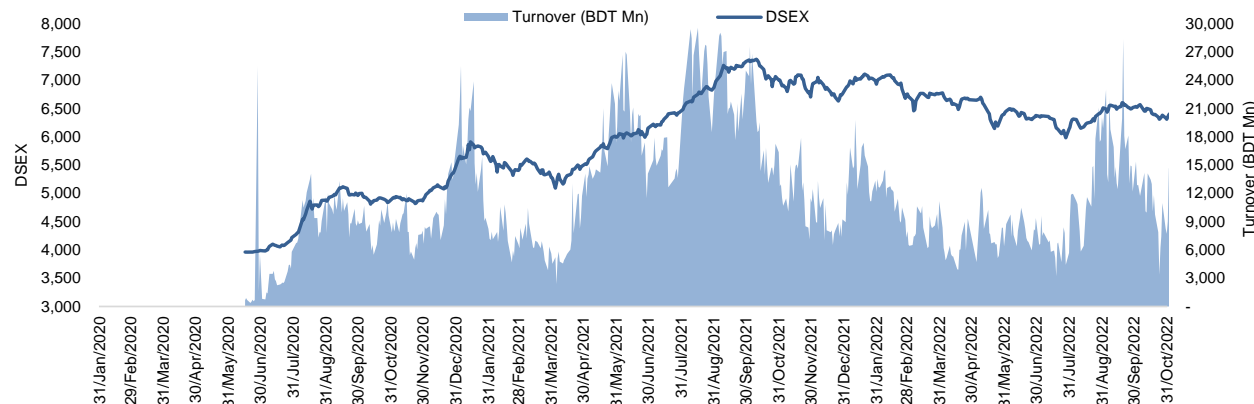


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.38%) gained 23.49 points and closed at 6,235.95. The blue-chip index DS30 (+0.62%), the Shariah-based index DSES (+0.79%), and the large-cap index CDSET (+0.56%) closed at 2,214.33, 1,370.18, and 1,223.16 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.73% followed by Food & Allied (+0.06%), Fuel & Power (+0.06%), Engineering (+0.05%), Bank (+0.02%), NBF (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 8.1% of the overall market turnover. aamra networks limited (+7.3%) was the most traded share with a turnover of BDT 245 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,235.95	6,212.46	+23.49	+0.38%	-7.7%
DS30	2,214.33	2,200.68	+13.65	+0.62%	-12.6%
DSES	1,370.18	1,359.43	+10.75	+0.79%	-4.3%
CDSET	1,223.16	1,216.37	+6.79	+0.56%	-10.0%

	Advanced	Declined	Unchanged	Total
All Category	51	31	227	309
A Category (Equity)	35	25	159	219
B Category (Equity)	13	3	55	71
N Category (Equity)	2	2	3	7
Z Category (Equity)	1	1	10	12
Mutual Funds	0	0	17	17
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,642,411	7,631,540	+0.1%
	Mn USD	74,026	73,920	
Turnover	Mn BDT	4,494	3,340	+34.5%
	Mn USD	44	32	
Volume	Mn Shares	68	48	+42.4%
	No. of Trade	94,512	85,467	+10.6%

* Average Interbank Exchange Rate is BDT 103.24 as of Nov 29, 2022

Fahim Hassan Research Associate (880) 1709636546 fahim.hassan@bracepl.com	Md. Tanvir Ahmed Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
---	--

Figure: Sectorial Turnover (BDT)

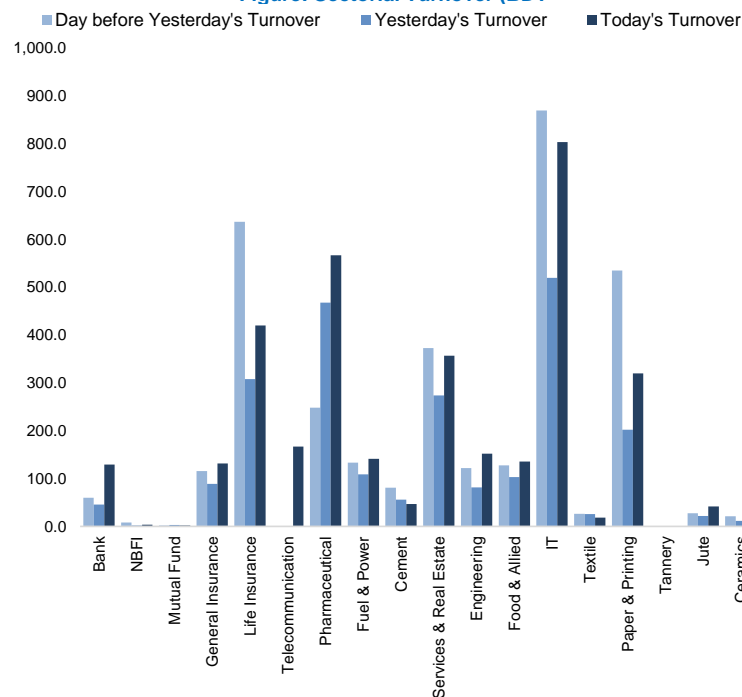
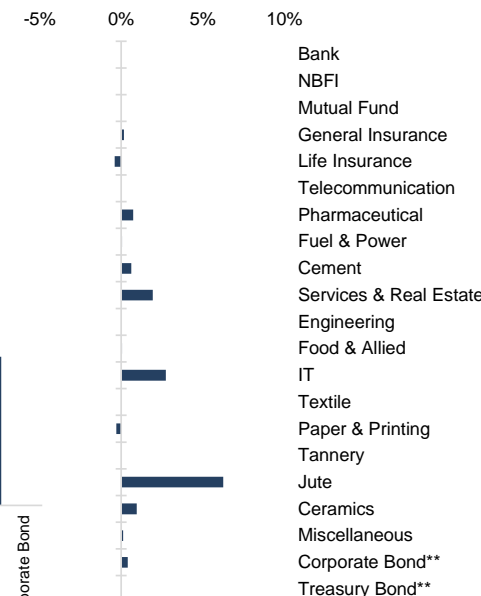


Figure: Sectorial Mcap Change



Market PE 16.9x

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	1,426	+0.22	+0.02%	34	666,171	8.7%	129.5	3.4%	7.7x	0.7x	GP	386,996	8.6%	0.3	11.2x	9.1x
NBFI	1,921	1,921	-	-	23	187,451	2.5%	3.5	0.1%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	1.6	0.0%	NM	0.8x	BATBC	280,098	6.2%	0.2	16.8x	6.7x
General Insurance	3,196	3,191	+5.55	+0.17%	41	92,693	1.2%	131.8	3.5%	15.7x	1.5x	SQURPHARMA	185,977	4.1%	6.1	10.0x	1.7x
Life Insurance	2,508	2,518	-9.86	-0.39%	14	70,348	0.9%	420.0	11.0%	NM	NM	ROBI	157,138	3.5%	166.5	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	166.8	4.4%	15.4x	4.9x	RENATA	139,689	3.1%	0.3	28.1x	4.6x
Pharmaceutical	3,789	3,761	+27.61	+0.73%	33	725,877	9.5%	566.4	14.8%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,699	1,698	+0.96	+0.06%	23	447,910	5.9%	141.1	3.7%	14.4x	1.1x	BEXIMCO	101,302	2.3%	146.4	8.2x	1.2x
Cement	2,350	2,335	+14.51	+0.62%	7	112,856	1.5%	46.8	1.2%	33.4x	2.5x	BERGERPBL	79,380	1.8%	0.0	25.8x	6.9x
Services & Real Estate	1,812	1,777	+34.60	+1.95%	8	71,590	0.9%	356.9	9.4%	40.5x	0.9x	LHBL	76,651	1.7%	46.2	18.7x	4.1x
Engineering	4,493	4,491	+2.05	+0.05%	42	527,390	6.9%	151.8	4.0%	27.6x	1.8x	ICB	74,135	1.7%	0.9	68.1x	1.6x
Food & Allied	21,209	21,196	+12.74	+0.06%	21	377,909	5.0%	135.4	3.5%	21.4x	7.4x	BEACONPHAR	69,947	1.6%	40.0	86.0x	11.3x
IT	3,146	3,062	+83.77	+2.74%	11	41,018	0.5%	803.1	21.1%	29.2x	2.8x	BXPBARMA	69,192	1.5%	160.2	13.6x	1.6x
Textile	1,632	1,632	+0.18	+0.01%	58	171,650	2.3%	18.5	0.5%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,798	10,830	-31.43	-0.29%	6	41,605	0.5%	319.9	8.4%	46.8x	2.1x	ISLAMIBANK	52,647	1.2%	96.9	10.7x	0.8x
Tannery	3,075	3,075	-	-	6	33,108	0.4%	0.1	0.0%	40.2x	3.1x	DUTCHBANGL	43,554	1.0%	0.3	7.4x	1.1x
Jute	12,425	11,694	+731.50	+6.26%	3	3,040	0.0%	41.9	1.1%	NM	107.2x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	695	688	+6.61	+0.96%	5	32,146	0.4%	68.6	1.8%	33.5x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,072	4,067	+4.58	+0.11%	15	228,413	3.0%	310.8	8.1%	12.5x	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%	0.0	14.9x	3.4x
Treasury Bond**	99	99	+0.03	+0.03%	250	3,140,137	41.2%	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
MONNOCERA	109.9	+8.0%	68.5	NM	1.3x	SQURPHARMA	121,685	7.2%	10.0x	1.7x	AAMRANET	54.6	+7.3%	244.9	23.8x	1.5x
JUTESPINN	249.2	+7.8%	8.9	NM	NM	BATBC	74,086	4.4%	16.8x	6.7x	GENEXIL	92.3	+1.9%	205.2	26.7x	5.1x
MONNOAGML	650.2	+7.5%	71.0	NM	3.7x	BEXIMCO	70,355	4.2%	8.2x	1.2x	CLICL	68.1	-5.4%	202.6	NM	NM
GEMINISEA	399.1	+7.5%	50.9	29.1x	21.7x	RENATA	68,196	4.0%	28.1x	4.6x	BPML	76.3	-0.7%	178.4	20.5x	1.0x
SONALIANS	785.3	+7.5%	32.9	NM	3.4x	BEACONPHAR	48,963	2.9%	86.0x	11.3x	ROBI	30.0	-	166.5	NM	2.4x
AAMRANET	54.6	+7.3%	244.9	23.8x	1.5x	BXPBARMA	48,310	2.9%	13.6x	1.6x	BXPBARMA	155.1	+4.2%	160.2	13.6x	1.6x
UNIQUEHRL	59.5	+5.3%	83.7	15.9x	1x	GP	38,700	2.3%	11.2x	9.1x	BEXIMCO	115.6	-	146.4	8.2x	1.2x
AAMRATECH	41.1	+5.1%	71.4	26.3x	1.8x	BRACBANK	30,976	1.8%	10.9x	1.0x	NAVANAPHAR	91.7	+1.2%	121.6	24.4x	2.0x
ADVENT	27.4	+5.0%	99.3	25.7x	1.9x	LHBL	27,073	1.6%	18.7x	4.1x	SEAPEARL	187.1	+1.8%	119.4	69.3x	14.4x
PAPERPROC	214.9	+4.4%	43.2	45.6x	6.6x	EBL	23,659	1.4%	7.6x	1.0x	BSC	115.0	+1.2%	105.8	8.0x	1.5x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	485.1	-7.5%	7.9	NM	32.8x	PUBALIBANK	18,243	1.1%	5.4x	0.6x	BEXIMCO	115.3	104.1	176.0	2,864	309.93
CLICL	68.1	-5.4%	202.6	NM	NM	CITYBANK	17,615	1.0%	4.5x	0.8x	RENATA	1,218.0	1,141.8	4.0	82	99.40
APEXFOODS	271.4	-3.3%	44.4	41.9x	2.1x	ROBI	15,714	0.9%	NM	2.4x	SQURPHARMA	209.8	201.0	65.0	460	95.36
BDWELDING	31.3	-2.8%	24.1	NM	2.7x	ALARABANK	14,609	0.9%	14.6x	1.1x	PRAGATILIF	111.3	111.3	1.0	192	21.37
PROGRESLIF	77.5	-2.5%	14.5	NM	NM	OLYMPIC	14,578	0.9%	19.1x	2.4x	AAMRANET	52.0	51.2	6.0	365	18.82
PADMALIFE	51.1	-1.9%	75.6	NM	NM	BSRMLTD	14,417	0.9%	8.7x	0.7x	METROSPIN	44.0	42.0	8.0	395	17.22
FAREASTLIF	77.3	-1.3%	24.8	NM	NM	ORIONPHARM	13,657	0.8%	21.2x	0.9x	SEAPEARL	200.0	177.1	2.0	91	16.19
PRIMELIFE	55.2	-1.3%	1.6	NM	NM	UPGDCL	13,547	0.8%	13.6x	3.8x	BATBC	479.8	479.8	29.0	34	16.18
SONALIPAPR	658.4	-1.0%	56.3	70.4x	3.8x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	ACIFORMULA	168.0	140.5	2.0	69	10.48
AMBEEPHA	499.9	-1.0%	6.6	NM	22.5x						JUTESPINN	215.0	215.0	1.0	31	6.56

* 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
BEXIMCO	115.3	104.1	309.9	2,864	176
RENATA	1,218.0	1,141.8	99.4	82	4
SQURPHARMA	209.8	201.0	95.4	460	65
PRAGATILIF	111.3	111.3	21.4	192	1
AAMRANET	52.0	51.2	18.8	365	6
METROSPIN	44.0	42.0	17.2	395	8
SEAPEARL	200.0	177.1	16.2	91	2
BATBC	479.8	479.8	16.2	34	29
ACIFORMULA	168.0	140.5	10.5	69	2
JUTESPINN	215.0	215.0	6.6	31	1
BRACBANK	35.0	34.7	5.9	170	5
ACFL	26.2	26.1	5.0	192	2
SONALIPAPR	712.0	712.0	5.0	7	1
PURABIGEN	29.1	29.1	4.4	150	1
HRTEX	116.0	104.4	3.2	28	2
EGEN	62.0	62.0	3.1	50	2
BSCCL	199.8	199.8	3.0	15	5
PHARMAID	777.7	731.4	2.4	3	2
CONFIDCEM	84.3	84.2	2.0	24	4
SPCL	67.0	64.0	2.0	30	2
ROBI	28.5	28.5	1.9	66	3
ORIONINFU	490.0	485.2	1.7	3	2
Total			678.9		364

Important DSE News
PREMIERLEA

(Q1 Un-audited): Consolidated EPS was Tk. (2.42) for January-March 2022 as against Tk. (1.64) for January-March 2021; Consolidated NOCFPS was Tk. 2.32 for January-March 2022 as against Tk. 0.44 for January-March 2021. Consolidated NAV per share was Tk. (4.58) as on March 31, 2022 and Tk. 14.38 as on March 31, 2021.

(Q2 Un-audited): Consolidated EPS was Tk. (2.99) for April-June 2022 as against Tk. (1.32) for April-June 2021; Consolidated EPS was Tk. (5.40) for January-June 2022 as against Tk. (2.96) for January-June 2021. Consolidated NOCFPS was Tk. 4.49 for January-June 2022 as against Tk. (0.02) for January-June 2021. Consolidated NAV per share was Tk. (7.65) as on June 30, 2022 and Tk. 13.13 as on June 30, 2021.

(Q3 Un-audited): Consolidated EPS was Tk. (0.92) for July-September 2022 as against Tk. (3.37) for July-September 2021; Consolidated EPS was Tk. (6.32) for January-September, 2022 as against Tk. (6.33) for January-September, 2021. Consolidated NOCFPS was Tk. 6.11 for January-September 2022 as against Tk. 3.35 for January-September 2021. Consolidated NAV per share was Tk. (8.57) as on September 30, 2022 and Tk. 9.81 as on September 30, 2021.

SILCOPHL

(Q1 Un-audited): EPS was Tk. 0.29 for July-September 2022 as against Tk. 0.34 for July-September 2021; NOCFPS was Tk. 0.40 for July-September 2022 as against Tk. 0.38 for July-September 2021. NAV per share was Tk. 22.28 as on September 30, 2022 and Tk. 21.95 as on June 30, 2022.

PTL

(Q1 Un-audited): Consolidated EPS was Tk. 1.62 for July-September 2022 as against Tk. 1.45 for July-September 2021; Consolidated NOCFPS was Tk. 3.66 for July-September 2022 as against Tk. 1.55 for July-September 2021. Consolidated NAV per share was Tk. 31.19 as on September 30, 2022 and Tk. 29.60 as on June 30, 2022.

DACCADYE

(Q1 Un-audited): EPS was Tk. 0.03 for July-September 2022 as against Tk. 0.31 for July-September 2021; NOCFPS was Tk. 0.57407 for July-September 2022 as against Tk. 0.31452 for July-September 2021. NAV per share was Tk. 34.67 as on September 30, 2022 and Tk. 34.64 as on June 30, 2022.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BD Thai Food & Beverage Limited	-	0.0%	3.0%	Record Date	1-Dec-22
Kohinoor Chemicals Company (Bangladesh) Ltd.	-	20.0%	20.0%	Record Date	1-Dec-22
Investment Corporation Of Bangladesh	-	5.0%	5.0%	Record Date	1-Dec-22
Fu Wang Food Ltd.	-	0.0%	0.0%	Record Date	1-Dec-22
Salvo Chemical Industry Limited	-	0.0%	10.0%	Record Date	4-Dec-22
Orion Pharma Ltd.	-	0.0%	10.0%	Record Date	4-Dec-22
Orion Infusion Ltd.	-	10.0%	10.0%	Record Date	4-Dec-22
Rangpur Dairy & Food Products Ltd.	-	0.0%	5.0%	Record Date	5-Dec-22
Esquire Knit Composite Limited	-	0.0%	10.0%	Record Date	5-Dec-22
Silco Pharmaceuticals Limited	-	0.0%	5.0%	Record Date	5-Dec-22
Padma Oil Co. Ltd.	-	0.0%	125.0%	Record Date	5-Dec-22
Atlas Bangladesh Ltd.	-	0.0%	0.0%	Record Date	5-Dec-22
Confidence Cement Ltd.	-	5.0%	5.0%	Record Date	5-Dec-22

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.