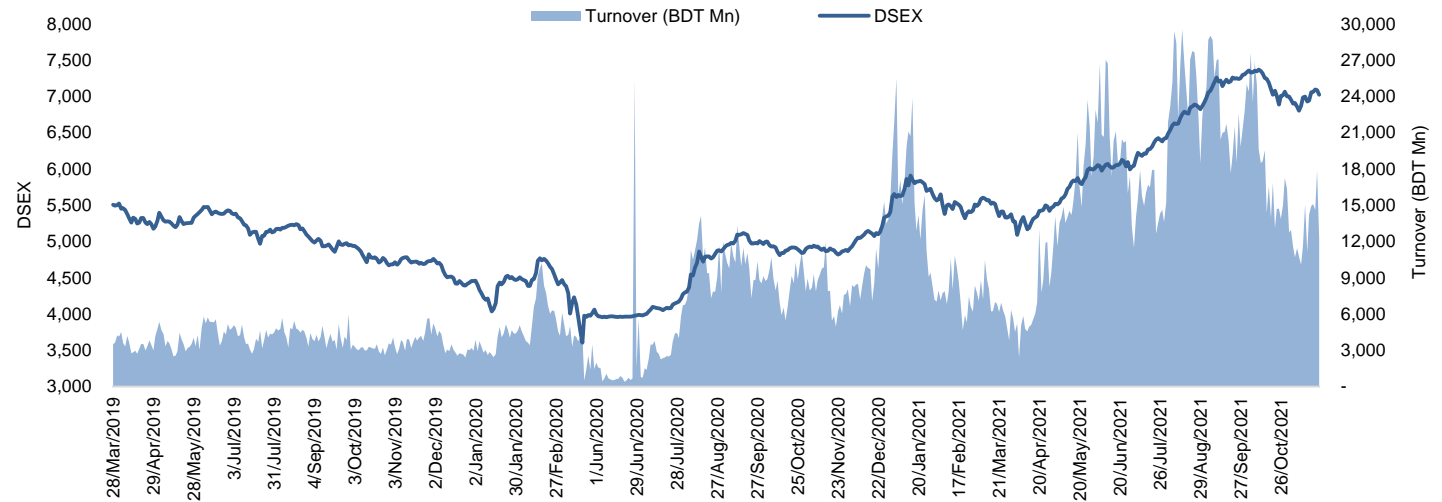


**Daily Market Update**

The market closed in red today. The benchmark index DSEX (-0.89%) lost 63.38 points and closed at 7,022.29. The blue-chip index DS30 (-0.63%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.81%) closed at 2,666.99, 1,470.97, and 1,434.50 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 2.90% followed by NBF1 (-1.70%), Food & Allied (-1.55%), Engineering (-0.36%), Pharmaceutical (-0.03%), Telecommunication (+0.16%), and Fuel & Power (+0.22%), respectively. Block trades contributed 0.6% of the overall market turnover. One Bank Limited (+6.8%) was the most traded share with a turnover of BDT 1,426 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	7,022.29	7,085.67	-63.38	-0.89%	+30.0%
DS30	2,666.99	2,683.84	-16.85	-0.63%	+35.8%
DSES	1,470.97	1,475.27	-4.30	-0.29%	+18.4%
CDSET	1,434.50	1,446.16	-11.66	-0.81%	+27.7%

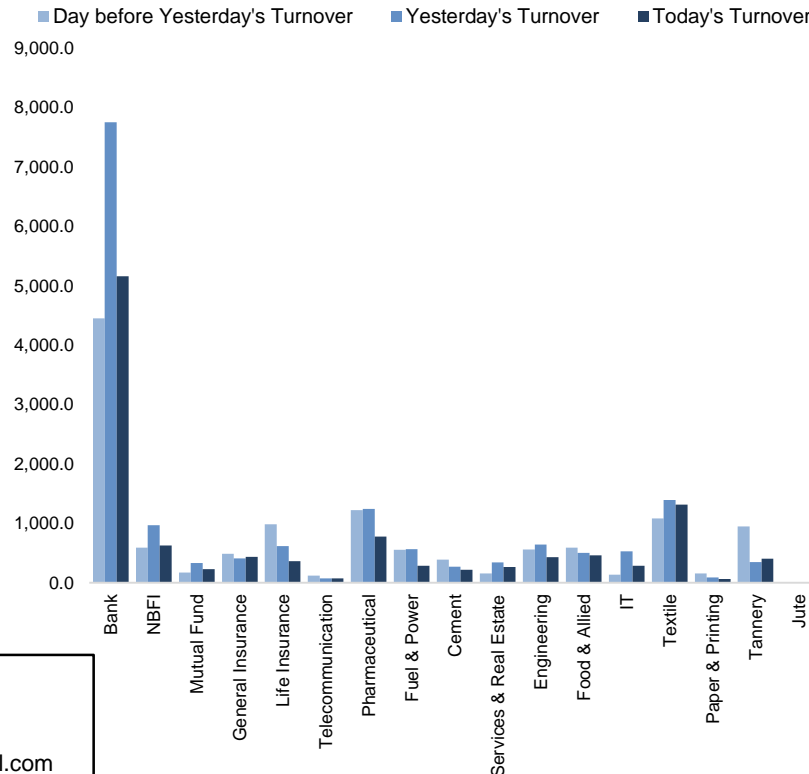
	Advanced	Declined	Unchanged	Total
All Category	106	214	39	359
A Category (Equity)	82	157	29	268
B Category (Equity)	13	35	5	53
N Category (Equity)	7	3	2	12
Z Category (Equity)	4	19	3	26
Mutual Funds	2	22	12	36
Corporate Bonds	1	1	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,565,089	5,602,191	
	Mn USD	65,318	65,753	-0.7%
Turnover	Mn BDT	12,260	17,863	
	Mn USD	144	210	-31.4%
Volume	Mn Shares	452	642	-29.6%
No. of Trade		185,133	241,225	-23.3%

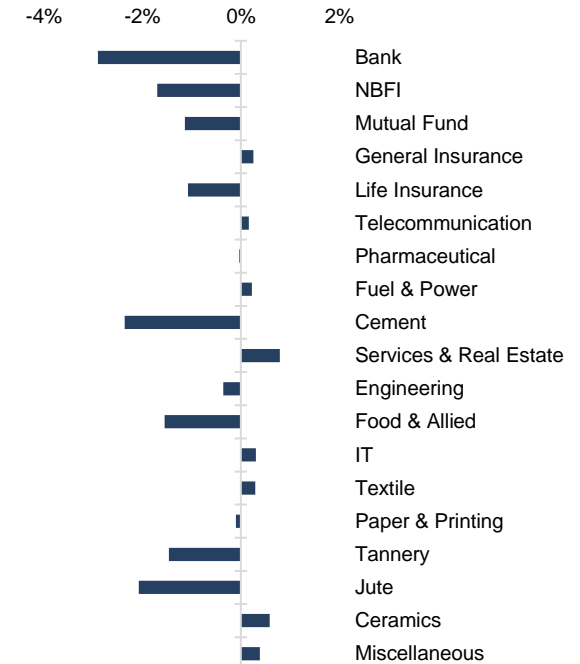
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**Figure: Sectorial Turnover (BDT)**



**Figure: Sectorial Mcap Change**



**Market PE 17.2x**  
**Market PB 2.0x**

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	1,706	1,757	-50.94	-2.90%	32	784,777	15.8%	5,157.2	44.5%	8.7x	0.9x	GP	485,973	9.8%	17.2	13.4x	11.7x
NBFI	2,347	2,388	-40.48	-1.70%	23	233,289	4.7%	626.1	5.4%	22.1x	4.0x	WALTONHIL	348,549	7.0%	11.6	22.9x	3.8x
Mutual Fund	964	976	-11.09	-1.14%	37	44,266	0.9%	228.7	2.0%	NM	0.9x	BATBC	342,792	6.9%	189.5	25.0x	8.5x
General Insurance	5,556	5,542	+14.23	+0.26%	39	128,721	2.6%	435.4	3.8%	20.2x	2.2x	ROBI	203,756	4.1%	29.6	88.7x	3.1x
Life Insurance	2,914	2,946	-31.60	-1.07%	13	78,418	1.6%	361.1	3.1%	NM	NM	SQURPHARMA	199,717	4.0%	0.0	11.7x	2.1x
Telecommunication	5,972	5,963	+9.82	+0.16%	3	719,395	14.5%	72.2	0.6%	17.7x	6.2x	UPGDCL	157,851	3.2%	0.0	14.5x	4.5x
Pharmaceutical	3,964	3,966	-1.25	-0.03%	32	731,023	14.7%	775.1	6.7%	19.3x	2.7x	BEXIMCO	153,882	3.1%	0.0	15.3x	2.1x
Fuel & Power	1,821	1,817	+4.04	+0.22%	23	485,172	9.8%	283.8	2.5%	12.0x	1.2x	RENATA	140,659	2.8%	20.6	27.0x	5.2x
Cement	2,535	2,597	-61.26	-2.36%	7	134,557	2.7%	216.0	1.9%	18.7x	2.8x	ICB	97,584	2.0%	7.6	69.1x	2.2x
Services & Real Estate	1,413	1,402	+11.13	+0.79%	8	52,646	1.1%	266.2	2.3%	NM	1.0x	BXPHARMA	96,137	1.9%	0.0	17.4x	2.5x
Engineering	4,682	4,699	-16.83	-0.36%	42	562,407	11.3%	428.2	3.7%	18.7x	2.1x	LHBL	90,471	1.8%	185.3	22.9x	4.7x
Food & Allied	25,443	25,844	-400.31	-1.55%	20	441,566	8.9%	461.5	4.0%	30.2x	8.9x	BERGERPBL	82,093	1.7%	0.4	26.4x	6.8x
IT	3,593	3,582	+10.84	+0.30%	11	43,663	0.9%	283.9	2.5%	37.4x	3.1x	BRACBANK	77,822	1.6%	209.4	13.6x	1.6x
Textile	1,586	1,581	+4.59	+0.29%	58	163,198	3.3%	1,314.0	11.3%	34.7x	1.0x	MARICO	72,453	1.5%	6.6	22.0x	30.8x
Paper & Printing	7,890	7,898	-7.91	-0.10%	6	21,569	0.4%	63.5	0.5%	NM	1.5x	DUTCHBANGL	56,482	1.1%	109.9	9.6x	1.6x
Tannery	3,346	3,396	-49.59	-1.46%	6	34,577	0.7%	404.9	3.5%	NM	3.5x	ISLAMIBANK	51,198	1.0%	19.0	9.5x	0.8x
Jute	8,230	8,404	-174.32	-2.07%	3	1,865	0.0%	3.9	0.0%	NM	18.8x	BEACONPHAR	50,889	1.0%	21.2	50.4x	9.7x
Ceramics	667	663	+3.88	+0.59%	5	31,400	0.6%	37.6	0.3%	32.1x	2.0x	SUMITPOWER	41,647	0.8%	31.5	7.8x	1.1x
Miscellaneous	5,206	5,186	+19.98	+0.39%	14	266,596	5.4%	162.9	1.4%	19.1x	2.4x	POWERGRID	38,487	0.8%	55.3	11.6x	0.4x
												EBL	38,059	0.8%	12.5	7.0x	1.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SKICL	30.9	+10.0%	0.3	11.6x	1.7x
ACMEPL	19.3	+9.7%	0.3	11.8x	1.0x
KTL	35.8	+9.5%	227.5	35.7x	2.1x
AMANFEED	56.0	+8.1%	115.1	21.8x	1.7x
ONEBANKLTD	17.2	+6.8%	1,425.7	8.7x	0.9x
PTL	93.4	+6.7%	322.0	22.5x	3.4x
SIBL	17.1	+5.6%	120.2	10.2x	0.9x
AAMRANET	45.8	+5.4%	7.6	26.9x	1.3x
FUWANGFOOD	14.1	+5.2%	15.2	NM	1.2x
ALIF	15.6	+4.7%	122.8	35.3x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
REGENTTEX	9.6	-12.7%	10.5	NM	0.4x
ARAMITCEM	34.3	-9.7%	6.6	31.6x	1.2x
STYLECRAFT	97.5	-7.9%	22.6	NM	4.8x
NRBCBANK	32.8	-7.9%	531.6	12.8x	2.0x
MITHUNKNIT	10.7	-7.8%	2.2	NM	0.6x
YPL	9.8	-7.5%	2.4	NM	0.9x
BIFC	7.2	-6.5%	0.2	NM	NM
PREMIERBAN	16.4	-6.3%	266.8	4.8x	0.8x
SHURWID	13.6	-6.2%	12.8	6.2x	1.1x
MAKSONSPIN	24.5	-6.1%	62.2	9.0x	1.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	130,675	7.0%	11.7x	2.1x
BEXIMCO	106,871	5.7%	15.3x	2.1x
BATBC	90,668	4.8%	25.0x	8.5x
RENATA	68,670	3.7%	27.0x	5.2x
BXPHARMA	67,123	3.6%	17.4x	2.5x
GP	48,597	2.6%	13.4x	11.7x
BRACBANK	41,837	2.2%	13.6x	1.6x
BEACONPHAR	35,621	1.9%	50.4x	9.7x
LHBL	31,954	1.7%	22.9x	4.7x
EBL	26,573	1.4%	7.0x	1.2x
ISLAMIBANK	24,924	1.3%	9.5x	0.8x
IFIC	21,801	1.2%	16.7x	1.2x
CITYBANK	20,773	1.1%	6.9x	1.0x
ROBI	20,274	1.1%	88.7x	3.1x
PUBALIBANK	20,219	1.1%	5.5x	0.7x
OLYMPIC	19,417	1.0%	17.0x	3.3x
NBL	18,442	1.0%	7.3x	0.5x
ALARABANK	17,023	0.9%	10.6x	1.2x
DELTALIFE	16,881	0.9%	NM	NM
ORIONPHARM	16,537	0.9%	29.7x	1.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ONEBANKLTD	17.2	+6.8%	1,425.7	8.7x	0.9x
IFIC	20.3	-4.2%	683.7	16.7x	1.2x
NRBCBANK	32.8	-7.9%	531.6	12.8x	2.0x
FIRSTSBANK	14.5	-2.0%	465.7	5.2x	0.8x
FORTUNE	100.5	-3.8%	398.3	43.1x	6.8x
PTL	93.4	+6.7%	322.0	22.5x	3.4x
ORIONPHARM	103.9	-2.2%	314.2	29.7x	1.3x
DELTALIFE	215.3	-0.3%	306.0	NM	NM
PREMIERBAN	16.4	-6.3%	266.8	4.8x	0.8x
MERCANBANK	19.0	-5.0%	254.2	4.9x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ONEBANKLTD	17.1	16.1	10.0	11,030	188.51
SONALIPAPR	643.0	612.0	3.0	180	110.05
GENEXIL	166.6	166.6	1.0	471	78.44
EASTERNINS	114.5	114.5	1.0	481	55.10
PTL	87.1	78.8	9.0	536	45.70
RENATA	1,316.0	1,316.0	1.0	20	26.32
LHBL	85.5	85.5	1.0	300	25.65
BRACBANK	57.0	56.0	4.0	300	16.95
RELIANCE1	12.4	12.4	1.0	1,205	14.95
DELTALIFE	227.9	225.0	2.0	63	14.18

\*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
ONEBANKLTD	17.1	16.1	188.5	11,030	10
SONALIPAPR	643.0	612.0	110.1	180	3
GENEXIL	166.6	166.6	78.4	471	1
EASTERNINS	114.5	114.5	55.1	481	1
PTL	87.1	78.8	45.7	536	9
RENATA	1,316.0	1,316.0	26.3	20	1
LHBL	85.5	85.5	25.7	300	1
BRACBANK	57.0	56.0	17.0	300	4
RELIANCE1	12.4	12.4	14.9	1,205	1
DELTALIFE	227.9	225.0	14.2	63	2
NEWLINE	39.4	37.6	11.6	298	2
BBSCABLES	62.0	62.0	10.0	162	1
PHOENIXFIN	29.7	29.7	9.5	319	1
GREENDELMF	7.9	7.9	9.2	1,161	1
ASIAINS	88.0	88.0	7.6	86	1
BATBC	645.0	645.0	6.5	10	1
BARKAPOWER	24.2	23.8	6.0	250	3
AMANFEED	52.0	52.0	5.7	110	3
UNITEDFIN	24.9	24.9	5.6	225	1
ORIONPHARM	107.3	103.0	4.4	42	3
DSHGARME	120.5	120.5	3.9	32	1
FORTUNE	109.8	109.7	3.7	34	2
<b>Total</b>			<b>678.3</b>		<b>72</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Monno Ceramic Industries Ltd.	-	0.0%	10.0%	Record Date	23-Nov-21
Monno Agro & General Machinery Limited	-	0.0%	10.0%	Record Date	23-Nov-21
Samorita Hospital Limited	-	0.0%	10.0%	Record Date	23-Nov-21
Mozaffar Hossain Spinning Mills Ltd.	-	0.0%	3.0%	Record Date	23-Nov-21
Shasha Denims Limited	-	0.0%	10.0%	Record Date	23-Nov-21
Confidence Cement Ltd.	-	0.0%	25.0%	Record Date	23-Nov-21
National Tea Company Ltd.	-	0.0%	10.0%	Record Date	23-Nov-21
Tamijuddin Textile Mills Limited	-	0.0%	20.0%	Record Date	23-Nov-21
Monno Fabrics Limited	-	0.0%	0.0%	Record Date	23-Nov-21
LR Global Bangladesh Mutual Fund One	-	0.0%	15.1%	Record Date	23-Nov-21
Simtex Industries Limited	-	0.0%	4.0%	Record Date	24-Nov-21
Baraka Patenga Power Limited	-	0.0%	12.5%	Record Date	24-Nov-21
Aramit Limited	-	0.0%	50.0%	Record Date	24-Nov-21
Shepherd Industries Limited	-	2.5%	2.5%	Record Date	24-Nov-21
Baraka Power Limited	-	0.0%	10.0%	Record Date	24-Nov-21
Zaheen Spinning Limited	-	0.0%	0.0%	Record Date	24-Nov-21

**Important DSE News**
**NLTUBES**

The Board of Directors has recommended 2% cash dividend for the year ended on June 30, 2021. Date of AGM: 27.12.2021, Time: 3:00 PM, Venue: Digital Platform. Record date: 09.12.2021. The Company has reported EPS of Tk. 0.06, NAV per share of Tk. 153.12 and NOCFPS of Tk. 3.24 for the year ended on June 30, 2021 as against Tk. 0.06, Tk. 153.50 and Tk. (2.90) respectively for the same period of the previous year.

**(Q1 Un-audited):** EPS was Tk. (0.38) for July-September 2021 as against Tk. 0.06 for July-September 2020; NOCFPS was Tk. 0.31 for July-September 2021 as against Tk. 1.70 for July-September 2020. NAV per share was Tk. 152.73 as on September 30, 2021 and Tk. 153.12 as on June 30, 2021.

**REGENTTEX**

The Board of Directors has recommended No dividend for the year ended on June 30, 2021. Date of AGM: 30.12.2021, Time: 4:00 PM, Venue: Digital Platform. Record Date: 12.12.2021. The Company has also reported EPS of Tk. (1.62), NAV per share of Tk. 26.52 and NOCFPS of Tk. (0.41) for the year ended on June 30, 2021 as against Tk. (0.31), Tk. 28.46 and Tk. 0.62 respectively for the same period of the previous year.

**LOVELLO**

**(Q1 Un-audited):** EPS was Tk. 0.40 for July-September 2021 as against Tk. 0.37 for July-September 2020; NOCFPS was Tk. 0.71 for July-September 2021 as against Tk. (0.24) for July-September 2020. NAV per share was Tk. 12.97 as on September 30, 2021 and Tk. 13.12 as on September 30, 2020.

**GOLDENSON**

**(Q1 Un-audited):** Consolidated EPS was Tk. 0.18 for July-September 2021 as against Tk. (0.13) for July-September 2020; Consolidated NOCFPS was Tk. 0.14 for July-September 2021 as against Tk. 0.31 for July-September 2020. Consolidated NAV per share was Tk. 20.39 as on September 30, 2021 and Tk. 20.22 as on June 30, 2021.

**BANGAS**

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on November 25, 2021 at 3:30 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on September 30, 2021.

**LRGLOBMF1**

IDLC Finance Ltd., one of the Corporate Sponsors of the Fund, has further reported that it has completed its sale of 1,66,204 units of the Fund at prevailing market price through Stock Exchange (DSE) as per declaration disseminated on 15.11.2021.

**BEACHHATCH**

As per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on November 28, 2021 at 4:00 PM to consider, among others, audited financial statements of the Company for the year ended on June 30, 2021.

**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.

**SONARBAINS**

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on November 29, 2021 at 3:00 PM to consider, among others, un-audited financial statements of the Company for the Third Quarter (Q3) period ended on September 30, 2021.

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