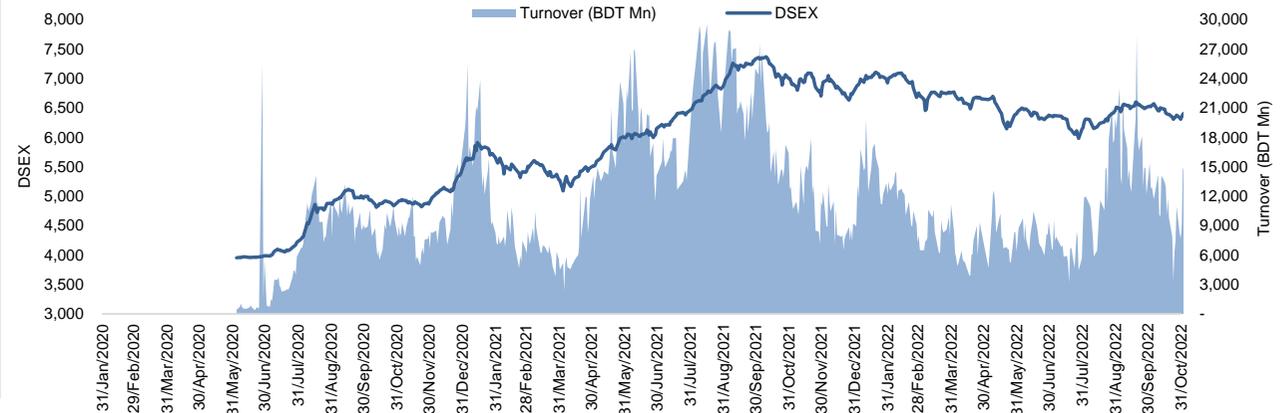


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.81%) lost 50.75 points and closed at 6,215.24. The blue-chip index DS30 (-0.89%), the Shariah-based index DSES (-1.12%), and the large-cap index CDSET (-0.69%) closed at 2,180.40, 1,348.86, and 1,205.61 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 1.36% followed by Engineering (-0.25%), Fuel & Power (-0.24%), Food & Allied (-0.12%), Bank (-0.10%), Telecommunication (0.00%), and NBF1 (+0.02%), respectively. Block trades contributed 3.1% of the overall market turnover. Orion Pharma Ltd. (-9.0%) was the most traded share with a turnover of BDT 349 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,215.24	6,265.99	-50.75	-0.81%	-8.0%
DS30	2,180.40	2,199.91	-19.51	-0.89%	-13.9%
DSES	1,348.86	1,364.18	-15.32	-1.12%	-5.7%
CDSET	1,205.61	1,213.94	-8.33	-0.69%	-11.3%

	Advanced	Declined	Unchanged	Total
All Category	20	68	221	309
A Category (Equity)	17	52	153	222
B Category (Equity)	1	12	52	65
N Category (Equity)	1	3	4	8
Z Category (Equity)	1	1	12	14
Mutual Funds	0	0	14	14
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,642,081	7,670,800	-0.4%
	Mn USD	73,708	73,985	
Turnover	Mn BDT	4,229	5,521	-23.4%
	Mn USD	41	53	
Volume	Mn Shares	69	95	-28.2%
	No. of Trade	103,569	118,523	-12.6%

* Average Interbank Exchange Rate is BDT 103.68 as of Nov 17, 2022

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Figure: Sectorial Turnover (BDT)

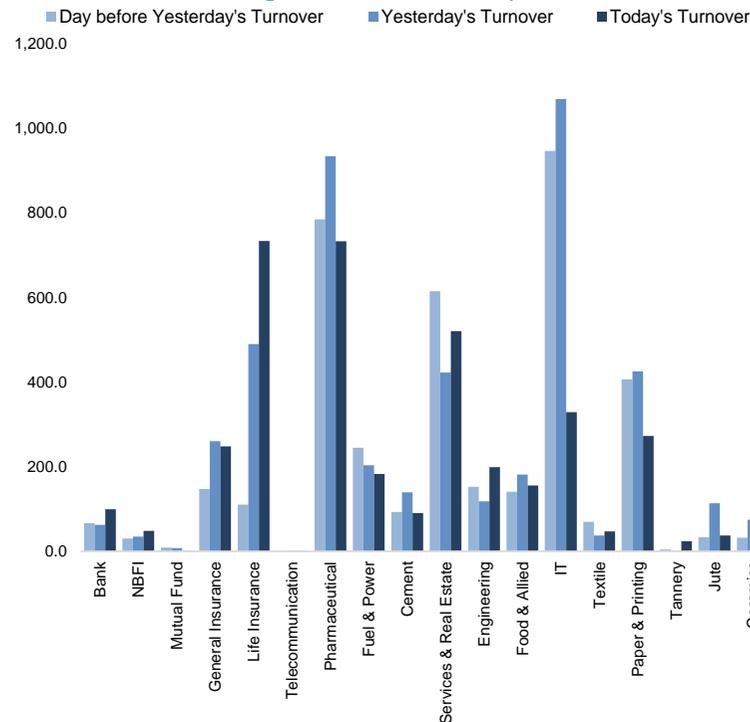
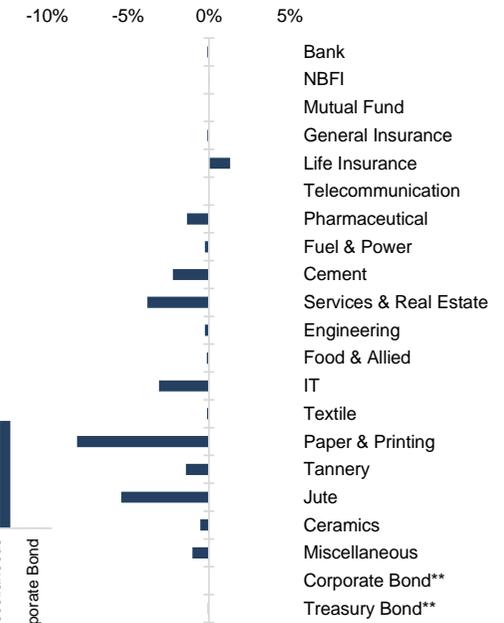


Figure: Sectorial Mcap Change



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	1,427	1,428	-1.41	-0.10%	34	666,471	8.7%	99.4	2.5%	7.8x	0.7x	GP	386,996	8.6%	0.2	11.2x	9.1x
NBFI	1,923	1,923	+0.37	+0.02%	23	187,626	2.5%	48.4	1.2%	NM	4.3x	WALTONHIL	317,378	7.1%	3.2	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	0.6	0.0%	NM	0.8x	BATBC	280,098	6.3%	5.0	16.8x	6.7x
General Insurance	3,213	3,217	-3.30	-0.10%	41	93,188	1.2%	247.9	6.2%	15.8x	1.5x	SQURPHARMA	186,066	4.2%	63.6	10.0x	1.7x
Life Insurance	2,543	2,510	+32.93	+1.31%	14	71,322	0.9%	733.4	18.3%	NM	NM	ROBI	157,138	3.5%	0.0	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.3	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,739	3,790	-51.47	-1.36%	33	716,300	9.4%	732.4	18.3%	18.4x	2.4x	UPGDCL	135,475	3.0%	13.1	13.6x	3.8x
Fuel & Power	1,694	1,699	-4.09	-0.24%	23	447,940	5.9%	182.8	4.6%	14.4x	1.1x	BEXIMCO	101,302	2.3%	8.5	8.2x	1.2x
Cement	2,340	2,393	-53.20	-2.22%	7	112,391	1.5%	90.4	2.3%	33.3x	2.5x	BERGERPBL	79,380	1.8%	0.1	25.8x	6.9x
Services & Real Estate	1,787	1,858	-70.64	-3.80%	8	70,599	0.9%	519.6	13.0%	40.0x	0.9x	MARICO	76,277	1.7%	0.2	21.3x	44.9x
Engineering	4,490	4,501	-11.30	-0.25%	42	527,074	6.9%	198.7	5.0%	27.6x	1.8x	ICB	74,135	1.7%	0.2	68.1x	1.6x
Food & Allied	21,155	21,181	-26.06	-0.12%	21	376,948	4.9%	155.6	3.9%	21.4x	7.4x	BXPBARMA	65,489	1.5%	15.2	12.8x	1.6x
IT	3,281	3,385	-104.31	-3.08%	11	42,774	0.6%	328.7	8.2%	30.5x	2.9x	BEACONPHAR	58,143	1.3%	13.7	71.5x	9.4x
Textile	1,635	1,636	-1.89	-0.12%	58	171,937	2.3%	46.8	1.2%	31.3x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	11,939	12,998	-1059.49	-8.15%	6	46,000	0.6%	272.8	6.8%	51.8x	2.3x	ISLAMIBANK	52,969	1.2%	8.3	10.8x	0.8x
Tannery	3,015	3,059	-43.58	-1.42%	6	32,466	0.4%	23.5	0.6%	39.3x	3.0x	DUTCHBANGL	43,554	1.0%	0.3	7.4x	1.1x
Jute	11,538	12,198	-659.88	-5.41%	3	2,822	0.0%	37.4	0.9%	NM	99.6x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	692	696	-3.75	-0.54%	5	32,003	0.4%	31.1	0.8%	33.4x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,072	4,114	-41.80	-1.02%	15	228,423	3.0%	254.1	6.3%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	90	90	-	-	9	36,970	0.5%	0.4	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	99	99	-0.06	-0.06%	250	3,144,891	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
PRAGATILIF	107.1	+10.0%	82.0	NM	NM	SQURPHARMA	121,743	7.2%	10.0x	1.7x	ORIONPHARM	85.0	-9.0%	349.1	21.0x	0.9x
PROGRESLIF	85.2	+9.9%	40.8	NM	NM	BATBC	74,086	4.4%	16.8x	6.7x	SEAPEARL	179.0	-3.1%	180.5	66.3x	13.8x
CLICL	44.9	+9.8%	1.3	NM	NM	BEXIMCO	70,355	4.2%	8.2x	1.2x	NAVANAPHAR	90.9	-10.0%	180.5	24.2x	1.9x
PRIMELIFE	61.6	+5.3%	21.1	NM	NM	RENATA	68,196	4.1%	28.1x	4.6x	PADMALIFE	60.4	+5.2%	173.7	NM	NM
PADMALIFE	60.4	+5.2%	173.7	NM	NM	BXPBARMA	45,725	2.7%	12.8x	1.6x	EHL	84.0	-10.0%	149.9	13.6x	1.1x
POPULARLIF	69.6	+1.6%	34.1	NM	NM	BEACONPHAR	40,700	2.4%	71.5x	9.4x	BPML	96.9	-9.9%	145.7	26.0x	1.3x
NHFIL	43.3	+1.4%	45.6	20.3x	2x	GP	38,700	2.3%	11.2x	9.1x	INTRACO	41.7	-5.0%	141.3	33.8x	3.3x
DELTALIFE	140.5	+1.3%	102.2	NM	NM	BRACBANK	30,976	1.8%	10.9x	1.0x	SAPORTL	34.3	-3.9%	124.3	24.0x	1.0x
RUPALILIFE	80.7	+1.3%	18.7	NM	NM	LHBL	26,909	1.6%	18.6x	4.1x	DELTALIFE	140.5	+1.3%	102.2	NM	NM
ASIAINS	51.3	+1.2%	25.7	17.3x	1.9x	ISLAMIBANK	23,794	1.4%	10.8x	0.8x	AAMRATECH	42.6	+0.2%	90.4	25.7x	1.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NAVANAPHAR	90.9	-10.0%	180.5	24.2x	1.9x	PADMALIFE	58.0	51.7	5.0	1,668	86.95
EHL	84.0	-10.0%	149.9	13.6x	1x	BATBC	496.5	480.0	23.0	54	26.21
BPML	96.9	-9.9%	145.7	26.0x	1.3x	BEXIMCO	115.6	105.0	25.0	232	25.42
ADNTEL	108.9	-9.7%	39.9	36.7x	3.8x	BSCCL	213.6	199.8	15.0	100	20.55
BDCOM	35.3	-9.5%	47.3	24.4x	2.2x	SEAPEARL	203.0	177.0	6.0	43	8.01
KDSALTD	78.8	-9.3%	75.3	31.8x	3.0x	FORTUNE	80.1	71.6	3.0	83	6.53
SINOBANGLA	70.9	-9.1%	90.2	38.3x	2.5x	PTL	78.0	69.7	7.0	85	6.09
ORIONPHARM	85.0	-9.0%	349.1	21.0x	0.9x	EHL	102.1	85.2	3.0	55	5.47
PAPERPROC	193.5	-8.7%	40.0	41.1x	6.0x	INTRACO	48.0	48.0	1.0	60	2.88
MONOSPOOL	282.5	-8.7%	36.9	42.2x	6.1x	SALVOCHEM	64.0	61.9	2.0	44	2.77

* 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
PADMALIFE	58.0	51.7	86.9	1,668	5
BATBC	496.5	480.0	26.2	54	23
BEXIMCO	115.6	105.0	25.4	232	25
BSCCL	213.6	199.8	20.6	100	15
SEAPEARL	203.0	177.0	8.0	43	6
FORTUNE	80.1	71.6	6.5	83	3
PTL	78.0	69.7	6.1	85	7
EHL	102.1	85.2	5.5	55	3
INTRACO	48.0	48.0	2.9	60	1
SALVOCHEM	64.0	61.9	2.8	44	2
BRACBANK	34.8	34.7	2.3	65	3
GENNEXT	5.4	5.4	2.2	411	1
BPML	103.0	98.6	2.2	22	2
KDSALTD	90.0	83.3	2.0	23	2
MALEKSPIN	24.5	24.5	1.7	71	2
EGEN	67.3	62.0	1.7	27	2
RENATA	1,150.0	1,150.0	1.7	1	1
CVOPRL	147.4	147.4	1.6	11	2
ISNLTD	60.0	60.0	1.5	25	2
IPDC	51.9	51.9	1.3	25	2
BSC	126.0	126.0	1.1	9	2
AL-HAJTEX	141.9	141.9	1.1	8	1
Total			224.6		133

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Monno Fabrics Limited	-	0.0%	2.0%	Record Date	21-Nov-22
Crown Cement PLC	-	0.0%	10.0%	Record Date	21-Nov-22
Bangladesh Export Import Company Ltd.	-	0.0%	30.0%	Record Date	21-Nov-22
Bangladesh Autocars Ltd.	-	0.0%	4.0%	Record Date	21-Nov-22
Monno Agro & General Machinery Limited	-	0.0%	15.0%	Record Date	21-Nov-22
Shepherd Industries Limited	-	0.0%	10.0%	Record Date	21-Nov-22
Monno Ceramic Industries Ltd.	-	0.0%	10.0%	Record Date	21-Nov-22
Sonargaon Textiles Ltd.	-	0.0%	1.0%	Record Date	21-Nov-22
Bengal Windsor Thermoplastics Ltd.	-	0.0%	5.0%	Record Date	21-Nov-22
Coppertech Industries Limited	-	4.0%	4.0%	Record Date	21-Nov-22
Usmania Glass Sheet Factory Limited	-	0.0%	0.0%	Record Date	21-Nov-22
Beximco Pharmaceuticals Ltd.	-	0.0%	35.0%	Record Date	21-Nov-22
Shinepukur Ceramics Limited	-	0.0%	3.0%	Record Date	21-Nov-22
Dulamia Cotton Spinning Mills Ltd.	-	0.0%	0.0%	Record Date	21-Nov-22
Paramount Textile Limited	-	0.0%	10.0%	Record Date	21-Nov-22
Saiham Cotton Mills Limited	-	0.0%	11.0%	Record Date	21-Nov-22
Al-Haj Textile Mills Limited	-	0.0%	3.0%	Record Date	21-Nov-22

Important DSE News
FUWANGCER

The Board of Directors has recommended 2% cash dividend for all the shareholders other than Sponsors/Directors for the year ended June 30, 2022. The Sponsors/Directors hold 4,08,76,546 shares out of total 13,62,69,093 shares of the Company and the cash dividend to be payable to the general shareholders is Tk. 1,90,78,509.00. Date of AGM: 31.12.2022, Time: 11:30 AM, Venue: Digital Platform. Record date: 08.12.2022. The Company has also reported EPS of Tk. 0.23, NAV per share of Tk. 11.78 and NOCFPS of Tk. (3.27) for the year ended June 30, 2022 as against Tk. 0.34, Tk. 11.70 and Tk. 0.51 respectively for the same period of the previous year.

DSHGARME

(Q1 Un-audited): EPS was Tk. 0.13 for July-September, 2022 as against Tk. 0.26 for July-September, 2021. NOCFPS was Tk. 5.13 for July-September, 2022 as against Tk. 1.88 for July-September, 2021. NAV per share was Tk. 19.56 as on September 30, 2022 and Tk. 19.45 as on June 30, 2022.

ICB

(Q1 Un-audited): Consolidated EPS was Tk. 0.26 for July-September 2022 as against Tk. 0.70 for July-September 2021; Consolidated NOCFPS was Tk. (0.76) for July-September 2022 as against Tk. (8.87) for July-September 2021. Consolidated NAV per share was Tk. 55.92 as on September 30, 2022 and Tk. 55.59 as on June 30, 2022.

GQBALLPEN

(Q1 Un-audited): EPS was Tk. (1.04) for July-September 2022 as against Tk. (0.91) for July-September 2021; NOCFPS was Tk. 0.01 for July-September 2022 as against Tk. 0.03 for July-September 2021. NAV per share was Tk. 133.80 as on September 30, 2022 and Tk. 136.31 as on June 30, 2022.

SALVOCHEM

(Q1 Un-audited): EPS was Tk. 0.63 for July-September 2022 as against Tk. 0.55 for July-September 2021; NOCFPS was Tk. 0.25 for July-September 2022 as against Tk. 1.28 for July-September 2021. NAV per share was Tk. 15.16 as on September 30, 2022 and Tk. 14.58 as on June 30, 2022.

SAMATALETH

(Q3 Un-audited): EPS was Tk. 0.01 for January-March 2022 as against Tk. (0.02) for January-March 2021; EPS was Tk. (0.03) for July 2021-March 2022 as against Tk. (0.03) for July 2020-March 2021. NOCFPS was Tk. 0.41 for July 2021-March 2022 as against Tk. 0.25 for July 2020-March 2021. NAV per share was Tk. 14.27 as on March 31, 2022 and Tk. 14.39 as on June 30, 2021.

AFCAGRO

(Q1 Un-audited): EPS was Tk. 0.15 for July-September 2022 as against Tk. 0.29 for July-September 2021; NOCFPS was Tk. 0.08 for July-September 2022 as against Tk. (1.52) for July-September 2021. NAV per share was Tk. 18.34 as on September 30, 2022 and Tk. 18.19 as on June 30, 2022.

ACTIVEFINE

(Q1 Un-audited): EPS was Tk. 0.12 for July-September 2022 as against Tk. 0.26 for July-September 2021; NOCFPS was Tk. (0.20) for July-September 2022 as against Tk. 0.73 for July-September 2021. NAV per share was Tk. 22.19 as on September 30, 2022 and Tk. 22.07 as on June 30, 2022.

LEGACYFOOT

(Q1 Un-audited): EPS was Tk. (0.62) for July-September 2022 as against Tk. 0.05 for July-September 2021; NOCFPS was Tk. (0.06) for July-September 2022 as against Tk. (0.41) for July-September 2021. NAV per share was Tk. 9.21 as on September 30, 2022 and Tk. 9.83 as on June 30, 2022.

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