

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.69%) lost 46.63 points and closed at 6,736.56. The blue-chip index DS30 (-0.75%), the Shariah-based index DSES (-0.73%), and the large-cap index CDSET (-0.77%) closed at 2,528.66, 1,432.65, and 1,362.48 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 1.31% followed by Telecommunication (-1.15%), Food & Allied (-1.09%), NBFi (-0.64%), Engineering (-0.57%), Pharmaceutical (-0.56%), and Bank (-0.49%), respectively. Block trades contributed 0.5% of the overall market turnover. Bangladesh Export Import Company Ltd. (-0.5%) was the most traded share with a turnover of BDT 1,288 million.

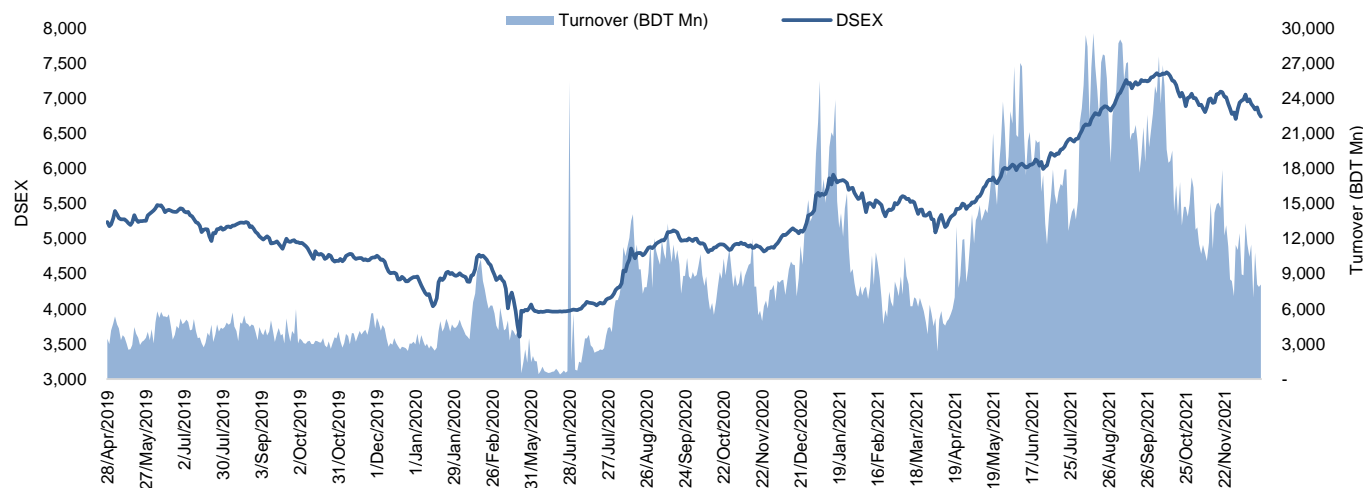


Figure: Sectorial Turnover (BDT)

Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,736.56	6,783.19	-46.63	-0.69%	+24.7%
DS30	2,528.66	2,547.71	-19.05	-0.75%	+28.8%
DSES	1,432.65	1,443.25	-10.59	-0.73%	+15.3%
CDSET	1,362.48	1,373.01	-10.53	-0.77%	+21.3%

	Advanced	Declined	Unchanged	Total
All Category	100	241	33	374
A Category (Equity)	80	164	29	273
B Category (Equity)	9	50	1	60
N Category (Equity)	2	10	0	12
Z Category (Equity)	9	17	3	29
Mutual Funds	5	18	13	36
Corporate Bonds	1	1	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,425,212	5,462,143	-0.7%
	Mn USD	63,231	63,661	
Turnover	Mn BDT	8,072	7,862	+2.7%
	Mn USD	94	92	
Volume	Mn Shares	185	205	-10.0%
No. of Trade		197,074	211,424	-6.8%

Figure: Sectorial Turnover (BDT)

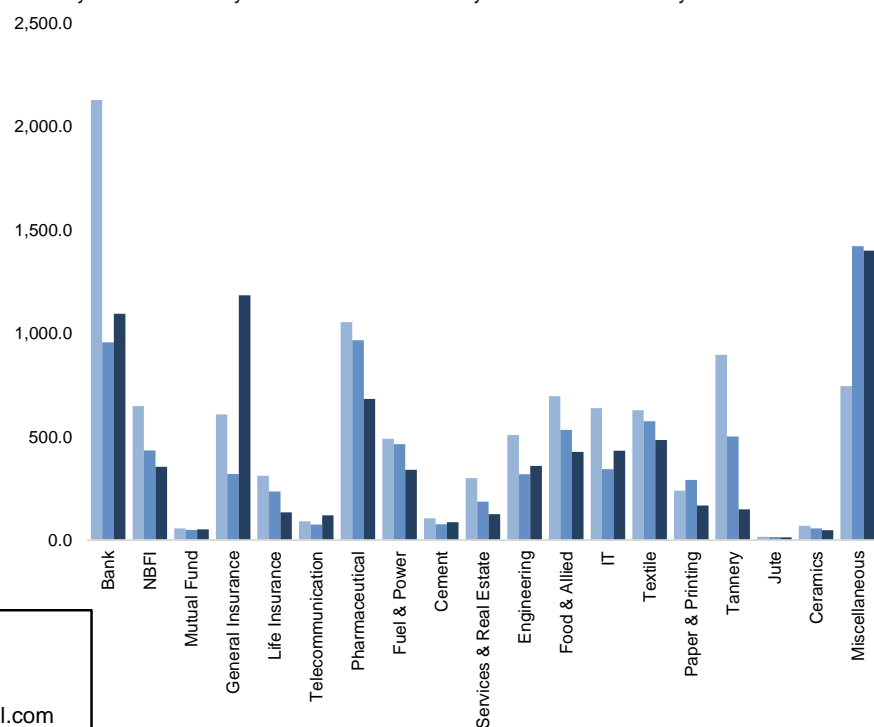
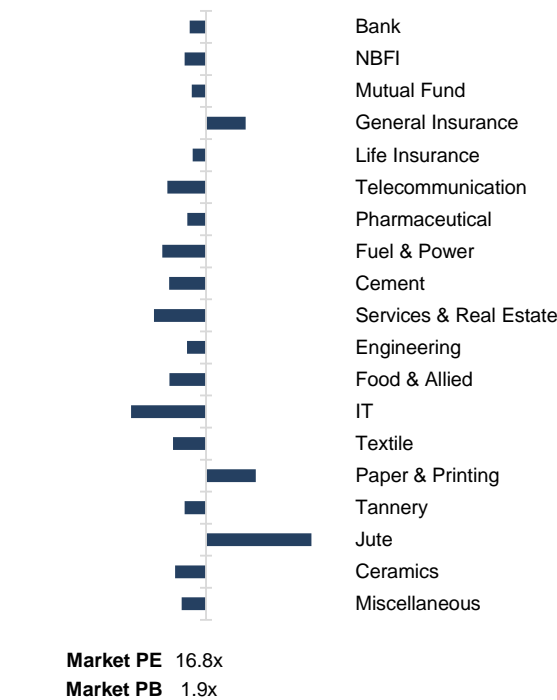


Figure: Sectorial Mcap Change



Market PE 16.8x
Market PB 1.9x

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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	1,550	1,557	-7.62	-0.49%	32	719,212	14.9%	1,094.4	14.3%	8.0x	0.9x	GP	471,660	9.8%	60.9	13.0x	11.3x
NBFI	2,228	2,242	-14.27	-0.64%	23	224,271	4.6%	354.3	4.6%	21.2x	4.0x	WALTONHIL	354,032	7.3%	24.0	23.3x	3.8x
Mutual Fund	881	885	-3.74	-0.42%	37	41,075	0.9%	51.5	0.7%	NM	0.8x	BATBC	345,060	7.1%	100.2	25.1x	8.6x
General Insurance	4,791	4,735	+55.77	+1.18%	39	132,787	2.7%	1,182.9	15.5%	20.9x	2.3x	ROBI	191,708	4.0%	44.0	83.5x	2.9x
Life Insurance	2,591	2,602	-10.42	-0.40%	13	74,098	1.5%	133.5	1.7%	NM	NM	SQURPHARMA	189,966	3.9%	41.6	11.2x	2.0x
Telecommunication	5,786	5,853	-67.16	-1.15%	3	693,480	14.4%	119.7	1.6%	17.0x	5.9x	UPGDCL	143,069	3.0%	26.6	13.2x	4.0x
Pharmaceutical	3,874	3,896	-21.85	-0.56%	32	719,733	14.9%	681.8	8.9%	18.9x	2.6x	RENATA	140,176	2.9%	15.7	26.9x	5.2x
Fuel & Power	1,777	1,800	-23.50	-1.31%	23	469,765	9.7%	340.1	4.4%	11.6x	1.2x	BEXIMCO	133,200	2.8%	1,288.3	13.2x	1.8x
Cement	2,461	2,488	-27.28	-1.10%	7	130,284	2.7%	87.2	1.1%	18.1x	2.7x	ICB	94,844	2.0%	3.4	67.1x	2.1x
Services & Real Estate	1,294	1,314	-20.38	-1.55%	8	51,806	1.1%	125.0	1.6%	NM	1.0x	BXPHARMA	87,126	1.8%	62.9	15.8x	2.3x
Engineering	4,715	4,742	-26.99	-0.57%	42	570,954	11.8%	358.2	4.7%	19.0x	2.1x	LHBL	86,058	1.8%	74.2	21.8x	4.5x
Food & Allied	24,844	25,117	-272.70	-1.09%	20	450,480	9.3%	426.8	5.6%	30.8x	9.1x	BERGERPBL	82,029	1.7%	1.7	26.4x	6.8x
IT	3,324	3,400	-75.94	-2.23%	11	42,677	0.9%	431.7	5.6%	36.5x	3.0x	BRACBANK	73,785	1.5%	55.4	12.8x	1.5x
Textile	1,460	1,474	-14.53	-0.99%	58	161,243	3.3%	484.0	6.3%	35.0x	1.0x	MARICO	73,124	1.5%	6.4	22.2x	31.1x
Paper & Printing	9,891	9,746	+144.34	+1.48%	6	31,741	0.7%	166.7	2.2%	NM	2.3x	BEACONPHAR	54,493	1.1%	0.0	47.1x	9.5x
Tannery	3,229	3,249	-20.69	-0.64%	6	35,265	0.7%	148.6	1.9%	NM	3.5x	ISLAMIBANK	51,359	1.1%	32.7	9.6x	0.8x
Jute	8,622	8,360	+262.34	+3.14%	3	2,120	0.0%	13.0	0.2%	NM	21.3x	DUTCHBANGL	49,778	1.0%	22.0	8.5x	1.4x
Ceramics	665	672	-6.17	-0.92%	5	30,634	0.6%	48.0	0.6%	31.4x	2.0x	SUMITPOWER	41,327	0.9%	21.0	7.8x	1.1x
Miscellaneous	4,695	4,730	-34.40	-0.73%	14	247,567	5.1%	1,399.6	18.3%	17.6x	2.2x	POWERGRID	39,628	0.8%	29.7	11.9x	0.4x
												UNILEVERCL	38,774	0.8%	13.2	84.7x	28.9x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	192.3	+9.8%	16.0	NM	13.5x
ASIAINS	104.9	+9.3%	278.6	36.8x	3.7x
PAPERPROC	211.2	+8.7%	49.3	NM	20.6x
NTC	635.1	+7.5%	41.7	NM	7.2x
ICBAGRANI1	9.1	+7.1%	2.7	NM	1.2x
PRAGATILIF	91.3	+6.7%	8.0	NM	NM
AMCL(PRAN)	307.1	+5.9%	63.4	55.0x	3.6x
LIBRAINFU	1,117.3	+5.6%	62.0	NM	0.9x
SONALIANS	486.5	+5.3%	10.0	NM	2.2x
BNICL	136.1	+5.3%	38.3	47.1x	6.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	12.9	-6.5%	23.1	NM	1.1x
KPCL	30.6	-6.1%	20.0	NM	1.4x
BEACHHATCH	28.8	-5.3%	15.3	NM	3.0x
SAVAREFR	174.9	-5.0%	0.3	NM	286.7x
FINEFOODS	45.4	-5.0%	10.2	NM	4.3x
ACTIVEFINE	26.6	-5.0%	87.0	68.2x	1.2x
SHURWID	18.0	-4.3%	14.0	8.2x	1.4x
GHCL	31.5	-4.3%	0.6	NM	0.6x
CVOPRL	191.0	-4.2%	50.7	NM	19.3x
FIRSTFIN	6.9	-4.2%	0.3	NM	6.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,295	6.9%	11.2x	2.0x
BEXIMCO	92,508	5.1%	13.2x	1.8x
BATBC	91,268	5.0%	25.1x	8.6x
RENATA	68,434	3.8%	26.9x	5.2x
BXPHARMA	60,831	3.4%	15.8x	2.3x
GP	47,166	2.6%	13.0x	11.3x
BRACBANK	39,667	2.2%	12.8x	1.5x
BEACONPHAR	38,143	2.1%	47.1x	9.5x
LHBL	30,396	1.7%	21.8x	4.5x
ISLAMIBANK	25,002	1.4%	9.6x	0.8x
EBL	24,708	1.4%	6.5x	1.1x
CITYBANK	19,340	1.1%	6.4x	0.9x
OLYMPIC	19,175	1.1%	16.8x	3.3x
ROBI	19,075	1.1%	83.5x	2.9x
PUBALIBANK	19,021	1.0%	5.2x	0.7x
BSRMLTD	17,957	1.0%	5.9x	1.0x
IFIC	17,720	1.0%	13.6x	0.9x
NBL	16,887	0.9%	6.7x	0.4x
ALARABANK	16,404	0.9%	10.2x	1.2x
ORIONPHARM	15,264	0.8%	27.5x	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
BEXIMCO	152.0	-0.5%	1,288.3	13.2x	1.8x
GENEXIL	171.2	-2.2%	372.6	50.7x	9.6x
ONEBANKLTD	14.2	+2.9%	332.1	7.2x	0.7x
ASIAINS	104.9	+9.3%	278.6	36.8x	3.7x
SKICL	86.0	+0.5%	174.0	32.3x	4.7x
IFIC	16.5	-1.2%	126.1	13.6x	0.9x
FORTUNE	97.2	-	122.9	41.7x	6.6x
GSPFINANCE	26.8	+1.5%	108.1	16.5x	1.4x
PTL	93.9	-0.7%	105.4	22.6x	3.4x
FIRSTSBANK	13.1	-0.8%	104.8	4.7x	0.7x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONALIPAPR	800.0	766.0	7.0	225	179.07
DUTCHBANGL	80.7	80.7	1.0	685	55.28
BATBC	638.1	638.1	1.0	79	50.35
EXIMBANK	12.5	12.5	1.0	3,794	47.43
COPPERTECH	33.0	33.0	1.0	1,030	33.99
GSPFINANCE	28.2	28.1	3.0	550	15.49
DELTALIFE	209.7	205.0	2.0	54	11.16
MARICO	2,300.0	2,300.0	1.0	2	4.95
EBL	41.0	41.0	1.0	100	4.10
WATACHEM	284.0	284.0	1.0	11	3.05

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	800.0	766.0	179.1	225	7
DUTCHBANGL	80.7	80.7	55.3	685	1
BATBC	638.1	638.1	50.3	79	1
EXIMBANK	12.5	12.5	47.4	3,794	1
COPPERTECH	33.0	33.0	34.0	1,030	1
GSPFINANCE	28.2	28.1	15.5	550	3
DELTALIFE	209.7	205.0	11.2	54	2
MARICO	2,300.0	2,300.0	4.9	2	1
EBL	41.0	41.0	4.1	100	1
WATACHEM	284.0	284.0	3.1	11	1
BRACBANK	54.0	54.0	2.2	40	1
PHOENIXFIN	27.7	27.7	1.9	68	1
AIL	46.9	46.9	1.9	40	1
LOVELLO	37.0	35.0	1.8	51	3
PRAGATIINS	82.0	82.0	1.6	20	1
FORTUNE	99.7	99.7	1.5	15	1
EASTRNLUB	3,506.1	3,506.1	1.4		2
PADMALIFE	46.9	46.9	0.9	19	1
ADVENT	30.1	30.1	0.9	29	1
GP	360.0	360.0	0.8	2	1
LANKABAFIN	41.0	41.0	0.7	18	1
AL-HAJTEX	72.5	72.5	0.7	10	1
Total			424.5		40

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Beach Hatchery Ltd.	-	0.0%	1.0%	Record Date	22-Dec-21

Important DSE News
RUNNERAUTO

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Entity (surveillance) Rating of the Company as "A1" based on audited financial statements up to June 30, 2021; bank liability position as on October 31, 2021, and other relevant quantitative as well as qualitative information up to the date of rating declaration.

APEXFOODS

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Entity (Surveillance) Rating of the Company as "A1" along with a stable outlook based on audited financial statements up to June 30, 2021; un-audited three months management prepared financial statements; bank liability position as on October 31, 2021, and other relevant quantitative and qualitative information up to the date of rating declaration.

PIONEERINS

Alpha Credit Rating Limited (AlphaRating) has rated the Company as "AAA" in the long term and "ST-1" in the short term along with a stable outlook based on audited financial statements of the Company as on December 31, 2020, and relevant qualitative information till December 18, 2021.

BSRMSTEEL

H. Akberali & Co. Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 8,50,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (CSE) within next 30 working days, as per Rule-4 of the BSEC (Substantial Acquisition of shares and Takeovers), Rules, 2018.

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