk. (0.86) for July-September 2023. NOCFPS was Tk. (0.88) for July-September 2024 as against Tk. 0.70 for July-September 2023. NAV per share was Tk. (8.82) as on September 30, 2024 and Tk. (8.03) as on June 30, 2024. EPS for the 1st Quarter, of 2024 has improved as the company has achieved 137% export growth during the period.

**FASFIN**

**(Q1 Un-audited):** Consolidated EPS was Tk. (4.43) for January-March 2024 as against Tk. (4.85) for January-March 2023. Consolidated NOCFPS was Tk. (0.24) for January-March 2024 as against Tk. (0.28) for January-March 2023. Consolidated NAV per share was Tk. (109.89) as on March 31, 2024 and Tk. (91.01) as on March 31, 2023.

**(Q2 Un-audited):** Consolidated EPS was Tk. (9.84) for January-June 2024 as against Tk. (9.30) for January-June 2023. Consolidated NOCFPS was Tk. (0.78) for January-June 2024 as against Tk. (1.62) for January-June 2023. Consolidated NAV per share was Tk. (115.35) as on June 30, 2024 and Tk. (95.42) as on June 30, 2023. The Company has further informed that Consolidated EPS was Tk. (5.41) for April-June 2024 as against Tk. (2.64) for April-June 2023.

**(Q3 Un-audited):** Consolidated EPS was Tk. (15.24) for January-September, 2024 as against Tk. (13.63) for January-September, 2023. Consolidated NOCFPS was Tk. (0.89) for January-September 2024 as against Tk. (1.77) for January-September 2023. Consolidated NAV per share was Tk. (120.74) as on September 30, 2024 and Tk. (99.75) as on September 30, 2023. The Company has further informed that Consolidated EPS was Tk. (5.41) for July-September 2024 as against Tk. (4.33) for July-September 2023.

**GHCL**

**(Q1 Un-audited):** EPS was Tk. (1.10) for July-September 2024 as against Tk. (1.99) for July-September 2023; NOCFPS was Tk. 0.61 for July-September 2024 as against Tk. 0.61 for July-September 2023. NAV per share was Tk. 72.99 as on September 30, 2024 and Tk. 74.08 as on June 30, 2024.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
FASFIN		0.0%	0%	Record Date	1-Dec-24
SPCL		0.0%	12%	Record Date	2-Dec-24
BESTHLDNG		0.0%	10%	Record Date	2-Dec-24
FUWANGFOOD		0.0%	0%	Record Date	2-Dec-24
AMBEEPHA		0.0%	10%	Record Date	2-Dec-24
EGEN		0.0%	10%	Record Date	3-Dec-24

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