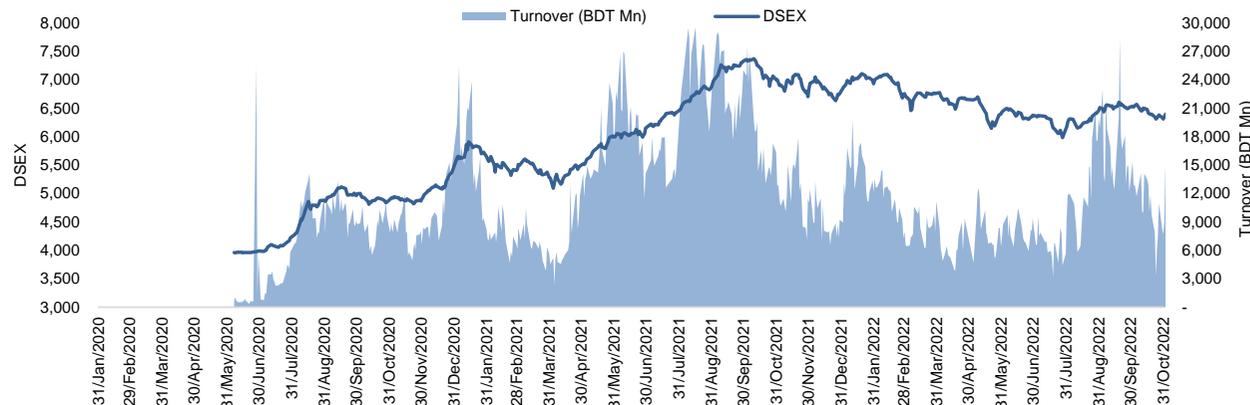


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.39%) lost 24.26 points and closed at 6,190.99. The blue-chip index DS30 (-0.14%), the Shariah-based index DSES (-0.43%), and the large-cap index CDSET (-0.08%) closed at 2,177.41, 1,343.00, and 1,204.69 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.33% followed by Fuel & Power (-0.19%), NBF1 (-0.04%), Bank (-0.02%), Engineering (-0.02%), Telecommunication (0.00%), and Food & Allied (+0.01%), respectively. Block trades contributed 1.9% of the overall market turnover. Genex Infosys Limited (-11.7%) was the most traded share with a turnover of BDT 479 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,190.99	6,215.24	-24.26	-0.39%	-8.4%
DS30	2,177.41	2,180.40	-2.99	-0.14%	-14.0%
DSES	1,343.00	1,348.86	-5.87	-0.43%	-6.2%
CDSET	1,204.69	1,205.61	-0.92	-0.08%	-11.4%

	Advanced	Declined	Unchanged	Total
All Category	13	69	223	305
A Category (Equity)	9	54	149	212
B Category (Equity)	0	12	62	74
N Category (Equity)	2	3	3	8
Z Category (Equity)	2	0	9	11
Mutual Funds	0	0	12	12
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,633,492	7,642,081	-0.1%
	Mn USD	71,408	71,488	
Turnover	Mn BDT	3,519	4,229	-16.8%
	Mn USD	33	40	
Volume	Mn Shares	56	69	-17.6%
	No. of Trade	84,583	103,569	-18.3%

* Average Interbank Exchange Rate is BDT 106.90 as of Nov 20, 2022

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Figure: Sectorial Turnover (BDT)

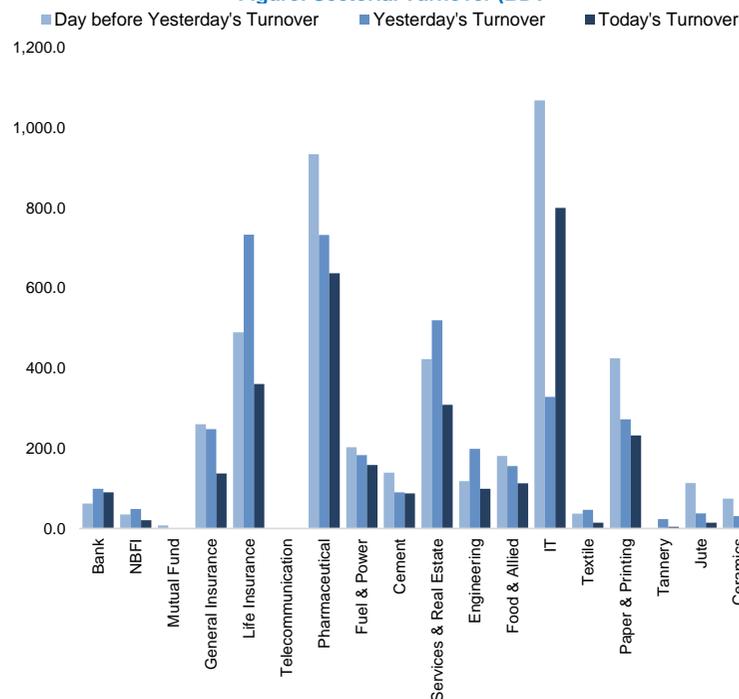
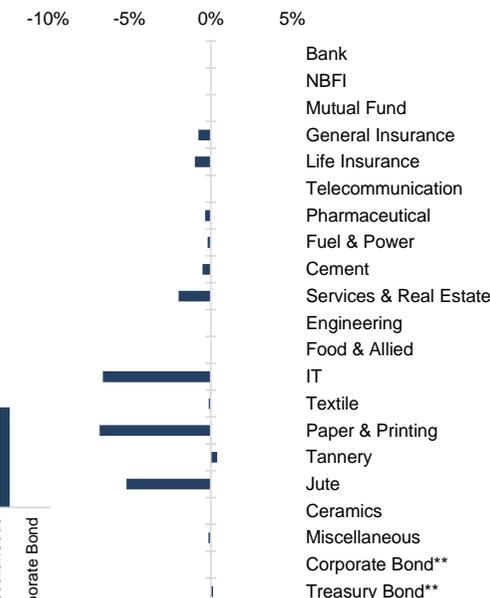


Figure: Sectorial Mcap Change



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	-0.28	-0.02%	34	666,340	8.7%	90.2	2.7%	7.7x	0.7x	GP	386,996	8.7%	0.3	11.2x	9.1x
NBFI	1,922	1,923	-0.83	-0.04%	23	187,545	2.5%	21.0	0.6%	NM	4.3x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	0.4	0.0%	NM	0.8x	BATBC	280,098	6.3%	0.0	16.8x	6.7x
General Insurance	3,189	3,213	-24.57	-0.76%	41	92,476	1.2%	137.3	4.1%	15.6x	1.5x	SQURPHARMA	185,977	4.2%	143.7	10.0x	1.7x
Life Insurance	2,518	2,543	-24.77	-0.97%	14	70,627	0.9%	360.2	10.8%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.6	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,726	3,739	-12.50	-0.33%	33	713,904	9.4%	637.1	19.1%	18.4x	2.4x	UPGDCL	135,475	3.0%	13.1	13.6x	3.8x
Fuel & Power	1,696	1,699	-3.21	-0.19%	23	447,093	5.9%	158.8	4.8%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.0	8.2x	1.2x
Cement	2,328	2,340	-12.09	-0.52%	7	111,810	1.5%	87.5	2.6%	33.1x	2.5x	BERGERPBL	79,380	1.8%	0.0	25.8x	6.9x
Services & Real Estate	1,752	1,787	-35.38	-1.98%	8	69,201	0.9%	308.6	9.3%	39.2x	0.9x	MARICO	76,277	1.7%	0.3	21.3x	44.9x
Engineering	4,489	4,490	-0.77	-0.02%	42	526,984	6.9%	99.0	3.0%	27.6x	1.8x	ICB	74,135	1.7%	0.0	68.1x	1.6x
Food & Allied	21,158	21,155	+2.71	+0.01%	21	376,997	4.9%	112.7	3.4%	21.4x	7.4x	BXPBARMA	65,489	1.5%	0.0	12.8x	1.6x
IT	3,063	3,281	-217.47	-6.63%	11	39,939	0.5%	800.0	24.0%	28.5x	2.7x	BEACONPHAR	57,796	1.3%	9.9	71.1x	9.4x
Textile	1,634	1,636	-2.04	-0.12%	58	171,839	2.3%	14.8	0.4%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	11,123	11,939	-816.07	-6.84%	6	42,856	0.6%	232.2	7.0%	48.2x	2.2x	ISLAMIBANK	53,130	1.2%	5.1	10.8x	0.8x
Tannery	3,027	3,015	+11.69	+0.39%	6	32,592	0.4%	4.3	0.1%	39.5x	3.0x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	10,940	11,538	-597.48	-5.18%	3	2,676	0.0%	14.4	0.4%	NM	94.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	692	692	-	-	5	32,003	0.4%	0.0	0.0%	33.4x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,066	4,072	-5.91	-0.15%	15	228,092	3.0%	250.1	7.5%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.1	10.0x	0.9x
Corporate Bond**	90	90	-	-	9	36,970	0.5%	0.3	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	99	99	+0.14	+0.14%	250	3,149,383	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
CLICL	49.3	+9.8%	2.9	NM	NM	SQURPHARMA	121,685	7.3%	10.0x	1.7x	GENEXIL	96.5	-11.7%	479.1	27.9x	5.3x
BDWELDING	29.7	+6.1%	24.9	NM	2.6x	BATBC	74,086	4.4%	16.8x	6.7x	ORIONPHARM	84.1	-1.1%	240.8	20.8x	0.9x
SONALILIFE	60.9	+3.7%	33.7	NM	NM	BEXIMCO	70,355	4.2%	8.2x	1.2x	NAVANAPHAR	85.4	-6.1%	193.0	22.8x	1.8x
JHRML	73.7	+1.9%	68.5	22.1x	2.3x	RENATA	68,196	4.1%	28.1x	4.6x	EHL	77.6	-7.6%	152.5	12.6x	1.0x
SANDHANINS	28.1	+1.8%	7.2	NM	NM	BXPBARMA	45,725	2.7%	12.8x	1.6x	BPML	88.6	-8.6%	148.8	23.8x	1.2x
JUTESPINN	187.7	+1.7%	2.0	NM	NM	BEACONPHAR	40,457	2.4%	71.1x	9.4x	SQURPHARMA	209.8	-0.0%	143.7	10.0x	1.7x
OLYMPIC	120.1	+1.4%	26.0	19.1x	2x	GP	38,700	2.3%	11.2x	9.1x	BSC	112.1	-2.2%	107.8	7.8x	1.5x
PROGRESLIF	86.1	+1.1%	27.3	NM	NM	BRACBANK	30,976	1.8%	10.9x	1.0x	AAMRANET	46.1	-7.6%	106.9	20.1x	1.3x
BATASHOE	940.6	+1.0%	1.3	36.3x	3.5x	LHBL	26,704	1.6%	18.4x	4.1x	PADMALIFE	56.7	-6.1%	100.6	NM	NM
PREMIERBAN	13.0	+0.8%	14.5	3.9x	0.6x	ISLAMIBANK	23,866	1.4%	10.8x	0.8x	SAPORTL	32.4	-5.5%	90.5	22.7x	0.9x

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)
GENEXIL	96.5	-11.7%	479.1	27.9x	5.3x	PUBALIBANK	18,314	1.1%	5.4x	0.6x	RENATA	1,218.0	1,141.8	5.0	52	62.62
INTRACO	38.0	-8.9%	58.2	30.8x	3x	CITYBANK	17,615	1.1%	4.5x	0.8x	BEACHHATCH	42.0	41.6	5.0	599	24.98
MONOSPOOL	257.8	-8.7%	48.0	38.5x	5.6x	ROBI	15,714	0.9%	NM	2.4x	SQURPHARMA	209.8	209.8	1.0	90	18.88
BPML	88.6	-8.6%	148.8	23.8x	1.2x	ALARABANK	14,609	0.9%	14.6x	1.1x	GENEXIL	104.5	96.5	3.0	152	15.63
PAPERPROC	178.0	-8.0%	27.4	37.8x	5.5x	OLYMPIC	14,566	0.9%	19.1x	2.4x	SUMITPOWER	34.3	34.3	1.0	200	6.86
AAMRATECH	39.3	-7.7%	45.7	23.7x	1.6x	BSRMLTD	14,417	0.9%	8.7x	0.7x	ORIONINFU	850.0	820.0	2.0	7	5.88
AAMRANET	46.1	-7.6%	106.9	20.1x	1.3x	UPGDCL	13,547	0.8%	13.6x	3.8x	GP	279.9	271.0	4.0	21	5.83
EHL	77.6	-7.6%	152.5	12.6x	1.0x	ORIONPHARM	13,386	0.8%	20.8x	0.9x	INTRACO	45.8	37.6	3.0	126	5.63
SONALIANS	689.9	-7.5%	12.4	NM	3.0x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	BANKASIA	19.0	19.0	1.0	279	5.30
ADNTEL	100.9	-7.3%	42.2	34.0x	3.5x						NAHEEACP	65.1	65.1	2.0	69	4.50

* 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	62.6	52	5
BEACHHATCH	42.0	41.6	25.0	599	5
SQURPHARMA	209.8	209.8	18.9	90	1
GENEXIL	104.5	96.5	15.6	152	3
SUMITPOWER	34.3	34.3	6.9	200	1
ORIONINFU	850.0	820.0	5.9	7	2
GP	279.9	271.0	5.8	21	4
INTRACO	45.8	37.6	5.6	126	3
BANKASIA	19.0	19.0	5.3	279	1
NAHEEACP	65.1	65.1	4.5	69	2
ORIONPHARM	92.0	82.0	3.5	41	4
IFIC	10.8	10.5	3.3	310	4
AAMRATECH	46.8	45.3	2.6	55	3
BSRMLTD	81.0	81.0	2.4	30	2
MHSML	26.2	26.2	2.3	86	1
DBH	57.1	57.1	2.2	39	1
GSPFINANCE	30.0	30.0	1.5	49	2
BRACBANK	34.8	34.8	1.2	35	2
ADNTEL	118.0	118.0	1.2	10	1
AAMRANET	53.5	53.5	1.0	19	1
BERGERPBL	1,605.0	1,605.0	1.0	1	1
BDWELDING	25.2	25.2	0.9	35	1
Total			189.4		68

Important DSE News
BEACHHATCH

(Q1 Un-audited): EPS was Tk. 0.31 for July-September 2022 as against Tk. (0.05) for July-September 2021; NOCFPS was Tk. (0.0170) for July-September 2022 as against Tk. (0.0264) for July-September 2021. NAV per share was Tk. 10.03 as on September 30, 2022 and Tk. 9.73 as on June 30, 2022.

JAMUNABANK

The company has informed that Bangladesh Bank, considering earlier decision of the Board of Jamuna Bank Limited regarding in principle agreed to establish Exchange House in Spain, has approved to establish 100% owned exchange house in the name of "Jamuna Money Transfer S.L., Spain" with paid-up capital of EURO 125,000.00 subject to complying conditions mentioned at Section 26 & 32 of Bank Companies Act 1991 (amended upto 2018) and obtaining necessary approval from the Central Bank/Regulatory Authority(ies)/Regulatory Body(ies) of Spain. The main objective of establishing the said exchange house is to inflow foreign remittance into the Country through banking channel.

ARGONDENIM

Abu Kawser Majumder, one of the Directors of the company, has expressed his intention to transfer 4,00,000 shares out of his holdings 94,51,024 shares of the company to his son Farhan Majumder (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Zeal Bangla Sugar Mills Ltd.	-	0.0%	0.0%	Record Date	22-Nov-22
Shyampur Sugar Mills Ltd.	-	0.0%	0.0%	Record Date	22-Nov-22
Renwick Jajneswar & Co (Bd) Ltd.	-	0.0%	0.0%	Record Date	22-Nov-22
Baraka Patenga Power Limited	-	0.0%	10.0%	Record Date	22-Nov-22
Baraka Power Limited	-	0.0%	10.0%	Record Date	22-Nov-22
H.R.Textile Ltd.	-	10.0%	5.0%	Record Date	22-Nov-22
United Power Generation & Distribution Company Ltd.	-	0.0%	170.0%	Record Date	22-Nov-22
Bashundhara Paper Mills Limited	-	0.0%	10.0%	Record Date	22-Nov-22
Desh Garmants Ltd.	-	10.0%	0.0%	Record Date	22-Nov-22
Legacy Footwear Ltd.	-	0.0%	0.0%	Record Date	22-Nov-22
BSRM Steels Limited	-	0.0%	30.0%	Record Date	23-Nov-22
Bangladesh Steel Re-Rolling Mills Limited	-	0.0%	35.0%	Record Date	23-Nov-22
ACME Pesticides Limited	-	0.0%	5.0%	Record Date	23-Nov-22
Khulna Power Company Limited	-	0.0%	10.0%	Record Date	23-Nov-22
GPH Ispat Ltd.	-	5.5%	5.5%	Record Date	23-Nov-22
Metro Spinning Ltd.	-	5.0%	3.0%	Record Date	23-Nov-22
Bangladesh Shipping Corporation	-	0.0%	20.0%	Record Date	23-Nov-22

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