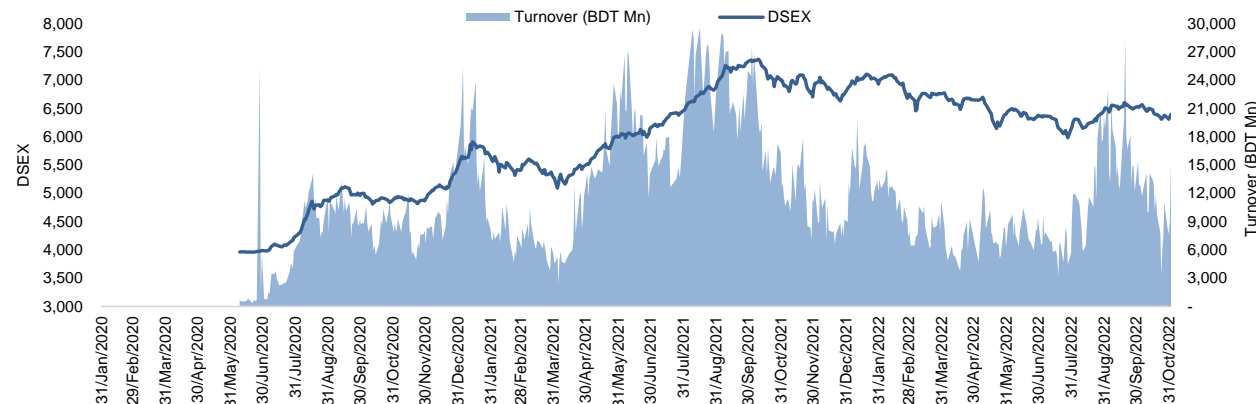


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.37%) lost 22.78 points and closed at 6,207.73. The blue-chip index DS30 (-0.32%), the Shariah-based index DSES (-0.44%), and the large-cap index CDSET (-0.18%) closed at 2,183.19, 1,349.56, and 1,207.47 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.56% followed by Food & Allied (-0.23%), Engineering (-0.15%), NBF (0.07%), Fuel & Power (-0.02%), Telecommunication (0.00%), and Bank (+0.02%), respectively. Block trades contributed 2.7% of the overall market turnover. Bashundhara Paper Mills Limited (-0.8%) was the most traded share with a turnover of BDT 631 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,207.73	6,230.51	-22.78	-0.37%	-8.1%
DS30	2,183.19	2,190.21	-7.02	-0.32%	-13.8%
DSES	1,349.56	1,355.50	-5.95	-0.44%	-5.7%
CDSET	1,207.47	1,209.62	-2.15	-0.18%	-11.2%

	Advanced	Declined	Unchanged	Total
All Category	20	63	232	315
A Category (Equity)	15	48	158	221
B Category (Equity)	3	10	62	75
N Category (Equity)	2	3	3	8
Z Category (Equity)	0	2	9	11
Mutual Funds	0	1	20	21
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,638,049	7,646,030	-0.1%
	Mn USD	72,091	72,166	
Turnover	Mn BDT	5,407	4,287	+26.1%
	Mn USD	51	40	
Volume	Mn Shares	76	65	+17.6%
	No. of Trade	111,133	98,832	+12.4%

* Average Interbank Exchange Rate is BDT 105.95 as of Nov 22, 2022

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Figure: Sectorial Turnover (BDT)

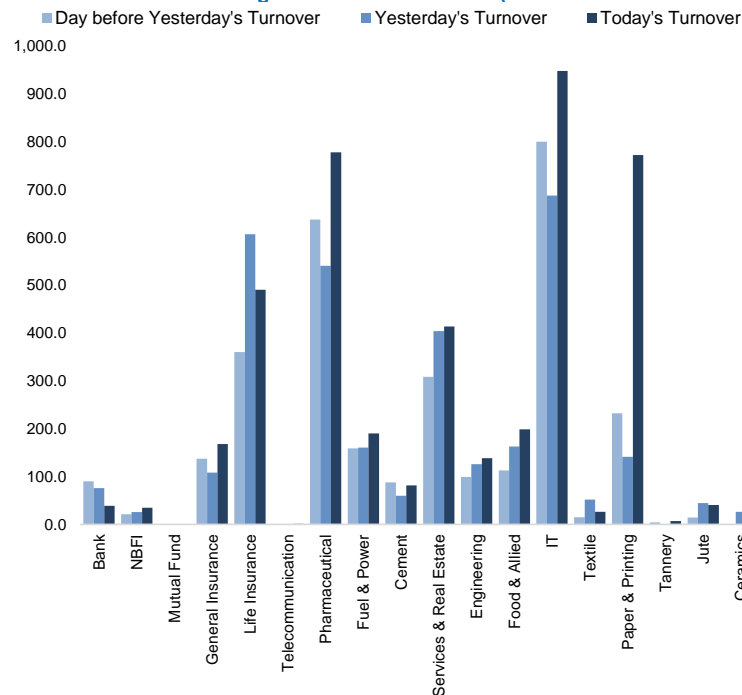
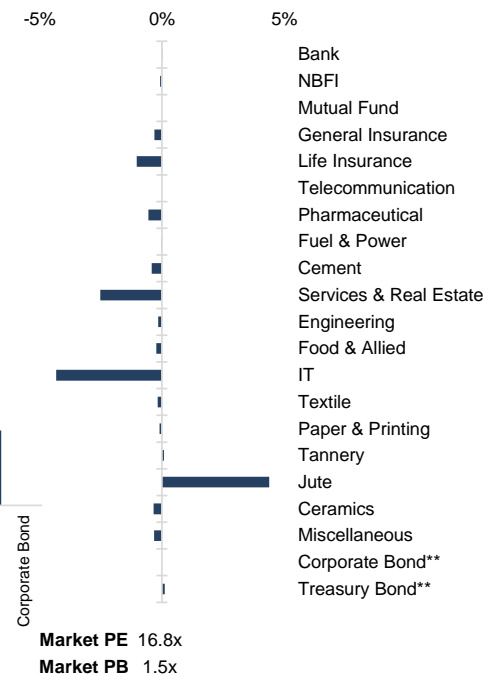


Figure: Sectorial Mcap Change



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	1,428	1,427	+0.23	+0.02%	34	666,854	8.7%	38.7	0.9%	7.7x	0.7x	GP	386,996	8.7%	1.3	11.2x	9.1x
NBFI	1,922	1,923	-1.44	-0.07%	23	187,462	2.5%	34.8	0.8%	NM	4.3x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	0.9	0.0%	NM	0.8x	BATBC	280,098	6.3%	0.3	16.8x	6.7x
General Insurance	3,199	3,209	-9.93	-0.31%	41	92,773	1.2%	168.2	3.7%	15.7x	1.5x	SQURPHARMA	187,041	4.2%	101.9	10.0x	1.7x
Life Insurance	2,548	2,575	-26.62	-1.03%	14	71,464	0.9%	490.5	10.9%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	1.5	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.1	28.1x	4.6x
Pharmaceutical	3,740	3,761	-20.92	-0.56%	33	716,580	9.4%	777.6	17.2%	18.4x	2.4x	UPGDCL	135,475	3.0%	0.1	13.6x	3.8x
Fuel & Power	1,697	1,698	-0.36	-0.02%	23	447,503	5.9%	190.2	4.2%	14.4x	1.1x	BEXIMCO	101,302	2.3%	5.8	8.2x	1.2x
Cement	2,326	2,335	-9.67	-0.41%	7	111,694	1.5%	81.5	1.8%	33.1x	2.5x	BERGERPBL	79,380	1.8%	1.7	25.8x	6.9x
Services & Real Estate	1,766	1,812	-45.62	-2.52%	8	69,789	0.9%	413.6	9.2%	39.5x	0.9x	MARICO	76,277	1.7%	0.0	21.3x	44.9x
Engineering	4,490	4,497	-6.66	-0.15%	42	527,061	6.9%	138.2	3.1%	27.6x	1.8x	ICB	74,135	1.7%	0.1	68.1x	1.6x
Food & Allied	21,187	21,236	-48.92	-0.23%	21	377,515	5.0%	198.6	4.4%	21.4x	7.4x	BXPBARMA	65,222	1.5%	14.9	12.8x	1.6x
IT	3,078	3,217	-138.93	-4.32%	11	40,131	0.5%	947.7	21.0%	28.6x	2.7x	BEACONPHAR	59,714	1.3%	13.3	73.4x	9.7x
Textile	1,631	1,634	-2.87	-0.18%	58	171,591	2.3%	26.1	0.6%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	11,608	11,619	-10.73	-0.09%	6	44,724	0.6%	771.6	17.1%	50.3x	2.3x	ISLAMIBANK	53,130	1.2%	1.7	10.8x	0.8x
Tannery	3,015	3,012	+2.54	+0.08%	6	32,460	0.4%	6.9	0.2%	39.3x	3.0x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	11,425	10,945	+480.36	+4.39%	3	2,795	0.0%	40.7	0.9%	NM	98.6x	TITASGAS	40,459	0.9%	0.1	14.2x	0.5x
Ceramics	690	692	-2.37	-0.34%	5	31,905	0.4%	30.0	0.7%	33.3x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,080	4,093	-13.21	-0.32%	15	228,882	3.0%	156.4	3.5%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	90	90	-	-	9	36,970	0.5%	0.3	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	99	99	+0.12	+0.12%	250	3,145,551	41.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CLICL	59.6	+10.0%	10.5	NM	NM
ADVENT	24.8	+9.7%	106.4	23.2x	1.7x
SONALIANS	731.1	+7.4%	39.3	NM	3.2x
BGIC	55.1	+6.0%	20.8	34.4x	2.8x
MONNOAGML	588.9	+4.0%	29.1	NM	3.4x
PRAGATILIF	115.1	+3.1%	75.2	NM	NM
SONALIPAPR	710.3	+1.6%	49.4	76.0x	4x
KAY&QUE	245.5	+1.1%	1.5	NM	3.3x
POPULARLIF	70.1	+0.9%	21.2	NM	NM
ISNLTD	54.6	+0.7%	12.3	91.0x	16.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	122,381	7.3%	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	4.1%	28.1x	4.6x
BXPBARMA	45,538	2.7%	12.8x	1.6x
BEACONPHAR	41,799	2.5%	73.4x	9.7x
GP	38,700	2.3%	11.2x	9.1x
BRACBANK	30,976	1.8%	10.9x	1.0x
LHBL	26,663	1.6%	18.4x	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
ALARABANK	14,609	0.9%	14.6x	1.1x
OLYMPIC	14,602	0.9%	19.1x	2.4x
BSRMLTD	14,417	0.9%	8.7x	0.7x
ORIONPHARM	13,704	0.8%	21.3x	0.9x
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
BPML	87.9	-0.8%	630.7	23.6x	1.2x
GENEXIL	98.1	-3.9%	558.5	28.4x	5.4x
ORIONPHARM	86.1	-5.0%	241.5	21.3x	0.9x
NAVANAPHAR	87.1	-6.6%	220.3	23.2x	1.9x
PADMALIFE	58.5	-5.8%	179.6	NM	NM
EHL	79.8	-6.1%	166.2	12.9x	1.1x
INTRACO	41.9	+0.5%	122.4	33.9x	3.3x
ADVENT	24.8	+9.7%	106.4	23.2x	1.7x
SEAPEARL	179.8	-2.5%	102.6	66.6x	13.8x
SQURPHARMA	211.0	+0.4%	101.9	10.0x	1.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HRTEX	115.9	-9.1%	0.1	36.3x	2.5x
ADNTEL	98.0	-8.2%	36.4	33.0x	3x
MONOSPOOL	255.5	-7.3%	52.3	38.1x	5.5x
GEMINISEA	361.8	-6.8%	39.8	26.4x	19.7x
SINOBANGLA	65.8	-6.7%	54.7	35.6x	2.3x
NAVANAPHAR	87.1	-6.6%	220.3	23.2x	1.9x
EGEN	59.3	-6.2%	22.2	41.2x	2.7x
EHL	79.8	-6.1%	166.2	12.9x	1.1x
ORIONINFU	716.1	-6.0%	53.8	NM	48.4x
JHRML	74.1	-5.8%	76.3	22.3x	2.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
IPDC	59.0	59.0	1.0	6,000	354.00
RENATA	1,218.0	1,141.8	10.0	129	156.18
FORTUNE	79.5	79.5	2.0	1,422	113.04
ORIONINFU	749.0	722.0	7.0	133	98.89
BEXIMCO	105.6	104.1	32.0	267	27.86
BRACBANK	38.5	34.7	16.0	664	23.15
SQURPHARMA	210.2	195.0	2.0	109	22.68
INTRACO	43.5	37.6	4.0	500	20.83
BDTHAIFOOD	45.2	45.2	1.0	200	9.04
BSCCL	200.0	199.8	9.0	38	7.62

* 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
IPDC	59.0	59.0	354.0	6,000	1
RENATA	1,218.0	1,141.8	156.2	129	10
FORTUNE	79.5	79.5	113.0	1,422	2
ORIONINFU	749.0	722.0	98.9	133	7
BEXIMCO	105.6	104.1	27.9	267	32
BRACBANK	38.5	34.7	23.2	664	16
SQURPHARMA	210.2	195.0	22.7	109	2
INTRACO	43.5	37.6	20.8	500	4
BDTHAIFOOD	45.2	45.2	9.0	200	1
BSCCL	200.0	199.8	7.6	38	9
SEAPEARL	170.0	170.0	7.1	42	3
KDSALTD	89.2	80.0	5.9	68	3
ACMELAB	80.0	76.6	4.8	61	7
BATBC	480.0	479.8	4.1	9	7
SALVOCHEM	65.1	65.1	3.7	56	1
AOL	36.5	36.5	3.7	100	1
PTL	70.0	69.5	3.1	44	3
FEDERALINS	28.0	28.0	2.6	94	1
DUTCHBANGL	59.0	59.0	2.3	38	2
SPCL	61.3	61.3	1.8	29	3
BPML	95.0	95.0	1.6	17	1
BERGERPBL	1,606.0	1,605.0	1.5	1	3
Total			892.9		144

Important DSE News
PREMIERCEM

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Premier Cement Mills PLC' instead of 'Premier Cement Mills Limited' with effect from December 01, 2022. Other things (except name) will remain unchanged.

AMBEEPHA

The company has further informed that the stock dividend declared by them is subject to the approval of Bangladesh Securities and Exchange Commission as per BSEC Notification No. BSEC/CMRRCD/2009-193/46/Admin/138 dated October 03, 2022. Record date: 12.12.2022.

JHRML

Dhaka Stock Exchange Limited (DSE) has approved the proposed sector change of the Company. Accordingly, the business sector of JMI Hospital Requisite Manufacturing Limited will be changed to "Pharmaceuticals & Chemicals " instead of "Miscellaneous" sector with effect from November 23, 2022. Other things (except sector) will remain unchanged.

ESQUIRENIT

(Q1 Un-audited): Refer to their earlier news disseminated by DSE on 15.11.2022 regarding Q1 Financials, the Company has further informed that Consolidated NAV per share (with revaluation reserve) would be Tk. 65.30 instead of Tk. 65.68, Consolidated NAV per share (without revaluation reserve) would be Tk. 37.57 instead of Tk. 37.96 and Consolidated NOCFPS would be Tk. 2.57 instead of Tk. 2.53 for the 1st Quarter ended September 30, 2022. Other information of the earlier disclosure will remain unchanged.

(Dividend Declaration): Refer to their earlier news disseminated by DSE on 31.10.2022 regarding Dividend Declaration, the Company has further informed that Consolidated NAV per share (with revaluation reserve) would be Tk. 65.21 instead of Tk. 65.04, Consolidated NAV per share (without revaluation reserve) would be Tk. 37.48 instead of Tk. 37.31 and Consolidated NOCFPS would be Tk. 3.11 instead of Tk. 3.29 for the year ended June 30, 2022. Other information of the earlier disclosure will remain unchanged.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
S. Alam Cold Rolled Steels Ltd.	-	0.0%	5.0%	Record Date	24-Nov-22
Golden Harvest Agro Industries Ltd.	-	0.0%	2.0%	Record Date	24-Nov-22
Alltex Industries Ltd.	-	0.0%	1.0%	Record Date	24-Nov-22
Fortune Shoes Limited	-	5.0%	10.0%	Record Date	24-Nov-22
Olympic Industries Ltd.	-	0.0%	45.0%	Record Date	24-Nov-22
Hwa Well Textiles (BD) Limited	-	0.0%	25.0%	Record Date	24-Nov-22
Simtex Industries Limited	-	0.0%	8.0%	Record Date	24-Nov-22
Prime Textile Spinning Mills Limited	-	0.0%	2.0%	Record Date	24-Nov-22

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