

Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.37%) lost 96.85 points and closed at 6,952.14. The blue-chip index DS30 (-1.48%), the Shariah-based index DSES (-0.88%), and the large-cap index CDSET (-1.48%) closed at 2,621.05, 1,467.07, and 1,406.67 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.60% followed by Bank (-1.71%), Fuel & Power (-1.07%), Engineering (-0.95%), Pharmaceutical (-0.78%), Food & Allied (-0.45%), and Telecommunication (-0.42%), respectively. Block trades contributed 0.4% of the overall market turnover. Bangladesh Export Import Company Ltd. (-4.3%) was the most traded share with a turnover of BDT 964 million.

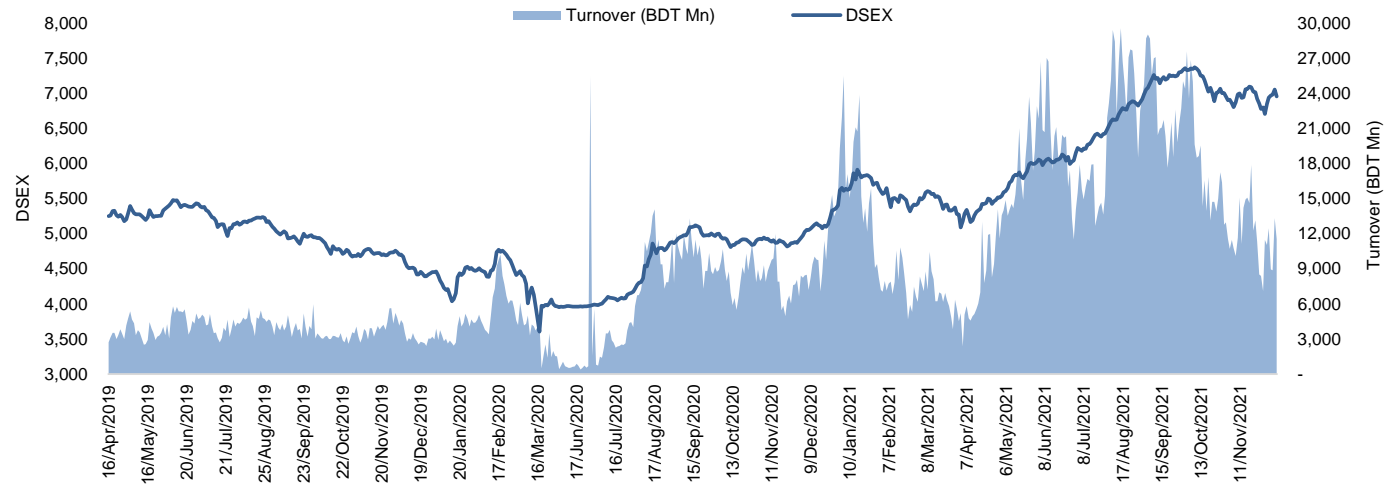


Figure: Sectorial Turnover (BDT)

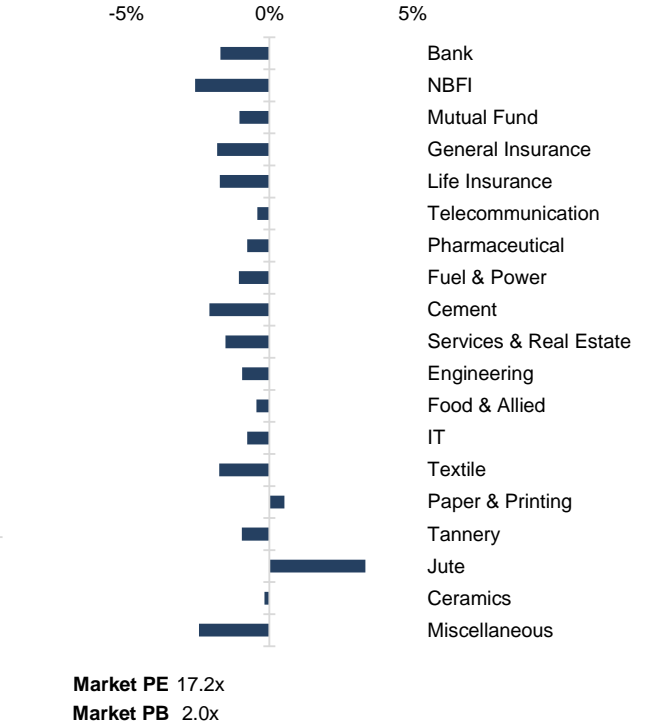
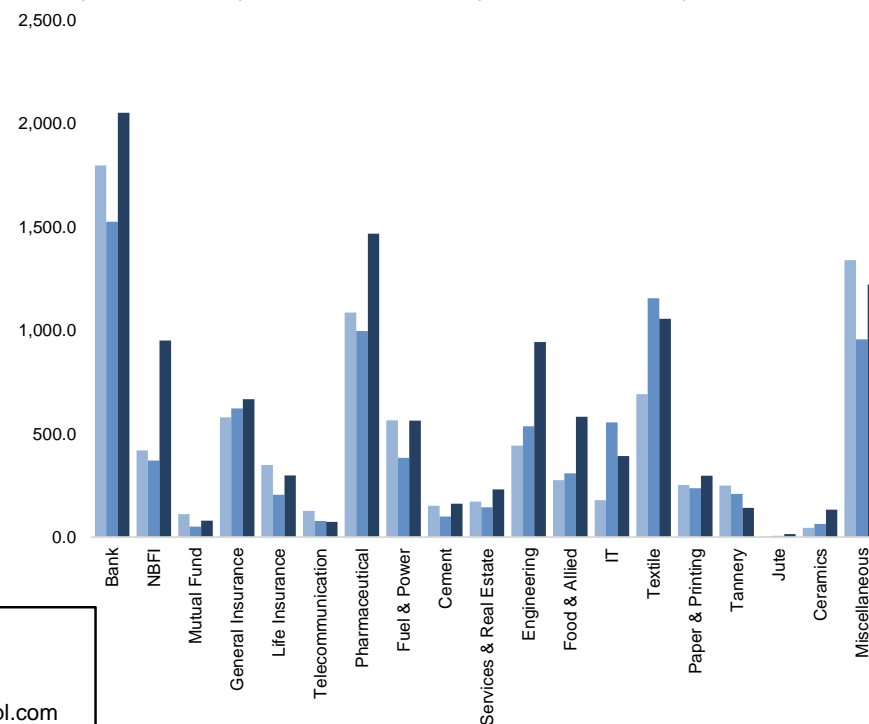
Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,952.14	7,048.99	-96.85	-1.37%	+28.7%
DS30	2,621.05	2,660.30	-39.26	-1.48%	+33.5%
DSES	1,467.07	1,480.07	-13.00	-0.88%	+18.1%
CDSET	1,406.67	1,427.86	-21.19	-1.48%	+25.3%

	Advanced	Declined	Unchanged	Total
All Category	97	257	20	374
A Category (Equity)	55	208	13	276
B Category (Equity)	29	23	4	56
N Category (Equity)	0	12	0	12
Z Category (Equity)	13	14	3	30
Mutual Funds	4	28	4	36
Corporate Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,547,842	5,606,574	-1.0%
	Mn USD	64,660	65,345	
Turnover	Mn BDT	11,524	13,310	-13.4%
	Mn USD	134	155	
Volume	Mn Shares	348	383	-9.4%
No. of Trade		256,736	220,617	+16.4%

Figure: Sectorial Turnover (BDT)



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	1,622	1,651	-28.30	-1.71%	32	750,124	15.2%	2,051.5	18.1%	8.3x	0.9x	GP	485,838	9.8%	12.5	13.4x	11.7x
NBFI	2,417	2,482	-64.50	-2.60%	23	234,606	4.7%	950.8	8.4%	22.2x	4.2x	WALTONHIL	353,578	7.2%	4.2	23.2x	3.8x
Mutual Fund	909	919	-9.62	-1.05%	37	42,369	0.9%	79.5	0.7%	NM	0.8x	BATBC	346,032	7.0%	94.9	25.2x	8.6x
General Insurance	4,679	4,766	-86.98	-1.82%	39	128,148	2.6%	666.1	5.9%	20.1x	2.2x	ROBI	203,232	4.1%	24.2	88.5x	3.1x
Life Insurance	2,648	2,695	-46.69	-1.73%	13	76,261	1.5%	297.9	2.6%	NM	NM	SQURPHARMA	194,133	3.9%	71.7	11.4x	2.0x
Telecommunication	6,002	6,027	-25.11	-0.42%	3	719,742	14.6%	73.8	0.7%	17.7x	6.2x	UPGDCL	148,402	3.0%	23.3	13.7x	4.2x
Pharmaceutical	3,979	4,010	-31.11	-0.78%	32	731,195	14.8%	1,467.1	13.0%	19.4x	2.7x	BEXIMCO	142,665	2.9%	963.8	14.2x	2.0x
Fuel & Power	1,870	1,890	-20.13	-1.07%	23	487,354	9.9%	563.3	5.0%	12.1x	1.2x	RENATA	141,377	2.9%	57.4	27.2x	5.2x
Cement	2,603	2,658	-55.60	-2.09%	7	136,060	2.8%	160.7	1.4%	18.9x	2.8x	ICB	98,551	2.0%	9.7	69.8x	2.2x
Services & Real Estate	1,351	1,372	-21.01	-1.53%	8	53,730	1.1%	230.5	2.0%	NM	1.1x	BXPHERMA	92,345	1.9%	131.0	16.7x	2.4x
Engineering	4,791	4,837	-46.11	-0.95%	42	574,596	11.6%	943.5	8.3%	19.1x	2.1x	LHBL	90,471	1.8%	134.3	22.9x	4.7x
Food & Allied	24,936	25,049	-113.66	-0.45%	20	448,394	9.1%	582.0	5.1%	30.7x	9.0x	BERGERPBL	82,330	1.7%	1.5	26.5x	6.9x
IT	3,396	3,423	-26.59	-0.78%	11	43,774	0.9%	392.1	3.5%	37.5x	3.1x	BRACBANK	76,848	1.6%	147.0	13.4x	1.6x
Textile	1,562	1,590	-27.83	-1.75%	58	167,125	3.4%	1,055.7	9.3%	36.3x	1.1x	MARICO	72,878	1.5%	1.4	22.1x	31.0x
Paper & Printing	7,233	7,196	+37.74	+0.52%	6	22,852	0.5%	296.6	2.6%	NM	1.6x	BEACONPHAR	53,061	1.1%	117.5	61.4x	9.9x
Tannery	2,994	3,023	-28.93	-0.96%	6	33,292	0.7%	141.9	1.3%	NM	3.3x	ISLAMIBANK	51,520	1.0%	17.0	9.6x	0.8x
Jute	8,216	7,950	+266.49	+3.35%	3	2,037	0.0%	14.7	0.1%	NM	20.5x	DUTCHBANGL	51,169	1.0%	62.7	8.7x	1.4x
Ceramics	700	701	-1.19	-0.17%	5	32,418	0.7%	132.2	1.2%	33.2x	2.1x	SUMITPOWER	43,463	0.9%	14.9	8.2x	1.1x
Miscellaneous	4,856	4,979	-122.59	-2.46%	14	257,999	5.2%	1,220.1	10.8%	18.4x	2.3x	POWERGRID	43,263	0.9%	205.0	13.0x	0.5x
												TITASGAS	37,294	0.8%	27.9	10.8x	0.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FINEFOODS	50.1	+9.9%	17.9	NM	4.7x
FUWANGFOOD	18.2	+9.6%	127.3	NM	1.5x
SHURWID	19.7	+9.4%	65.6	9.0x	1.5x
FASFIN	8.2	+9.3%	35.6	NM	NM
DSHGARME	167.7	+8.7%	17.9	NM	8.3x
MEGHNAPE	22.7	+8.6%	2.6	NM	NM
CENTRALPHL	15.1	+7.9%	33.0	NM	2.3x
PHARMAID	559.1	+7.5%	48.1	32.4x	5.7x
BEACHHATCH	31.6	+7.5%	46.5	NM	3.3x
AMBEEPHA	436.7	+7.5%	5.9	NM	23.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DULAMIACOT	50.2	-7.4%	0.7	NM	NM
ARAMITCEM	32.6	-5.8%	5.3	72.4x	1.2x
AAMRANET	49.4	-5.7%	48.5	29.1x	1.4x
ONEBANKLTD	18.5	-5.6%	309.0	9.4x	1.0x
SKICL	82.7	-5.1%	288.4	31.1x	4.5x
PHOENIXFIN	26.7	-5.0%	8.5	20.2x	1.2x
PROVATIINS	111.9	-4.8%	15.9	25.8x	5.3x
HFL	25.6	-4.8%	29.8	NM	0.7x
MALEKSPIN	30.1	-4.7%	62.0	7.9x	0.6x
FIRSTSBANK	14.2	-4.7%	256.2	5.0x	0.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	127,021	6.8%	11.4x	2.0x
BEXIMCO	99,081	5.3%	14.2x	2.0x
BATBC	91,525	4.9%	25.2x	8.6x
RENATA	69,020	3.7%	27.2x	5.2x
BXPHERMA	64,475	3.5%	16.7x	2.4x
GP	48,584	2.6%	13.4x	11.7x
BRACBANK	41,313	2.2%	13.4x	1.6x
BEACONPHAR	37,141	2.0%	61.4x	9.9x
LHBL	31,954	1.7%	22.9x	4.7x
EBL	25,641	1.4%	6.8x	1.2x
ISLAMIBANK	25,081	1.3%	9.6x	0.8x
ROBI	20,222	1.1%	88.5x	3.1x
OLYMPIC	19,939	1.1%	17.5x	3.4x
CITYBANK	19,770	1.1%	6.6x	0.9x
IFIC	19,760	1.1%	15.1x	1.0x
PUBALIBANK	19,303	1.0%	5.3x	0.7x
NBL	17,776	1.0%	7.0x	0.5x
ALARABANK	16,466	0.9%	10.2x	1.2x
ORIONPHARM	16,171	0.9%	29.1x	1.3x
SUMITPOWER	15,990	0.9%	8.2x	1.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	162.8	-4.3%	963.8	14.2x	2.0x
IFIC	18.4	-4.2%	440.0	15.1x	1.0x
GSPFINANCE	26.6	-0.4%	367.3	14.9x	1.3x
ONEBANKLTD	18.5	-5.6%	309.0	9.4x	1.0x
SKICL	82.7	-5.1%	288.4	31.1x	4.5x
FIRSTSBANK	14.2	-4.7%	256.2	5.0x	0.8x
SONALIPAPR	652.6	+2.1%	251.5	85.4x	2.2x
DELTALIFE	200.0	-1.5%	235.7	NM	NM
POWERGRID	60.7	-1.0%	205.0	13.0x	0.5x
ACTIVEFINE	26.6	-1.1%	191.9	68.2x	1.2x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RENATA	1,325.0	1,325.0	3.0	61	80.56
BATASHOE	870.0	870.0	1.0	25	21.75
SQURPHARMA	222.0	220.0	2.0	86	19.09
BRACBANK	59.0	56.0	3.0	232	13.65
POWERGRID	64.8	64.8	1.0	200	12.96
LHBL	87.0	72.1	4.0	117	8.84
KDSALTD	72.0	61.5	2.0	104	6.47
AMANFEED	62.0	62.0	1.0	89	5.52
PHOENIXFIN	28.9	28.9	1.0	190	5.49
AL-HAJTEX	71.8	69.0	5.0	66	4.71

*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
RENATA	1,325.0	1,325.0	80.6	61	3
BATASHOE	870.0	870.0	21.8	25	1
SQRPHARMA	222.0	220.0	19.1	86	2
BRACBANK	59.0	56.0	13.7	232	3
POWERGRID	64.8	64.8	13.0	200	1
LHBL	87.0	72.1	8.8	117	4
KDSALTD	72.0	61.5	6.5	104	2
AMANFEED	62.0	62.0	5.5	89	1
PHOENIXFIN	28.9	28.9	5.5	190	1
AL-HAJTEX	71.8	69.0	4.7	66	5
KPCL	31.4	31.4	4.1	130	1
KTL	38.0	38.0	3.3	87	3
ORIONINFU	99.9	99.9	3.0	30	1
GPHISPAT	51.0	51.0	2.8	54	1
SKICL	95.0	95.0	1.9	20	1
ONEBANKLTD	19.4	19.4	1.8	94	1
CONFIDCEM	127.0	114.0	1.2	10	2
BEACONPHAR	228.0	228.0	1.1	5	1
SAIFPOWER	42.5	42.5	1.1	25	1
RDFOOD	50.0	50.0	0.8	16	1
ACMELAB	87.0	87.0	0.8	9	1
SAFKOSPINN	24.1	24.1	0.7	27	1
Total			203.9		42

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
National Tubes Limited	-	0.0%	2.0%	Record Date	9-Dec-21
Fu-Wang Ceramic Industries Ltd.	-	0.0%	2.0%	Record Date	12-Dec-21
Regent Textile Mills Limited	-	0.0%	0.0%	Record Date	12-Dec-21
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
Dominage Steel Building Systems Limited	-	5.0%	5.0%	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
WATACHEM

(Q1 Un-audited): EPS was Tk. 1.01 for July-September, 2021 as against Tk. 2.08 for July-September, 2020. NOCFPS was Tk. 5.36 for July-September, 2021 as against Tk. 4.33 for July-September, 2020. NAV per share was Tk. 61.22 as on September 30, 2021 and Tk. 60.22 as on June 30, 2021. The Company has also informed that in the crisis of Covid-19 pandemic 2nd wave, EPS of the first quarter of 2021-2022 has been comparatively lower than EPS of the first quarter of 2020-2021.

PHOENIXFIN

(Q3 Un-audited): EPS was Tk. 0.10 for July-September 2021 as against Tk. 0.24 for July-September 2020; EPS was Tk. 0.73 for January-September 2021 as against Tk. 0.77 for January-September 2020. NOCFPS was Tk. 0.77 for January-September 2021 as against Tk. 0.95 for January-September 2020. NAV per share was Tk. 22.73 as on September 30, 2021 and Tk. 22.01 as on December 31, 2020.

POPULARLIF

National Credit Ratings Limited (NCR) has announced the Surveillance entity rating of the Company as "AAA" in the long term and "ST-1" in the short term along with a developing outlook based on audited financial statements of the Company of December 31, 2020.

ACTIVEFINE

National Credit Ratings Limited (NCR) has announced the surveillance rating of the Company as "A" in the long term and "ST-3" in the short term along with a developing outlook based on audited financial statements of June 30, 2021.

AFCAGRO

National Credit Ratings Limited (NCR) has announced the surveillance rating of the Company as "A" in the long term and "ST-3" in the short term along with a developing outlook based on audited financial statements of June 30, 2021.

BSC

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 December 23, 2021 at 2:35 PM to consider, among others, audited financial statements of the Company for the year ended on June 30, 2021.

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 December 23, 2021 at 2:35 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on September 30, 2021.

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