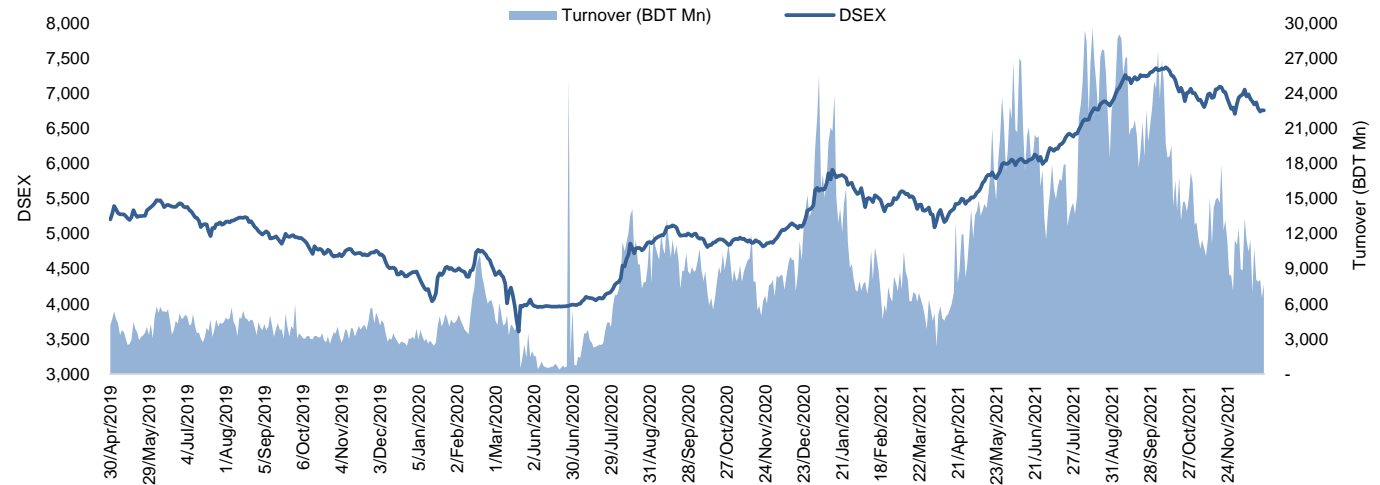


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.04%) lost 2.81 points and closed at 6,754.45. The blue-chip index DS30 (-0.08%), the Shariah-based index DSES (-0.18%), and the large-cap index CDSET (-0.14%) closed at 2,536.45, 1,433.90, and 1,365.21 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.41% followed by Fuel & Power (-0.36%), NBFi (-0.31%), Pharmaceutical (-0.29%), Food & Allied (-0.26%), Telecommunication (+0.00%), and Engineering (+0.06%), respectively. Block trades contributed 0.7% of the overall market turnover. Bangladesh Export Import Company Ltd. (+0.6%) was the most traded share with a turnover of BDT 916 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,754.45	6,757.26	-2.81	-0.04%	+25.0%
DS30	2,536.45	2,538.51	-2.06	-0.08%	+29.1%
DSES	1,433.90	1,436.53	-2.63	-0.18%	+15.4%
CDSET	1,365.21	1,367.19	-1.98	-0.14%	+21.6%

	Advanced	Declined	Unchanged	Total
All Category	142	186	49	377
A Category (Equity)	104	135	33	272
B Category (Equity)	21	34	9	64
N Category (Equity)	3	9	0	12
Z Category (Equity)	14	8	7	29
Mutual Funds	4	17	15	36
Corporate Bonds	3	0	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,428,231	5,432,005	-0.1%
	Mn USD	63,266	63,310	
Turnover	Mn BDT	7,675	6,520	+17.7%
	Mn USD	89	76	
Volume	Mn Shares	154	151	+1.8%
No. of Trade		170,980	158,748	+7.7%

Anika Mafiz
Research Analyst
 (880) 1708805206
 anika.mafiz@bracepl.com

Fahim Hassan
Research Associate
 (880) 1709636546
 fahim.hassan@bracepl.com

Figure: Sectorial Turnover (BDT)

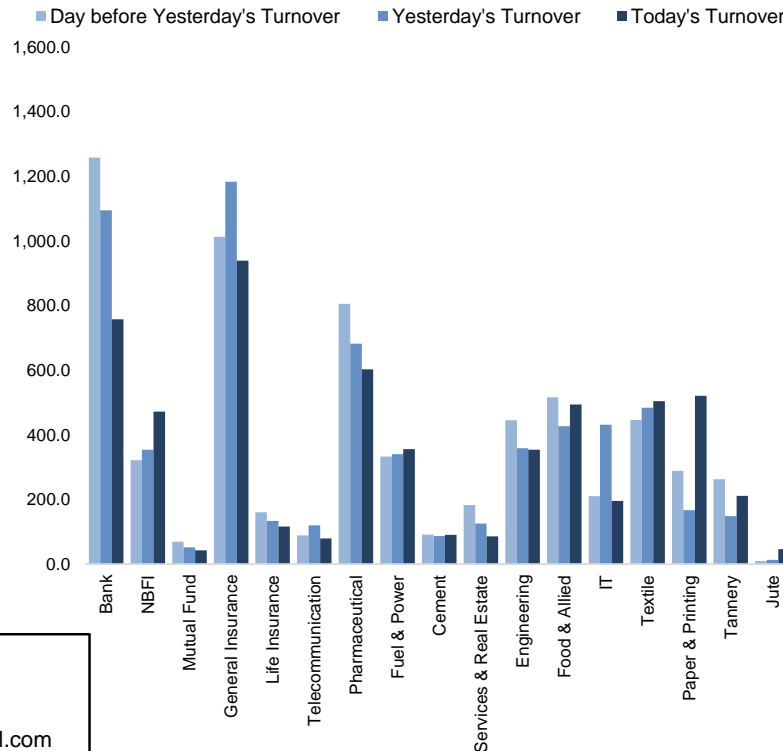
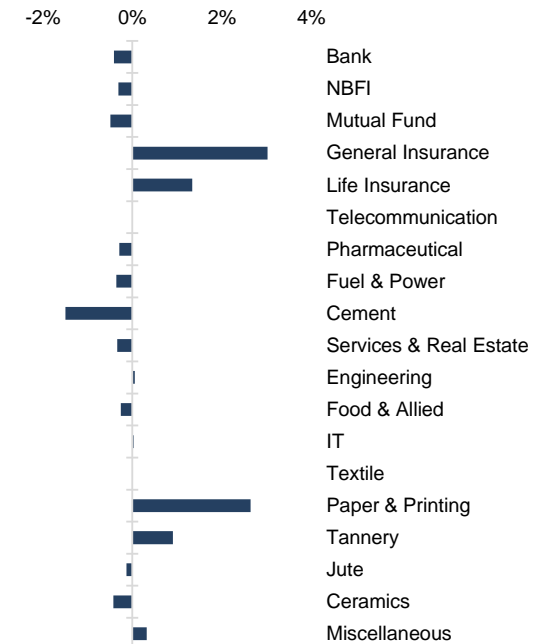


Figure: Sectorial Mcap Change



Market PE 16.8x
Market PB 1.9x

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	1,574	1,580	-6.46	-0.41%	32	719,208	14.9%	757.3	10.8%	8.0x	0.9x	GP	472,470	9.8%	28.8	13.0x	11.4x
NBFI	2,278	2,286	-7.11	-0.31%	23	225,005	4.7%	471.7	6.7%	21.3x	4.0x	WALTONHIL	354,123	7.3%	10.0	23.3x	3.8x
Mutual Fund	885	889	-4.33	-0.49%	37	40,797	0.8%	42.4	0.6%	NM	0.8x	BATBC	345,438	7.1%	80.7	25.2x	8.6x
General Insurance	4,678	4,541	+137.28	+3.02%	39	134,049	2.8%	938.9	13.4%	21.1x	2.3x	SQURPHARMA	189,701	3.9%	62.6	11.2x	2.0x
Life Insurance	2,655	2,620	+35.05	+1.34%	13	75,236	1.6%	116.4	1.7%	NM	NM	ROBI	189,089	3.9%	40.1	82.3x	2.9x
Telecommunication	5,844	5,844	+0.06	+0.00%	3	692,479	14.3%	79.7	1.1%	17.0x	5.9x	UPGDCL	143,359	3.0%	8.7	13.2x	4.0x
Pharmaceutical	3,907	3,918	-11.21	-0.29%	32	718,488	14.9%	602.3	8.6%	18.9x	2.6x	RENATA	139,855	2.9%	12.2	26.9x	5.2x
Fuel & Power	1,797	1,804	-6.47	-0.36%	23	469,394	9.7%	355.7	5.1%	11.6x	1.2x	BEXIMCO	136,881	2.8%	915.8	13.6x	1.9x
Cement	2,465	2,502	-37.30	-1.49%	7	128,689	2.7%	90.4	1.3%	17.9x	2.7x	ICB	95,086	2.0%	3.7	67.3x	2.1x
Services & Real Estate	1,313	1,317	-4.41	-0.33%	8	51,510	1.1%	86.0	1.2%	NM	1.0x	BXPHARMA	87,661	1.8%	58.3	15.9x	2.3x
Engineering	4,746	4,744	+2.66	+0.06%	42	570,928	11.8%	353.5	5.1%	19.0x	2.1x	LHBL	84,664	1.8%	71.0	21.4x	4.4x
Food & Allied	25,273	25,338	-65.00	-0.26%	20	450,763	9.3%	494.2	7.1%	30.8x	9.1x	BERGERPBL	81,848	1.7%	0.9	26.3x	6.8x
IT	3,310	3,309	+1.02	+0.03%	11	42,210	0.9%	195.4	2.8%	36.1x	3.0x	BRACBANK	74,203	1.5%	20.6	12.9x	1.5x
Textile	1,481	1,481	+0.22	+0.02%	58	161,396	3.3%	503.6	7.2%	35.0x	1.0x	MARICO	72,803	1.5%	3.7	22.1x	30.9x
Paper & Printing	9,541	9,296	+245.73	+2.64%	6	31,866	0.7%	520.3	7.4%	NM	2.3x	BEACONPHAR	54,770	1.1%	22.4	47.3x	9.6x
Tannery	3,349	3,319	+30.10	+0.91%	6	35,262	0.7%	211.4	3.0%	NM	3.5x	ISLAMIBANK	51,520	1.1%	13.0	9.6x	0.8x
Jute	9,527	9,539	-12.13	-0.13%	3	2,259	0.0%	46.6	0.7%	NM	22.7x	DUTCHBANGL	49,715	1.0%	11.4	8.5x	1.4x
Ceramics	678	681	-2.89	-0.42%	5	30,679	0.6%	45.7	0.7%	31.4x	2.0x	SUMITPOWER	41,540	0.9%	26.4	7.8x	1.1x
Miscellaneous	4,825	4,810	+15.56	+0.32%	14	251,805	5.2%	1,086.2	15.5%	17.9x	2.3x	POWERGRID	39,556	0.8%	24.3	11.9x	0.4x
												UNILEVERCL	37,970	0.8%	14.4	82.9x	28.3x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAVAREFR	199.1	+10.0%	1.8	NM	326.4x
STYLECRAFT	136.1	+9.9%	52.5	NM	6.8x
ASIAINS	108.7	+8.7%	158.4	38.1x	3.9x
BNICL	139.4	+8.6%	95.0	48.3x	6.4x
PROVATIINS	121.4	+7.3%	13.4	28.0x	5.8x
AGRANINS	61.0	+6.6%	70.1	25.1x	3.4x
SONALIPAPR	840.7	+6.2%	434.4	NM	3.5x
TAMIJTEX	172.4	+6.2%	18.1	69.8x	2.1x
SHURWID	18.8	+5.6%	22.0	8.6x	1.5x
JANATAINS	45.3	+5.3%	25.8	32.9x	3.0x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,121	6.8%	11.2x	2.0x
BEXIMCO	95,064	5.2%	13.6x	1.9x
BATBC	91,368	5.0%	25.2x	8.6x
RENATA	68,277	3.8%	26.9x	5.2x
BXPHARMA	61,205	3.4%	15.9x	2.3x
GP	47,247	2.6%	13.0x	11.4x
BRACBANK	39,891	2.2%	12.9x	1.5x
BEACONPHAR	38,337	2.1%	47.3x	9.6x
LHBL	29,903	1.6%	21.4x	4.4x
ISLAMIBANK	25,081	1.4%	9.6x	0.8x
EBL	24,508	1.3%	6.5x	1.1x
OLYMPIC	19,466	1.1%	17.1x	3.3x
PUBALIBANK	19,162	1.1%	5.3x	0.7x
CITYBANK	19,125	1.1%	6.4x	0.9x
ROBI	18,814	1.0%	82.3x	2.9x
IFIC	18,364	1.0%	14.1x	1.0x
BSRMLTD	17,587	1.0%	5.8x	1.0x
NBL	16,887	0.9%	6.7x	0.4x
ALARABANK	16,404	0.9%	10.2x	1.2x
ORIONPHARM	15,296	0.8%	27.5x	1.2x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	156.2	+0.6%	915.8	13.6x	1.9x
SONALIPAPR	840.7	+6.2%	434.4	NM	3.5x
GSPFINANCE	27.6	+2.2%	244.4	17.0x	1.4x
ONEBANKLTD	13.8	-2.1%	240.6	7.0x	0.7x
FORTUNE	98.0	+2.1%	164.9	42.1x	6.6x
ASIAINS	108.7	+8.7%	158.4	38.1x	3.9x
GENEXIL	168.3	+0.8%	151.1	49.9x	9.4x
SKICL	84.9	+3.5%	108.1	31.9x	4.7x
EASTRNLUB	3,496.9	-5.0%	104.2	95.0x	16.4x
IFIC	17.1	-1.2%	100.1	14.1x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PAPERPROC	206.8	-6.4%	39.2	NM	20.1x
ZEALBANGLA	123.5	-6.0%	0.4	NM	NM
NTC	636.5	-5.9%	23.8	NM	7.3x
LIBRAINFU	1,070.3	-5.3%	36.7	NM	0.8x
EASTRNLUB	3,496.9	-5.0%	104.2	95.0x	16.4x
GEMINISEA	292.6	-4.4%	72.2	48.6x	117.5x
HFL	21.9	-4.4%	24.7	NM	0.6x
RAHIMAFOOD	346.6	-4.2%	47.5	NM	37.1x
PHARMAID	640.6	-4.1%	80.4	37.1x	6.5x
ICBIBANK	5.0	-3.8%	6.7	NM	NM

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MONNOCERA	104.1	104.1	1.0	1,200	124.92
SONALIPAPR	820.0	770.0	10.0	153	122.03
FORTUNE	105.6	105.1	2.0	1,010	106.62
RENATA	1,311.7	1,311.7	1.0	65	85.26
LINDEBD	1,684.0	1,684.0	1.0	51	85.04
ORIONPHARM	98.7	97.0	3.0	516	50.07
BGIC	51.0	51.0	1.0	842	42.95
PROVATIINS	124.1	114.0	4.0	93	10.83
BATASHOE	891.0	891.0	1.0	12	10.69
GP	350.0	349.8	3.0	29	10.27

*NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MONNOCERA	104.1	104.1	124.9	1,200	1
SONALIPAPR	820.0	770.0	122.0	153	10
FORTUNE	105.6	105.1	106.6	1,010	2
RENATA	1,311.7	1,311.7	85.3	65	1
LINDEBD	1,684.0	1,684.0	85.0	51	1
ORIONPHARM	98.7	97.0	50.1	516	3
BGIC	51.0	51.0	42.9	842	1
PROVATIINS	124.1	114.0	10.8	93	4
BATASHOE	891.0	891.0	10.7	12	1
GP	350.0	349.8	10.3	29	3
IBBLPBOND	1,021.0	1,021.0	7.0	7	1
PENINSULA	35.9	35.9	6.2	171	4
PHOENIXFIN	27.7	27.7	2.2	81	1
POWERGRID	59.0	59.0	2.0	34	1
INDEXAGRO	133.7	123.5	1.7	13	3
SALVOCHEM	54.6	54.6	1.6	29	1
STYLECRAFT	124.0	124.0	1.2	9	2
PTL	97.0	97.0	0.8	8	1
AL-HAJTEX	74.8	74.8	0.7	10	1
ASIAINS	96.0	96.0	0.7	7	1
GOLDENSON	22.4	22.4	0.7	30	1
PHARMAID	670.0	670.0	0.7	1	1
Total			676.9		50

Important DSE News
MATINSPINN

Credit Rating Information and Services Limited (CRISL) has rated the Company as "AA" in the long term and "ST- 3" in the short term along with a stable outlook based on audited financial statements of the Company up to June 30, 2021, unaudited financials up to September 30, 2021, and other relevant quantitative and qualitative information up to the date of rating declaration.

SQUARETEXT

Credit Rating Information and Services Limited (CRISL) has rated the Company as "AA" in the long term and "ST-1" in the short term along with a stable outlook in consideration of its audited financials up to June 30, 2021; unaudited financials up to September 30, 2021, and other relevant quantitative as well as qualitative information up to the date of rating declaration.

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.