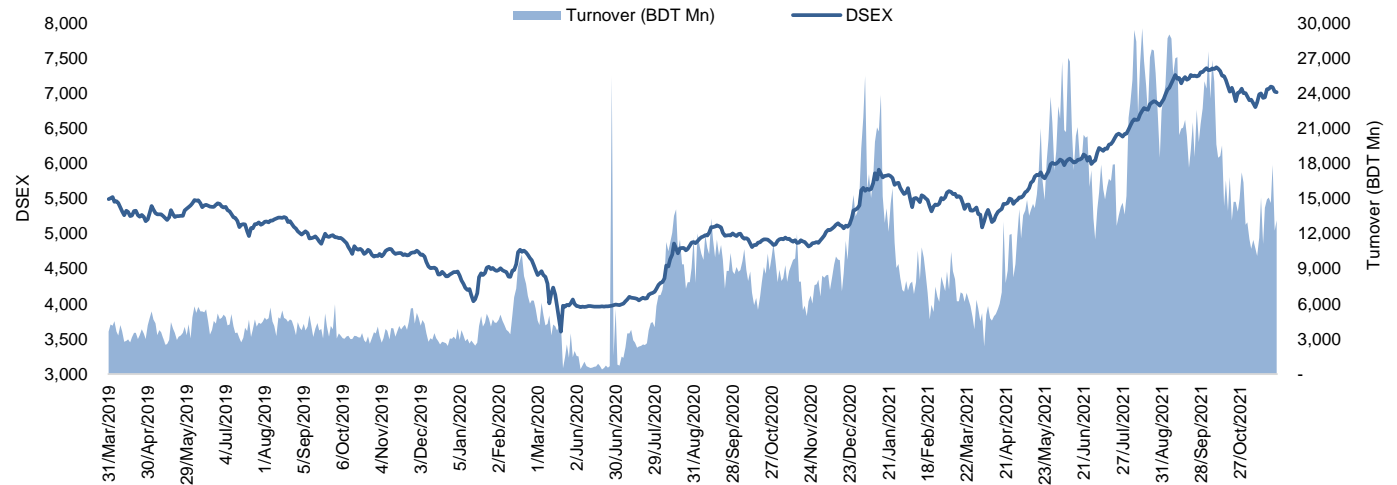


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.13%) lost 9.29 points and closed at 7,013.00. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.16%), and the large-cap index CDSET (-0.33%) closed at 2,660.86, 1,468.58, and 1,429.80 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.36% followed by Pharmaceutical (+0.20%), Food & Allied (+0.06%). Fuel & Power experienced the highest loss of 1.66% followed by NBFi (-1.37%), Bank (-0.68%), Engineering (-0.30%). Block trades contributed 0.4% of the overall market turnover. Bangladesh Export Import Company Ltd. (-0.6%) was the most traded share with a turnover of BDT 1,618 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	7,013.00	7,022.29	-9.29	-0.13%	+29.8%
DS30	2,660.86	2,666.99	-6.14	-0.23%	+35.5%
DSES	1,468.58	1,470.97	-2.39	-0.16%	+18.2%
CDSET	1,429.80	1,434.50	-4.70	-0.33%	+27.3%

	Advanced	Declined	Unchanged	Total
All Category	156	176	36	368
A Category (Equity)	114	132	26	272
B Category (Equity)	22	31	3	56
N Category (Equity)	9	2	1	12
Z Category (Equity)	11	11	6	28
Mutual Funds	1	21	13	35
Corporate Bonds	0	1	0	1

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,549,111	5,565,089	-0.3%
	Mn USD	65,130	65,318	
Turnover	Mn BDT	13,146	12,260	+7.2%
	Mn USD	154	144	
Volume	Mn Shares	399	452	-11.7%
No. of Trade		181,255	185,133	-2.1%

Figure: Sectorial Turnover (BDT)

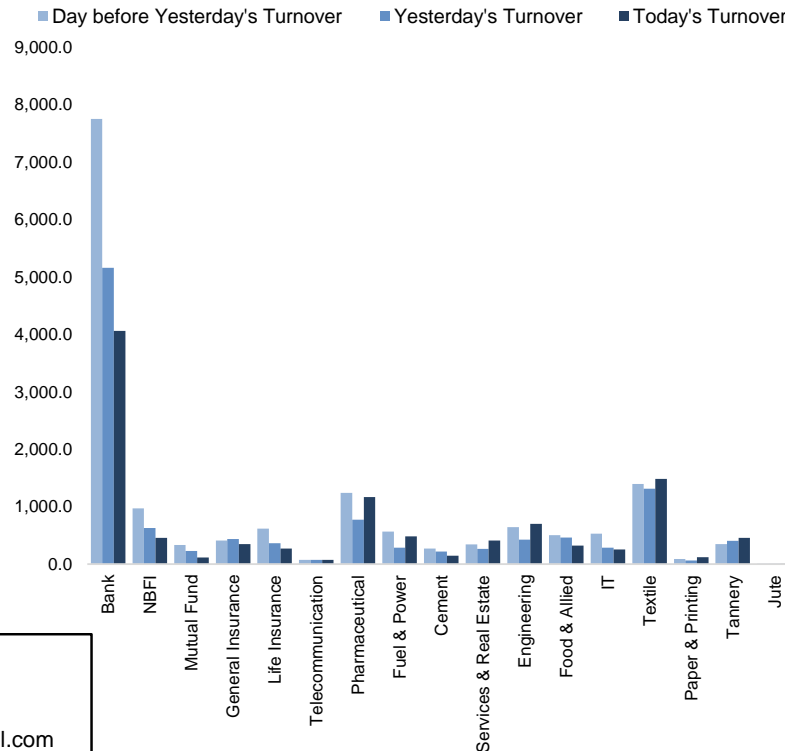
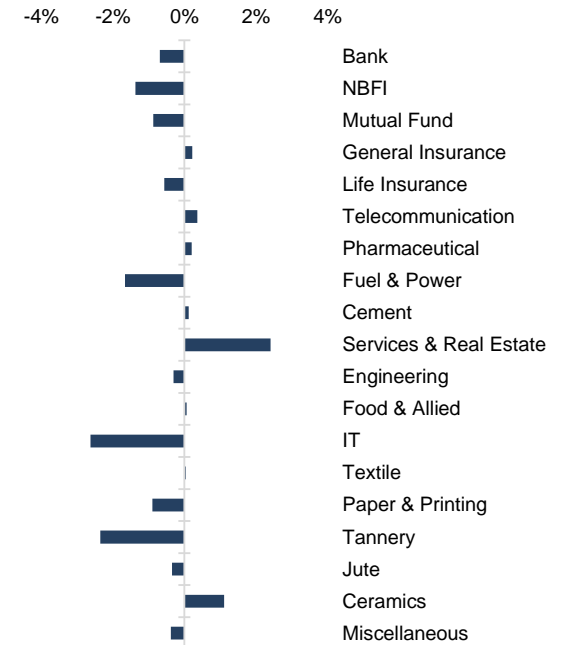


Figure: Sectorial Mcap Change



Market PE 17.2x
Market PB 2.0x

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

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

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	1,687	1,699	-11.59	-0.68%	32	779,421	15.8%	4,058.9	32.1%	8.6x	0.9x	GP	487,593	9.9%	16.0	13.4x	11.7x
NBFI	2,385	2,418	-33.10	-1.37%	23	230,095	4.7%	458.2	3.6%	21.8x	4.0x	WALTONHIL	346,247	7.0%	6.8	22.8x	3.8x
Mutual Fund	946	954	-8.26	-0.87%	37	43,883	0.9%	116.4	0.9%	NM	0.9x	BATBC	342,468	6.9%	138.6	24.9x	8.5x
General Insurance	5,022	5,011	+11.04	+0.22%	39	129,004	2.6%	350.2	2.8%	20.2x	2.2x	ROBI	204,803	4.1%	25.8	89.2x	3.1x
Life Insurance	2,783	2,798	-15.78	-0.56%	13	77,976	1.6%	268.3	2.1%	NM	NM	SQURPHARMA	197,945	4.0%	151.7	11.6x	2.1x
Telecommunication	6,215	6,192	+22.54	+0.36%	3	722,014	14.6%	72.6	0.6%	17.7x	6.2x	BEXIMCO	153,005	3.1%	1,617.8	15.2x	2.1x
Pharmaceutical	4,044	4,036	+8.22	+0.20%	32	732,511	14.8%	1,166.5	9.2%	19.4x	2.7x	UPGDCL	149,214	3.0%	55.5	13.7x	4.2x
Fuel & Power	1,804	1,835	-30.47	-1.66%	23	477,114	9.7%	482.9	3.8%	11.8x	1.2x	RENATA	139,898	2.8%	18.5	26.9x	5.2x
Cement	2,629	2,625	+3.12	+0.12%	7	134,717	2.7%	145.3	1.1%	18.7x	2.8x	BXPBARMA	98,412	2.0%	288.7	17.8x	2.6x
Services & Real Estate	1,399	1,366	+32.85	+2.41%	8	53,912	1.1%	408.2	3.2%	NM	1.1x	ICB	95,650	1.9%	10.5	67.7x	2.1x
Engineering	4,782	4,797	-14.35	-0.30%	42	560,725	11.3%	698.5	5.5%	18.6x	2.1x	LHBL	90,123	1.8%	134.2	22.8x	4.7x
Food & Allied	25,039	25,023	+15.86	+0.06%	20	441,846	8.9%	320.7	2.5%	30.2x	8.9x	BERGERPBL	82,010	1.7%	8.0	26.3x	6.8x
IT	3,415	3,507	-92.10	-2.63%	11	42,516	0.9%	253.1	2.0%	36.4x	3.0x	BRACBANK	75,734	1.5%	174.7	13.2x	1.5x
Textile	1,567	1,566	+0.53	+0.03%	58	163,253	3.3%	1,483.3	11.7%	35.1x	1.0x	MARICO	72,456	1.5%	4.6	22.0x	30.8x
Paper & Printing	7,050	7,114	-63.43	-0.89%	6	21,377	0.4%	121.1	1.0%	NM	1.5x	DUTCHBANGL	54,648	1.1%	122.7	9.3x	1.5x
Tannery	3,024	3,097	-72.90	-2.35%	6	33,764	0.7%	459.1	3.6%	NM	3.4x	ISLAMIBANK	51,359	1.0%	14.1	9.6x	0.8x
Jute	7,673	7,699	-26.27	-0.34%	3	1,858	0.0%	4.0	0.0%	NM	18.7x	BEACONPHAR	51,305	1.0%	10.9	50.8x	9.8x
Ceramics	709	701	+7.77	+1.11%	5	31,748	0.6%	68.8	0.5%	32.5x	2.0x	SUMITPOWER	41,968	0.8%	23.8	7.9x	1.1x
Miscellaneous	5,133	5,153	-19.59	-0.38%	14	265,582	5.4%	1,724.4	13.6%	19.1x	2.4x	POWERGRID	39,271	0.8%	97.2	11.8x	0.4x
												EBL	37,391	0.8%	15.2	6.9x	1.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TOSRIFA	18.8	+10.1%	17.1	27.7x	0.7x
EMERALDOIL	34.2	+10.0%	12.8	NM	2.2x
ACMEPL	21.2	+9.8%	0.6	13.0x	1.1x
SKICL	33.9	+9.7%	0.5	12.7x	1.9x
ONEBANKLTD	18.7	+8.7%	1,030.8	9.5x	1.0x
GOLDENSON	22.5	+8.7%	162.4	36.9x	1.1x
PDL	12.3	+7.0%	35.6	95.3x	0.9x
MITHUNKNIT	11.4	+6.5%	1.2	NM	0.6x
ARAMITCEM	36.5	+6.4%	5.4	33.6x	1.3x
SILCOPHL	25.5	+6.3%	7.5	31.6x	1.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NAVANACNG	30.8	-6.9%	6.3	NM	0.9x
DOMINAGE	25.1	-6.7%	25.5	33.9x	1.5x
PROVATIINS	124.7	-6.5%	7.5	28.8x	5.9x
RAHIMTEXT	242.3	-6.1%	0.6	NM	6.3x
UPGDCL	257.4	-5.5%	55.5	13.7x	4.2x
ALLTEX	16.0	-5.3%	1.5	NM	3.5x
GENEXIL	162.4	-5.2%	194.2	48.1x	9.1x
SIBL	16.3	-4.7%	108.3	9.7x	0.9x
STYLECRAFT	93.2	-4.4%	10.3	NM	4.6x
SAVAREFR	161.4	-4.4%	0.2	NM	264.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	129,515	6.9%	11.6x	2.1x
BEXIMCO	106,262	5.7%	15.2x	2.1x
BATBC	90,583	4.8%	24.9x	8.5x
BXPBARMA	68,711	3.7%	17.8x	2.6x
RENATA	68,298	3.6%	26.9x	5.2x
GP	48,759	2.6%	13.4x	11.7x
BRACBANK	40,715	2.2%	13.2x	1.5x
BEACONPHAR	35,912	1.9%	50.8x	9.8x
LHBL	31,831	1.7%	22.8x	4.7x
EBL	26,107	1.4%	6.9x	1.2x
ISLAMIBANK	25,002	1.3%	9.6x	0.8x
IFIC	21,693	1.2%	16.6x	1.2x
CITYBANK	20,988	1.1%	7.0x	1.0x
ROBI	20,378	1.1%	89.2x	3.1x
PUBALIBANK	19,937	1.1%	5.5x	0.7x
OLYMPIC	19,672	1.0%	17.3x	3.4x
NBL	18,442	1.0%	7.3x	0.5x
ALARABANK	16,838	0.9%	10.5x	1.2x
DELTALIFE	16,615	0.9%	NM	NM
ORIONPHARM	16,219	0.9%	29.2x	1.3x

*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	174.6	-0.6%	1,617.8	15.2x	2.1x
ONEBANKLTD	18.7	+8.7%	1,030.8	9.5x	1.0x
FIRSTSBANK	14.8	+2.1%	567.3	5.3x	0.8x
FORTUNE	97.0	-3.5%	455.8	41.6x	6.6x
KTL	37.5	+4.7%	412.0	79.6x	2.2x
IFIC	20.2	-0.5%	407.2	16.6x	1.2x
PTL	95.5	+2.2%	392.3	23.0x	3.5x
BXPBARMA	220.6	+2.4%	288.7	17.8x	2.6x
SAIFPOWER	43.3	+4.3%	233.6	24.2x	2.6x
ORIONPHARM	101.9	-1.9%	214.9	29.2x	1.3x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BXPBARMA	216.8	196.7	2.0	973	195.76
BEXIMCO	184.4	175.0	2.0	528	92.72
PENINSULA	36.0	33.0	7.0	1,195	40.82
ONEBANKLTD	18.4	17.0	4.0	1,375	25.07
NEWLINE	39.3	39.3	1.0	610	23.97
BNICL	121.0	121.0	1.0	122	14.71
BRACBANK	60.0	54.4	4.0	250	13.99
KTL	41.0	41.0	1.0	300	12.30
DELTALIFE	224.9	218.0	2.0	52	11.67
PROVATIINS	133.4	133.4	2.0	80	10.67

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BXPHERMA	216.8	196.7	195.8	973	2
BEXIMCO	184.4	175.0	92.7	528	2
PENINSULA	36.0	33.0	40.8	1,195	7
ONEBANKLTD	18.4	17.0	25.1	1,375	4
NEWLINE	39.3	39.3	24.0	610	1
BNICL	121.0	121.0	14.7	122	1
BRACBANK	60.0	54.4	14.0	250	4
KTL	41.0	41.0	12.3	300	1
DELTALIFE	224.9	218.0	11.7	52	2
PROVATIINS	133.4	133.4	10.7	80	2
FORTUNE	110.3	107.0	10.3	96	4
AMANFEED	55.8	55.8	5.6	100	1
NRBCBANK	35.8	35.2	3.7	105	3
HFL	30.8	30.8	3.5	113	3
SINGERBD	170.9	170.9	3.4	20	1
BARKAPOWER	26.0	26.0	2.6	100	1
SONALIPAPR	635.0	635.0	2.5	4	2
EASTERNINS	125.0	125.0	2.4	20	2
FBFIF	6.0	6.0	2.2	362	1
PRIMEBANK	24.7	24.7	2.1	86	1
SAIFPOWER	42.5	42.5	2.1	49	1
MAKSONSPIN	26.9	26.9	1.1	40	1
Total			485.7		50

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Standard Ceramic Industries Ltd.	-	0.0%	1.0%	Record Date	24-Nov-21
Aramit Cement Limited	-	0.0%	0.0%	Record Date	24-Nov-21
Meghna Condensed Milk Industries Ltd.	-	0.0%	0.0%	Record Date	24-Nov-21
Meghna Pet Industries Ltd.	-	0.0%	0.0%	Record Date	24-Nov-21
Stylecraft Limited	-	0.0%	0.0%	Record Date	24-Nov-21
Usmania Glass Sheet Factory Limited	-	0.0%	0.0%	Record Date	24-Nov-21
CVO Petrochemical Refinery Limited	-	10.0%	0.0%	Record Date	25-Nov-21
Queen South Textile Mills Limited	-	0.0%	10.0%	Record Date	25-Nov-21
SK Trims & Industries Limited	-	0.0%	5.0%	Record Date	25-Nov-21
Far Chemical Industries Limited	-	0.0%	1.0%	Record Date	25-Nov-21

Important DSE News
DOMINAGE

(Q1 Un-audited): EPS was Tk. 0.15 for July-September 2021 as against Tk. 0.52 for July-September 2020; NOCFPS was Tk. 0.82 for July-September 2021 as against Tk. 1.13 for July-September 2020. NAV per share was Tk. 17.19 as on September 30, 2021 and Tk. 17.04 as on June 30, 2021.

KTL

The Board of Directors has recommended 10% cash for general shareholders excluding Sponsors & Directors for the year ended on June 30, 2021. The Sponsors & Directors hold 3,52,60,499 shares out of total 11,63,05,200 shares of the Company and the cash dividend to be payable to the General shareholders is Tk. 8,10,44,701. Date of AGM: 30.12.2021, Time: 11:00 AM, Venue: Digital Platform. Record date: 13.12.2021. The Company has also reported EPS of Tk. 0.52, NAV per share of Tk. 16.71 and NOCFPS of Tk. 0.19 for the year ended on June 30, 2021 as against Tk. 1.43, Tk. 17.63 and Tk. 1.70 respectively for the same period of the previous year.

Time Extension of IPO fund Utilization: The Board of Directors of the Company has decided to applied Bangladesh Securities and Exchange Commission as time extension of IPO fund Utilization and approval will be sought from shareholder at the 18th AGM.

(Q1 Un-audited): EPS was Tk. 0.47 for July-September 2021 as against Tk. 0.36 for July-September 2020; NOCFPS was Tk. (0.77) for July-September 2021 as against Tk. 0.05 for July-September 2020. NAV per share was Tk. 17.17 as on September 30, 2021 and Tk. 16.71 as on June 30, 2021. The Company also informed that EPS is increased compared to the previous year due to huge efficiency at cost of goods sold and operating costs.

AMBEEPHEA

(Q1 Un-audited): EPS was Tk. 0.10 for July-September 2021 as against Tk. 0.15 for July-September 2020; NOCFPS was Tk. 8.37 for July-September 2021 as against Tk. 0.68 for July-September 2020. NAV per share was Tk. 18.79 as on September 30, 2021 and Tk. 18.68 as on June 30, 2021.

BEXIMCO

Beximco Holdings Ltd., one of the Corporate Directors of the Company, has expressed its intention to buy 3,00,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE) within next 30 working days.

CAPMIBBLMF

Islami Bank Bangladesh Limited, one of the Corporate Sponsors of the Fund, has further reported that it has completed its sale of 10,00,000 units of the Fund at prevailing market price through Stock Exchange (DSE) as per declaration disseminated on 02.11.2021.

Islami Bank Bangladesh Limited, one of the Corporate Sponsors of the Fund, has expressed its intention to sell 10,00,000 units out of its total holding of 4,85,00,000 units of the Fund at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

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BSRMSTEEL

H. Akberali & Co. Limited, one of the Corporate Directors of BSRM Steels Limited, has expressed its intention to buy 3,00,000 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.

GENEXIL

Alpha Credit Rating Limited (AlphaRating) has rated the Company as "A+" in the long term and "ST-2" in the short term along with a stable outlook based on audited financial statements of the Company as on June 30, 2020 and relevant qualitative information till November 21, 2021.

The Company has informed that the Board of Directors has signed an Agreement with "Reliance Bangladesh LNG & Power Limited". Under this agreement the Company will deliver, implementation and maintenance support of Microsoft Dynamics 365 ERP Solution through Business Central. In this engagement the Company is going to give service for 2 years to implement & maintain Microsoft Dynamics 365 ERP Solution. In this Contract, and expected to generate approximately revenue of Tk. 2.10 crore.

OLYMPIC

The Company has informed that the Board of Directors has taken following decisions: 1) To undertake land development of and to construct Boundary Wall, Main Gate, Security Guards Room and Internal Road on newly purchased land at Lolati at an estimated total cost of Tk. 9,00,00,000.00 which includes Designing charges and Contingencies of around total Tk. 33,62,000.00. 2) To undertake First Phase extension works at an estimated total cost of Tk. 8,50,00,000.00 to construct a 5-storey building with 14,600 sft. area in each floor i.e. total 73,000 sft. floor area and to undertake extension of 7,300 sft. area Tin Shed on Ground Floor for Carton and Snacks Units at Kutubpur to meet the shortage of storage space to keep raw materials, packing materials and finished goods as-well-as for storage of Craft Paper and Finished Cartons. 3) Enhancement of production capacity of Corrugated Carton Unit at Kutubpur from 6-6.50 million Cartons to approx. 8.00 million Cartons per month by importing one set each of Bailing Press, High Speed Printer Slotter and Fork Lift from China. The estimated investment requirement for these works will be total Tk. 1,66,50,000.00 which will be met based on time of requirement. 4) To import Cup Cake Making Line for production of Plain Cake (capacity 475.20 lac pieces per annum) and Custard Cake (capacity 316.80 lac pieces per annum) alongwith Packing Line, Nitrogen Generator, Metal Detector and other items from China, at an estimated total cost of Tk. 5,47,20,000.00 and local cost of around Tk. 1,01,80,000.00 including costs of making Clean Room, procurement of various Utility items, Contingencies, etc.

SSSTEEL

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 24, 2021 at 6:30 PM to consider, among others, audited financial statements of the Company for the year ended on June 30, 2021.

ACTIVEFINE

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 28, 2021 at 3:00 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on September 30, 2021.

AFCAGRO

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 28, 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.

TUNGHAI

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 30, 2021 at 3:30 PM to consider, among others, audited financial statements of the Company for the year ended on June 30, 2017, 2018, 2019, 2020 and 2021.

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