

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.92%) lost 64.39 points and closed at 6,920.35. The blue-chip index DS30 (-1.07%), the Shariah-based index DSES (-0.55%), and the large-cap index CDSET (-0.69%) closed at 2,604.09, 1,467.40, and 1,400.99 points, respectively. All the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.65% followed by Bank (-1.09%), Pharmaceutical (-0.68%), Fuel & Power (-0.62%), Engineering (-0.36%), Telecommunication (-0.01%), and Food & Allied (+1.28%), respectively. Block trades contributed 0.4% of the overall market turnover. One Bank Limited (-9.8%) was the most traded share with a turnover of BDT 885 million.

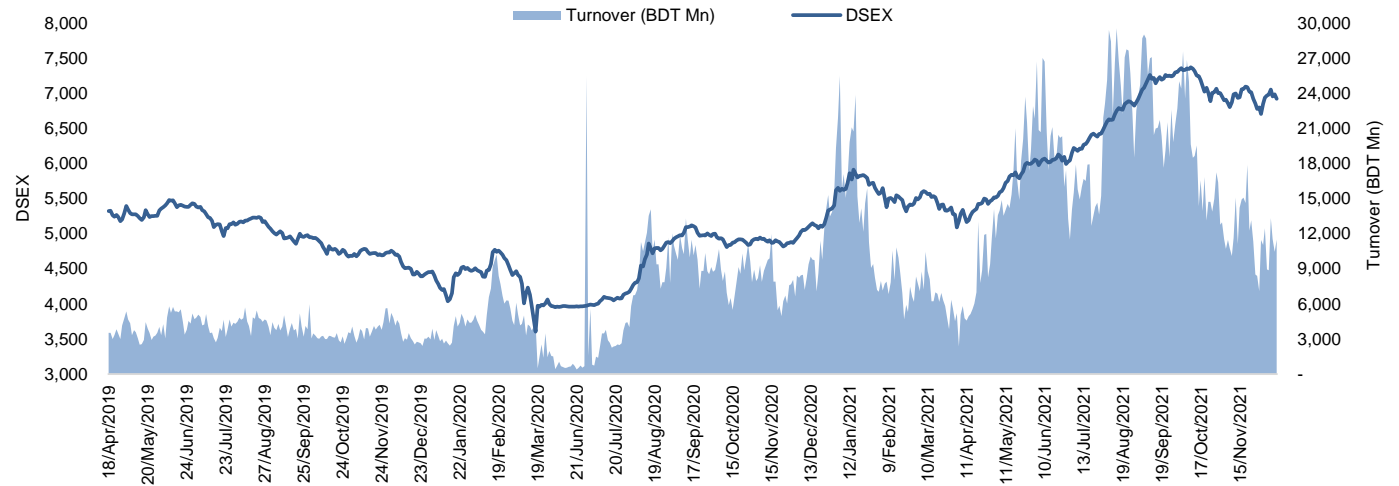


Figure: Sectorial Turnover (BDT)

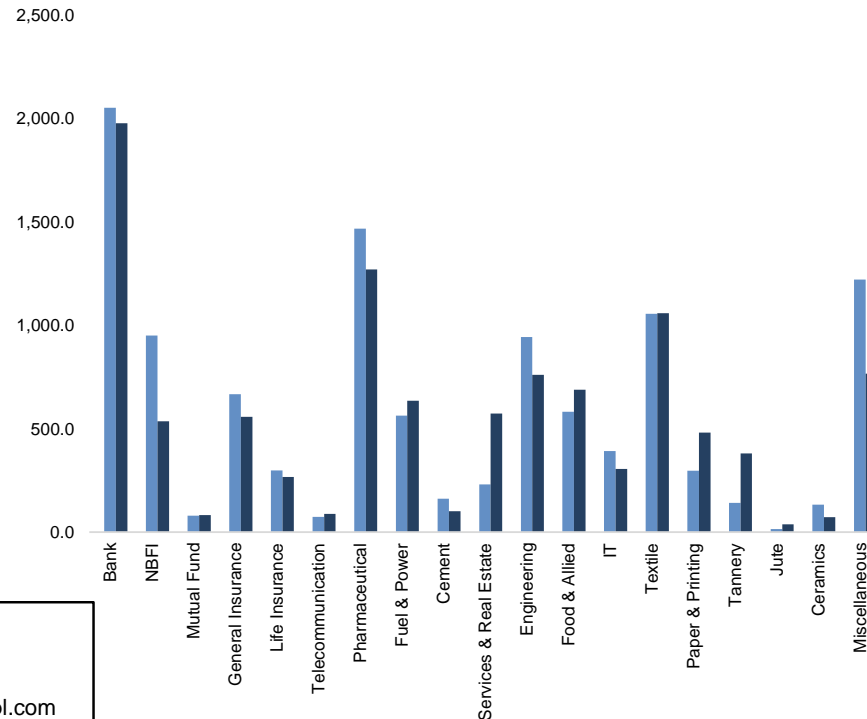
Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,920.35	6,984.74	-64.39	-0.92%	+28.1%
DS30	2,604.09	2,632.19	-28.10	-1.07%	+32.6%
DSES	1,467.40	1,475.46	-8.06	-0.55%	+18.1%
CDSET	1,400.99	1,410.77	-9.78	-0.69%	+24.8%

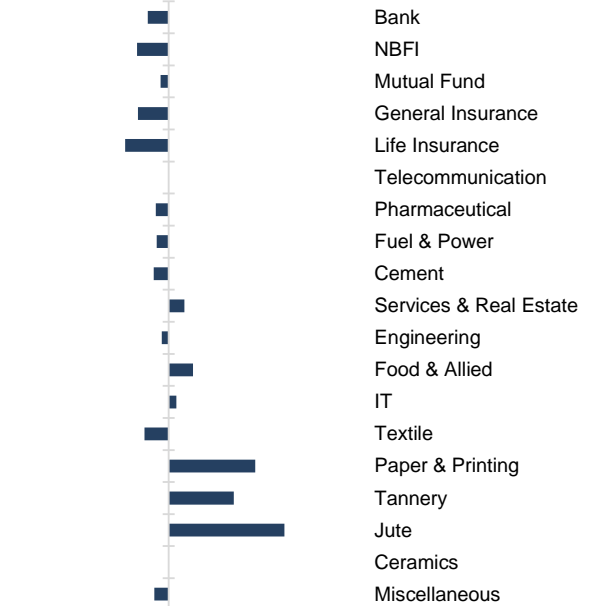
	Advanced	Declined	Unchanged	Total
All Category	99	242	35	376
A Category (Equity)	67	179	33	279
B Category (Equity)	14	41	0	55
N Category (Equity)	2	9	1	12
Z Category (Equity)	16	13	1	30
Mutual Funds	3	17	16	36
Corporate Bonds	0	3	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,549,326	5,571,905	-0.4%
	Mn USD	64,677	64,941	
Turnover	Mn BDT	11,482	10,435	+10.0%
	Mn USD	134	122	
Volume	Mn Shares	301	256	+17.6%
No. of Trade		224,470	199,331	+12.6%

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover



Market PE 17.2x Market PB 2.0x



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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	1,634	1,652	-18.07	-1.09%	32	742,623	15.0%	1,976.0	18.6%	8.2x	0.9x	GP	484,488	9.8%	30.1	13.3x	11.6x
NBFI	2,445	2,486	-41.03	-1.65%	23	231,127	4.7%	536.3	5.0%	21.9x	4.1x	WALTONHIL	358,970	7.3%	6.9	23.6x	3.9x
Mutual Fund	916	920	-3.95	-0.43%	37	42,235	0.9%	82.2	0.8%	NM	0.8x	BATBC	355,860	7.2%	238.8	25.9x	8.9x
General Insurance	4,684	4,761	-76.96	-1.62%	39	125,947	2.5%	557.9	5.2%	19.8x	2.2x	ROBI	204,279	4.1%	35.8	88.9x	3.1x
Life Insurance	2,620	2,682	-61.20	-2.28%	13	74,147	1.5%	267.0	2.5%	NM	NM	SQURPHARMA	193,867	3.9%	58.2	11.4x	2.0x
Telecommunication	6,027	6,028	-0.72	-0.01%	3	719,687	14.6%	88.1	0.8%	17.7x	6.2x	UPGDCL	148,344	3.0%	18.5	13.6x	4.2x
Pharmaceutical	4,006	4,033	-27.44	-0.68%	32	730,401	14.8%	1,269.2	11.9%	19.4x	2.7x	RENATA	140,541	2.8%	53.4	27.0x	5.2x
Fuel & Power	1,888	1,899	-11.83	-0.62%	23	486,784	9.8%	635.5	6.0%	12.1x	1.2x	BEXIMCO	140,123	2.8%	556.6	13.9x	1.9x
Cement	2,620	2,640	-20.47	-0.78%	7	134,092	2.7%	101.0	0.9%	18.6x	2.8x	ICB	98,551	2.0%	7.8	69.8x	2.2x
Services & Real Estate	1,397	1,386	+11.42	+0.82%	8	54,712	1.1%	573.5	5.4%	NM	1.1x	BXPHERMA	89,445	1.8%	94.5	16.2x	2.3x
Engineering	4,870	4,887	-17.38	-0.36%	42	578,504	11.7%	760.1	7.1%	19.2x	2.2x	LHBL	88,845	1.8%	78.9	22.5x	4.6x
Food & Allied	25,747	25,421	+326.36	+1.28%	20	460,884	9.3%	688.9	6.5%	31.5x	9.3x	BERGERPBL	83,081	1.7%	4.5	26.7x	6.9x
IT	3,449	3,434	+14.11	+0.41%	11	44,102	0.9%	305.6	2.9%	37.8x	3.1x	BRACBANK	75,873	1.5%	34.2	13.2x	1.5x
Textile	1,604	1,624	-20.69	-1.27%	58	168,549	3.4%	1,058.3	9.9%	36.6x	1.1x	MARICO	73,641	1.5%	22.3	22.3x	31.3x
Paper & Printing	7,452	7,128	+323.84	+4.54%	6	23,666	0.5%	480.3	4.5%	NM	1.7x	BEACONPHAR	54,909	1.1%	135.5	63.6x	10.3x
Tannery	3,145	3,041	+103.72	+3.41%	6	34,635	0.7%	380.8	3.6%	NM	3.5x	ISLAMIBANK	51,520	1.0%	11.2	9.6x	0.8x
Jute	8,560	8,070	+489.25	+6.06%	3	2,193	0.0%	37.4	0.4%	NM	22.1x	DUTCHBANGL	51,043	1.0%	34.3	8.7x	1.4x
Ceramics	701	701	-0.25	-0.04%	5	32,399	0.7%	72.7	0.7%	33.2x	2.1x	SUMITPOWER	43,142	0.9%	13.3	8.1x	1.1x
Miscellaneous	4,953	4,990	-37.34	-0.75%	14	256,661	5.2%	766.5	7.2%	18.3x	2.3x	POWERGRID	41,338	0.8%	167.5	12.5x	0.5x
												TITASGAS	36,700	0.7%	6.6	10.7x	0.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ARAMIT	353.0	+8.7%	22.3	34.8x	1.8x
AMBEEPHA	486.9	+8.7%	4.0	NM	25.9x
RAHIMTEXT	280.6	+8.7%	1.0	NM	7.3x
MONOSPOOL	172.6	+8.1%	10.5	NM	4.2x
ISNLTD	48.8	+8.0%	24.5	NM	18.8x
APEXFOODS	159.8	+7.5%	41.0	85.0x	1.2x
SONALIPAPR	691.1	+7.5%	401.8	90.4x	2.4x
MONNOAGML	618.0	+7.5%	16.8	NM	44.2x
LIBRAINFU	952.6	+7.5%	22.4	NM	0.8x
NTC	591.1	+7.5%	4.9	NM	6.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ONEBANKLTD	16.5	-9.8%	884.7	8.4x	0.9x
MITHUNKNIT	13.7	-6.2%	0.6	NM	0.7x
PHOENIXFIN	25.4	-5.9%	7.5	19.3x	1.1x
SKICL	74.8	-5.9%	152.7	28.1x	4.1x
ACMEPL	31.5	-5.7%	71.0	19.3x	1.7x
FIRSTSBANK	13.4	-5.6%	233.1	4.8x	0.7x
OAL	11.9	-5.6%	9.0	NM	0.9x
SKTRIMS	31.7	-5.4%	19.8	36.9x	2.2x
TOSRIFA	17.7	-5.3%	19.4	26.0x	0.6x
AAMRANET	46.1	-5.1%	21.8	27.1x	1.3x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	126,847	6.8%	11.4x	2.0x
BEXIMCO	97,316	5.2%	13.9x	1.9x
BATBC	94,125	5.1%	25.9x	8.9x
RENATA	68,612	3.7%	27.0x	5.2x
BXPHERMA	62,451	3.4%	16.2x	2.3x
GP	48,449	2.6%	13.3x	11.6x
BRACBANK	40,790	2.2%	13.2x	1.5x
BEACONPHAR	38,434	2.1%	63.6x	10.3x
LHBL	31,380	1.7%	22.5x	4.6x
EBL	25,574	1.4%	6.8x	1.2x
ISLAMIBANK	25,081	1.4%	9.6x	0.8x
ROBI	20,326	1.1%	88.9x	3.1x
OLYMPIC	19,866	1.1%	17.4x	3.4x
CITYBANK	19,627	1.1%	6.5x	0.9x
PUBALIBANK	19,232	1.0%	5.3x	0.7x
IFIC	19,223	1.0%	14.7x	1.0x
NBL	17,776	1.0%	7.0x	0.5x
ALARABANK	16,466	0.9%	10.2x	1.2x
SUMITPOWER	15,872	0.9%	8.1x	1.1x
ORIONPHARM	15,853	0.9%	28.5x	1.2x

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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ONEBANKLTD	16.5	-9.8%	884.7	8.4x	0.9x
BEXIMCO	159.9	-2.2%	556.6	13.9x	1.9x
SAIFPOWER	44.4	+4.7%	470.1	24.8x	2.7x
SONALIPAPR	691.1	+7.5%	401.8	90.4x	2.4x
FORTUNE	92.9	+3.7%	314.5	39.9x	6.3x
BATBC	659.0	+1.4%	238.8	25.9x	8.9x
FIRSTSBANK	13.4	-5.6%	233.1	4.8x	0.7x
IFIC	17.9	-3.2%	227.8	14.7x	1.0x
DELTA LIFE	186.4	-5.0%	201.9	NM	NM
GSPFINANCE	26.2	-4.0%	182.1	14.6x	1.2x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
GENEXIL	175.0	160.0	4.0	1,821	310.38
ONEBANKLTD	20.0	16.5	5.0	11,272	200.72
FORTUNE	98.0	98.0	1.0	1,000	98.00
PRIMEINSUR	64.0	64.0	2.0	1,000	64.00
RENATA	1,318.0	1,318.0	5.0	43	56.67
IDLC	60.0	60.0	1.0	500	30.00
SALVOCHEM	55.0	55.0	1.0	301	16.55
UPGDCL	235.0	235.0	1.0	47	11.04
SAIFPOWER	39.5	39.0	5.0	228	8.91
PTL	84.0	84.0	1.0	85	7.13

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
GENEXIL	175.0	160.0	310.4	1,821	4
ONEBANKLTD	20.0	16.5	200.7	11,272	5
FORTUNE	98.0	98.0	98.0	1,000	1
PRIMEINSUR	64.0	64.0	64.0	1,000	2
RENATA	1,318.0	1,318.0	56.7	43	5
IDLC	60.0	60.0	30.0	500	1
SALVOCHEM	55.0	55.0	16.5	301	1
UPGDCL	235.0	235.0	11.0	47	1
SAIFPOWER	39.5	39.0	8.9	228	5
PTL	84.0	84.0	7.1	85	1
REPUBLIC	56.1	56.1	5.6	100	1
SHEPHERD	31.8	31.0	5.2	166	2
SAIHAMCOT	18.1	18.1	5.1	282	1
SONALIPAPR	671.2	652.1	4.7	7	3
SHAHJABANK	23.1	23.1	4.6	200	1
EIL	37.2	37.2	3.9	105	1
BDFINANCE	66.0	66.0	2.4	37	1
ACTIVEFINE	26.5	26.5	2.0	75	1
SPCL	94.0	94.0	1.9	20	1
NRBCBANK	31.2	31.2	1.6	50	1
LHBL	78.2	78.2	1.2	16	1
DELTALIFE	197.0	197.0	1.0	5	1
Total			845.0		45

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Kattali Textile Limited	-	0.0%	10.0%	Record Date	13-Dec-21
Premier Leasing & Finance Limited	-	0.0%	0.0%	Record Date	14-Dec-21
S. S. Steel Limited	-	8.0%	2.0%	Record Date	15-Dec-21
Bangladesh Services Ltd.	-	0.0%	0.0%	Record Date	19-Dec-21
Eastern Cables Ltd.	-	0.0%	0.0%	Record Date	20-Dec-21
Silco Pharmaceuticals Limited	-	0.0%	10.0%	Record Date	20-Dec-21
Beacon Pharmaceuticals Limited	-	0.0%	15.0%	Record Date	20-Dec-21
Tung Hai Knitting & Dyeing Limited	-	0.0%	0.0%	Record Date	20-Dec-21
Beach Hatchery Ltd.	-	0.0%	1.0%	Record Date	22-Dec-21

Important DSE News
CVOPRL

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Entity Rating (Surveillance) of the Company as "BBB2" along with a stable outlook based on audited financial statements as on June 30, 2021, and bank liability position as of 30 September 2021.

SAMORITA

Dr. A. B. M. Haroon, one of the Sponsor Directors of the Company, has expressed his intention to transfer his 1,00,000 shares out of his total holding 15,05,354 shares of the Company to his son Mr. Md. Atiqul Basher (General Shareholder), 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.

MALEKSPIN

The Company has informed that "an unfortunate fire incident took place in the raw cotton warehouse of Malek Spinning Mills Ltd. factory premises at Shafipur, Kaliakoir, Gazipur around 7.00 p.m. on 10th December, 2021. Three Units of Fire Service Defense Authority, along with Company Fire Fighting Team brought the flame under control. However, as cotton bales are highly compressed, sporadic fire is happening which is being controlled by the Team. The cause and the extent of damage has not been ascertained and is being jointly looked into by Mill Authority, Fire Service Authority and Insurance surveyor. The warehouse and, cotton is covered by insurance Policy. There has been no casualty caused in the factory except one injured who is under treatment at Dhaka Medical College Hospital. Partial operation of the mill has resumed from the morning of 11th December, 2021.

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