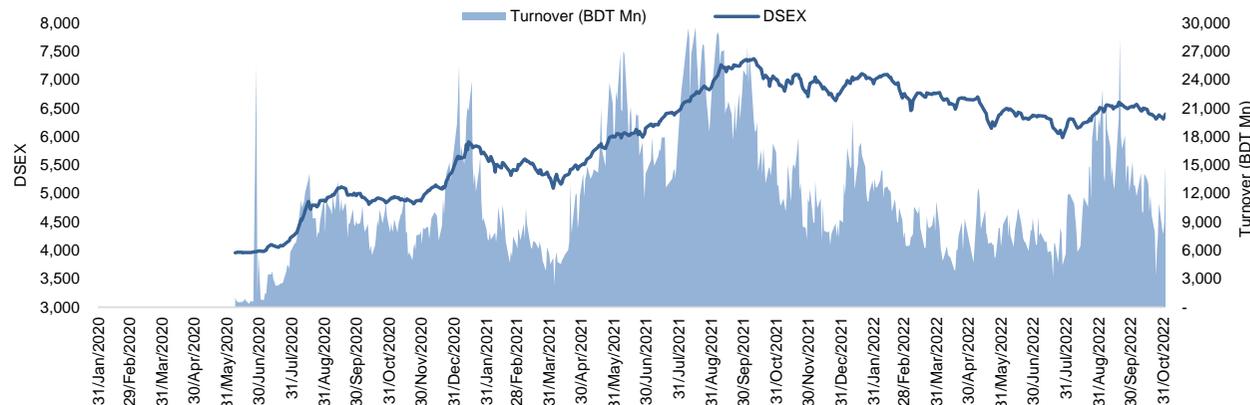


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.64%) gained 39.52 points and closed at 6,230.51. The blue-chip index DS30 (+0.59%), the Shariah-based index DSES (+0.93%), and the large-cap index CDSET (+0.41%) closed at 2,190.21, 1,355.50, and 1,209.62 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.94% followed by Food & Allied (+0.37%), Engineering (+0.16%), Fuel & Power (+0.11%), Bank (+0.06%), NBF (0.03%), and Telecommunication (0.00%), respectively. Block trades contributed 4.0% of the overall market turnover. Genex Infosys Limited (+5.8%) was the most traded share with a turnover of BDT 381 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,230.51	6,190.99	+39.52	+0.64%	-7.8%
DS30	2,190.21	2,177.41	+12.79	+0.59%	-13.5%
DSES	1,355.50	1,343.00	+12.51	+0.93%	-5.3%
CDSET	1,209.62	1,204.69	+4.93	+0.41%	-11.0%

	Advanced	Declined	Unchanged	Total
All Category	78	8	229	315
A Category (Equity)	58	5	157	220
B Category (Equity)	13	3	59	75
N Category (Equity)	5	0	4	9
Z Category (Equity)	2	0	9	11
Mutual Funds	0	0	15	15
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,646,030	7,633,492	
	Mn USD	72,712	72,593	+0.2%
Turnover	Mn BDT	4,287	3,519	+21.8%
	Mn USD	41	33	
Volume	Mn Shares	65	56	+15.1%
	No. of Trade	98,832	84,583	+16.8%

\* Average Interbank Exchange Rate is BDT 105.16 as of Nov 21, 2022

<b>Fahim Hassan</b> Research Associate (880) 1709636546 fahim.hassan@bracepl.com	<b>Md. Tanvir Ahmed</b> Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
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Figure: Sectorial Turnover (BDT)

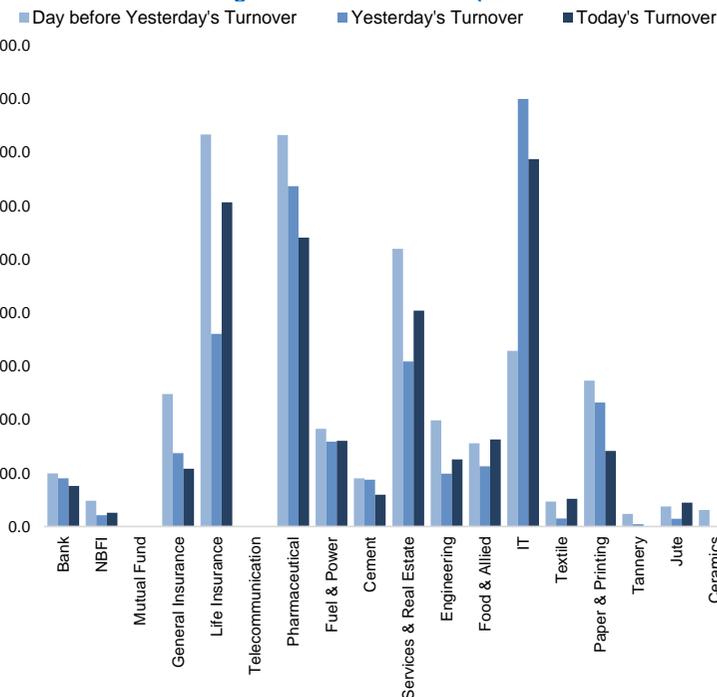
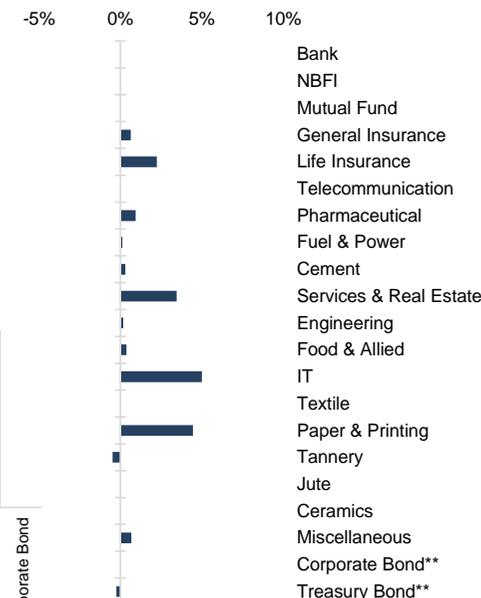


Figure: Sectorial Mcap Change



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	1,426	+0.87	+0.06%	34	666,746	8.7%	76.0	2.1%	7.7x	0.7x	GP	386,996	8.6%	0.5	11.2x	9.1x
NBFI	1,923	1,922	+0.59	+0.03%	23	187,603	2.5%	25.7	0.7%	NM	4.3x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-0.00	-0.00%	37	38,610	0.5%	0.3	0.0%	NM	0.8x	BATBC	280,098	6.2%	1.5	16.8x	6.7x
General Insurance	3,209	3,189	+20.18	+0.63%	41	93,061	1.2%	108.3	3.0%	15.7x	1.5x	SQURPHARMA	186,332	4.2%	63.3	10.0x	1.7x
Life Insurance	2,575	2,518	+56.44	+2.24%	14	72,210	0.9%	606.5	17.1%	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%	0.1	28.1x	4.6x
Pharmaceutical	3,761	3,726	+34.89	+0.94%	33	720,589	9.4%	540.4	15.2%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,698	1,696	+1.92	+0.11%	23	447,598	5.9%	160.6	4.5%	14.4x	1.1x	BEXIMCO	101,302	2.3%	26.7	8.2x	1.2x
Cement	2,335	2,328	+7.25	+0.31%	7	112,159	1.5%	59.6	1.7%	33.2x	2.5x	BERGERPBL	79,380	1.8%	0.1	25.8x	6.9x
Services & Real Estate	1,812	1,752	+60.51	+3.45%	8	71,592	0.9%	404.0	11.4%	40.5x	0.9x	MARICO	76,277	1.7%	0.4	21.3x	44.9x
Engineering	4,497	4,489	+7.32	+0.16%	42	527,843	6.9%	125.7	3.5%	27.6x	1.8x	ICB	74,135	1.7%	0.1	68.1x	1.6x
Food & Allied	21,236	21,158	+78.00	+0.37%	21	378,386	5.0%	162.8	4.6%	21.5x	7.4x	BXPBARMA	65,891	1.5%	21.8	12.9x	1.6x
IT	3,217	3,063	+153.66	+5.02%	11	41,942	0.5%	687.3	19.3%	29.9x	2.9x	BEACONPHAR	60,845	1.4%	16.0	74.8x	9.9x
Textile	1,634	1,634	+0.50	+0.03%	58	171,892	2.3%	52.0	1.5%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.2	10.9x	1.0x
Paper & Printing	11,619	11,123	+495.62	+4.46%	6	44,765	0.6%	141.4	4.0%	50.4x	2.3x	ISLAMIBANK	53,130	1.2%	3.9	10.8x	0.8x
Tannery	3,012	3,027	-14.74	-0.49%	6	32,433	0.4%	0.7	0.0%	39.3x	3.0x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	10,945	10,940	+4.18	+0.04%	3	2,677	0.0%	44.6	1.3%	NM	94.5x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	692	692	+0.24	+0.04%	5	32,014	0.4%	26.5	0.7%	33.4x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,093	4,066	+27.30	+0.67%	15	229,623	3.0%	332.4	9.3%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	90	90	-	-	9	36,970	0.5%	0.7	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	99	99	-0.24	-0.24%	250	3,141,847	41.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CLICL	54.2	+9.9%	9.3	NM	NM
BDCOM	36.7	+9.9%	93.7	25.4x	2.3x
INTRACO	41.7	+9.7%	96.3	33.8x	3.3x
EHL	85.0	+9.5%	114.2	13.8x	1.1x
PADMALIFE	62.1	+9.5%	192.0	NM	NM
NAVANAPHAR	93.3	+9.3%	149.3	24.9x	2.0x
BDTHAIFOOD	46.6	+8.9%	24.6	NM	3x
JUTESPINN	202.5	+7.9%	8.0	NM	NM
APEXFOODS	239.2	+7.7%	16.8	37.0x	1.8x
ORIONPHARM	90.6	+7.7%	198.2	22.4x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AL-HAJTEX	132.3	-2.2%	24.9	NM	13.7x
SONALIANS	681.0	-1.3%	36.6	NM	3x
BATASHOE	929.0	-1.2%	0.6	35.9x	3.4x
ORIONINFU	761.6	-1.1%	47.4	NM	51.5x
PREMIERBAN	12.9	-0.8%	30.3	3.9x	0.6x
MPETROLEUM	200.1	-0.5%	6.9	6.4x	1.1x
1STPRIMFMF	17.0	-0.0%	0.0	NM	1.6x
ABBANK	9.9	-0.0%	0.0	10.6x	0.3x
ABB1STMF	5.2	-0.0%	0.0	NM	0.6x
1JANATAMF	6.1	-0.0%	0.0	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,917	7.2%	10.0x	1.7x
BATBC	74,086	4.4%	16.8x	6.7x
BEXIMCO	70,355	4.2%	8.2x	1.2x
RENATA	68,196	4.0%	28.1x	4.6x
BXPBARMA	46,005	2.7%	12.9x	1.6x
BEACONPHAR	42,592	2.5%	74.8x	9.9x
GP	38,700	2.3%	11.2x	9.1x
BRACBANK	30,976	1.8%	10.9x	1.0x
LHBL	26,827	1.6%	18.5x	4.1x
ISLAMIBANK	23,866	1.4%	10.8x	0.8x
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
ROBI	15,714	0.9%	NM	2.4x
OLYMPIC	15,027	0.9%	19.7x	2.5x
ALARABANK	14,609	0.9%	14.6x	1.1x
ORIONPHARM	14,421	0.9%	22.4x	1.0x
BSRMLTD	14,417	0.9%	8.7x	0.7x
UPGDCL	13,547	0.8%	13.6x	3.8x
SUMITPOWER	13,358	0.8%	10.0x	0.9x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GENEXIL	102.1	+5.8%	381.3	29.5x	5.6x
ORIONPHARM	90.6	+7.7%	198.2	22.4x	1.0x
PADMALIFE	62.1	+9.5%	192.0	NM	NM
BSC	117.2	+4.5%	163.3	8.1x	1.5x
NAVANAPHAR	93.3	+9.3%	149.3	24.9x	2.0x
SEAPEARL	184.4	+4.7%	118.1	68.3x	14.2x
EHL	85.0	+9.5%	114.2	13.8x	1.1x
SAPORTL	34.6	+6.8%	110.3	24.2x	1.0x
PRAGATILIF	111.6	+5.2%	98.7	NM	NM
INTRACO	41.7	+9.7%	96.3	33.8x	3.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RENATA	1,218.0	1,141.8	10.0	138	168.06
BXPBARMA	145.0	145.0	1.0	1,000	145.00
ALARABANK	24.0	24.0	4.0	4,767	114.41
BEXIMCO	115.6	104.1	51.0	517	55.48
SEAPEARL	179.0	170.0	11.0	309	53.27
ORIONPHARM	81.4	80.2	7.0	597	48.28
ORIONINFU	825.0	712.4	2.0	40	29.34
INTRACO	41.5	37.0	13.0	705	27.30
SONALIPAPR	698.0	615.5	8.0	40	25.59
BATBC	503.0	479.8	12.0	35	16.93

\* 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	168.1	138	10
BXPHARMA	145.0	145.0	145.0	1,000	1
ALARABANK	24.0	24.0	114.4	4,767	4
BEXIMCO	115.6	104.1	55.5	517	51
SEAPEARL	179.0	170.0	53.3	309	11
ORIONPHARM	81.4	80.2	48.3	597	7
ORIONINFU	825.0	712.4	29.3	40	2
INTRACO	41.5	37.0	27.3	705	13
SONALIPAPR	698.0	615.5	25.6	40	8
BATBC	503.0	479.8	16.9	35	12
GPHISPAT	42.6	42.6	6.6	155	7
EGEN	60.3	59.7	5.4	90	2
PADMALIFE	60.0	55.0	5.4	92	3
METROSPIN	40.5	40.5	2.6	64	1
GP	269.0	268.0	2.1	8	2
BSCCL	200.0	199.8	2.1	10	4
SQUARETEXT	67.5	67.5	1.7	25	1
BRACBANK	34.8	34.7	1.6	46	2
SEMILLECMF	9.1	9.1	1.2	134	1
IFIC	11.0	11.0	1.1	100	2
BBS	21.3	19.5	1.1	52	2
ACI	240.1	240.0	1.0	4	2
<b>Total</b>			<b>730.6</b>		<b>172</b>

**Important DSE News**
**DOMINAGE**

The Board of Directors has recommended 2% Cash dividend for general shareholders other than Sponsors/Directors for the year ended June 30, 2022. The Sponsors/Directors hold 3,09,80,609 shares out of total 10,26,00,000 shares of the Company and the cash dividend to be payable to the general shareholders is Tk. 1,43,23,878.20. Date of AGM: 28.12.2022, Time: 11:00 AM, Venue: Digital Platform. Record Date: 11.12.2022. The Company has also reported EPS of Tk. 0.55, NAV per share of Tk. 17.23 and NOCFPS of Tk. 2.61 for the year ended June 30, 2022 as against Tk. 1.17, Tk. 17.04 and Tk. 2.77 respectively for the same period of the previous year.

**(Q1 Un-audited):** EPS was Tk. 0.03 for July-September 2022 as against Tk. 0.15 for July-September 2021; NOCFPS was Tk. 0.53 for July-September 2022 as against Tk. 0.82 for July-September 2021. NAV per share was Tk. 17.26 as on September 30, 2022 and Tk. 17.23 as on June 30, 2022.

**RAHIMAFood**

The Board of Directors has recommended 5% Cash dividend for shareholders other than Directors and Associated Company for the year ended June 30, 2022. Directors and Associated Company hold 90,46,300 shares and Tk. 54,76,950.00 will be paid as Cash Dividend. Date of AGM: 29.12.2022, Time: 3:30 PM, Venue: Digital Platform through the link- <https://rahimafood.bdvirtualagm.com>. Record Date: 13.12.2022. The Company has also reported EPS of Tk. 0.29, NAV per share of Tk. 9.53 and NOCFPS of Tk. 0.02 for the year ended June 30, 2022 as against Tk. 0.07, Tk. 9.29 and Tk. (0.40) respectively for the same period of the previous year.

**AMBEEPHA**

The Board of Directors has recommended 10% Cash and 20% Stock dividend for the year ended June 30, 2022. DSE has sent a query letter to the company as they have not complied Conditions 2 and 3(a) of BSEC Notification No.- BSEC/CMRRCD/2009-193/46/Admin/138 dated October 03, 2022 regarding declaration of stock dividend. Date of AGM: 31.12.2022, Time: 11:00 AM, Venue: Digital Platform. Record date: will be notified later on. The Company has also reported EPS of Tk. 3.36, NAV per share of Tk. 21.96 and NOCFPS of Tk. (30.49) for the year ended June 30, 2022 as against Tk. (5.42), Tk. 18.68 and Tk. (2.27) respectively for the same period of the previous year.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Bd.Thai Aluminium Ltd.	-	0.0%	0.0%	Record Date	23-Nov-22
Runner Automobiles Limited	-	0.0%	10.0%	Record Date	24-Nov-22
SK Trims & Industries Limited	-	0.0%	4.0%	Record Date	24-Nov-22
Mir Akhter Hossain Limited	-	0.0%	12.5%	Record Date	24-Nov-22
Olympic Accessories Limited	-	0.0%	0.0%	Record Date	24-Nov-22
Safko Spinnings Mills Ltd.	-	1.0%	2.0%	Record Date	24-Nov-22
National Feed Mill Limited	-	0.0%	1.0%	Record Date	24-Nov-22
CVO Petrochemical Refinery Limited	-	0.0%	0.0%	Record Date	24-Nov-22
Khulna Printing & Packaging Limited	-	0.0%	0.0%	Record Date	24-Nov-22
Stylecraft Limited	-	0.0%	2.0%	Record Date	24-Nov-22

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