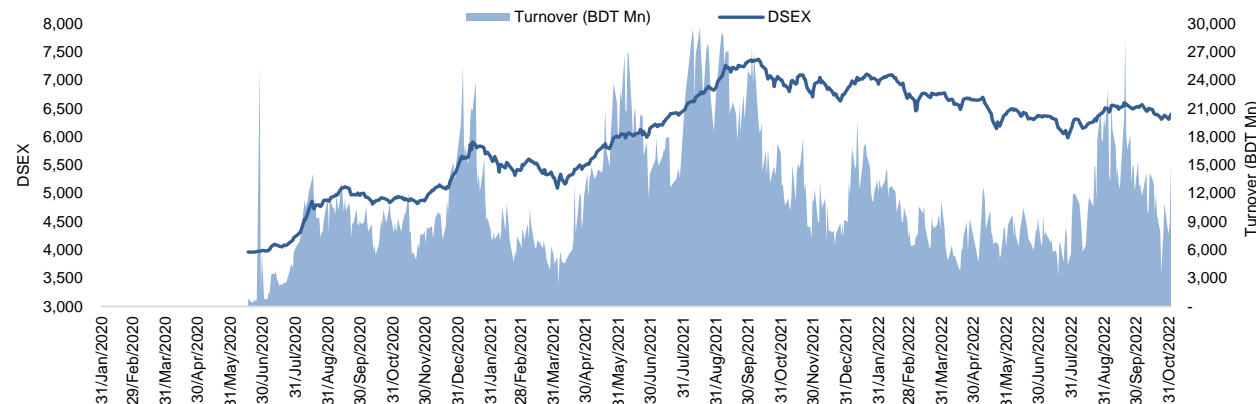


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.15%) gained 9.43 points and closed at 6,245.38. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (+0.06%) closed at 2,216.13, 1,370.32, and 1,223.85 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.18% followed by Bank (+0.16%), Fuel & Power (+0.06%), Engineering (+0.03%). Pharmaceutical experienced the highest loss of 0.01% followed by Telecommunication (0.00%), NBF1 (0.00%). Block trades contributed 8.0% of the overall market turnover. Bashundhara Paper Mills Limited (+7.6%) was the most traded share with a turnover of BDT 246 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,245.38	6,235.95	+9.43	+0.15%	-7.6%
DS30	2,216.13	2,214.33	+1.80	+0.08%	-12.5%
DSES	1,370.32	1,370.18	+0.13	+0.01%	-4.2%
CDSET	1,223.85	1,223.16	+0.69	+0.06%	-10.0%

	Advanced	Declined	Unchanged	Total
All Category	62	23	234	319
A Category (Equity)	52	14	158	224
B Category (Equity)	7	6	60	73
N Category (Equity)	3	1	4	8
Z Category (Equity)	0	2	12	14
Mutual Funds	0	0	20	20
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,637,473	7,642,411	-0.1%
	Mn USD	74,658	74,706	
Turnover	Mn BDT	4,848	4,494	+7.9%
	Mn USD	47	44	
Volume	Mn Shares	71	68	+3.2%
	No. of Trade	100,659	94,512	+6.5%

* Average Interbank Exchange Rate is BDT 102.30 as of Nov 30, 2022

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Figure: Sectorial Turnover (BDT)

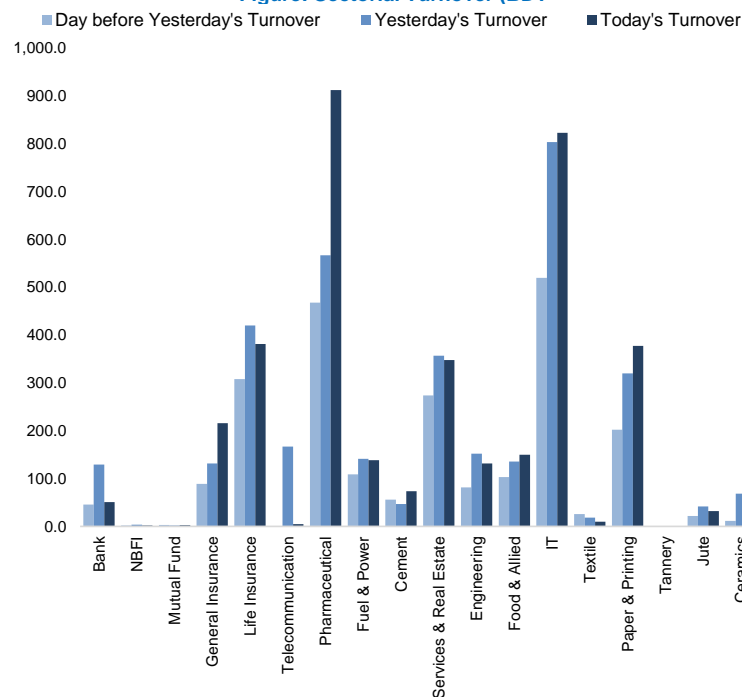
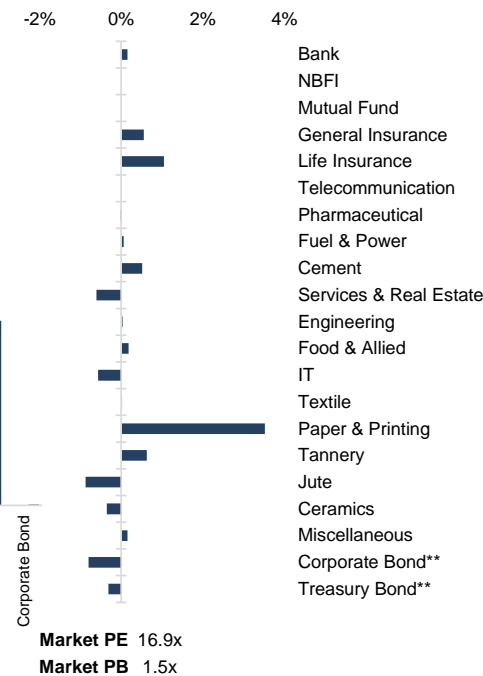


Figure: Sectorial Mcap Change



Market PE 16.9x

Market PB 1.5x

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	1,428	1,426	+2.25	+0.16%	34	667,224	8.7%	51.0	1.3%	7.7x	0.7x	GP	386,996	8.6%	1.2	11.2x	9.1x
NBFI	1,921	1,921	-	-	23	187,451	2.5%	1.9	0.0%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	2.6	0.1%	NM	0.8x	BATBC	280,098	6.2%	0.6	16.8x	6.7x
General Insurance	3,214	3,196	+17.84	+0.56%	41	93,211	1.2%	215.9	5.3%	15.8x	1.5x	SQURPHARMA	185,977	4.1%	79.6	10.0x	1.7x
Life Insurance	2,535	2,508	+26.32	+1.05%	14	71,086	0.9%	381.2	9.3%	NM	NM	ROBI	157,138	3.5%	3.5	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	4.8	0.1%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,788	3,789	-0.43	-0.01%	33	725,793	9.5%	911.8	22.3%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,700	1,699	+1.07	+0.06%	23	448,193	5.9%	138.4	3.4%	14.4x	1.1x	BEXIMCO	101,302	2.3%	96.3	8.2x	1.2x
Cement	2,362	2,350	+12.09	+0.51%	7	113,436	1.5%	73.5	1.8%	34.1x	2.5x	BERGERPBL	79,404	1.8%	4.6	25.8x	6.9x
Services & Real Estate	1,801	1,812	-10.94	-0.60%	8	71,158	0.9%	347.7	8.5%	40.3x	0.9x	LHBL	77,231	1.7%	73.2	18.8x	4.2x
Engineering	4,494	4,493	+1.44	+0.03%	42	527,559	6.9%	131.7	3.2%	27.6x	1.8x	ICB	74,135	1.7%	0.0	68.1x	1.6x
Food & Allied	21,247	21,209	+38.12	+0.18%	21	378,588	5.0%	149.8	3.7%	21.5x	7.4x	BEACONPHAR	69,369	1.5%	12.7	85.3x	11.2x
IT	3,129	3,146	-17.69	-0.56%	11	40,787	0.5%	822.4	20.2%	29.1x	2.8x	BXPBARMA	68,746	1.5%	90.6	13.5x	1.6x
Textile	1,632	1,632	+0.37	+0.02%	58	171,689	2.2%	9.6	0.2%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	11,179	10,798	+380.59	+3.52%	6	43,072	0.6%	377.2	9.2%	48.5x	2.2x	ISLAMIBANK	52,647	1.2%	9.0	10.7x	0.8x
Tannery	3,094	3,075	+19.44	+0.63%	6	33,317	0.4%	0.6	0.0%	40.4x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	12,317	12,425	-108.79	-0.88%	3	3,013	0.0%	32.0	0.8%	NM	106.3x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	693	695	-2.45	-0.35%	5	32,033	0.4%	40.7	1.0%	33.4x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,078	4,072	+6.39	+0.16%	15	228,771	3.0%	385.8	9.5%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	90	91	-0.73	-0.80%	9	37,120	0.5%	1.9	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	99	99	-0.31	-0.31%	250	3,138,308	41.1%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	527.5	+8.7%	145.4	NM	35.6x	SQURPHARMA	121,685	7.2%	10.0x	1.7x	BPML	82.1	+7.6%	245.7	22.0x	1.1x
BENGALWTL	28.1	+8.5%	30.0	55.1x	1.1x	BATBC	74,086	4.4%	16.8x	6.7x	ORIONPHARM	87.2	+1.6%	218.7	21.6x	0.9x
HAKKANIPUL	63.0	+7.7%	22.0	NM	2.7x	BEXIMCO	70,355	4.2%	8.2x	1.2x	GENEXIL	91.2	-1.2%	193.8	26.4x	5.0x
BPML	82.1	+7.6%	245.7	22.0x	1.1x	RENATA	68,196	4.0%	28.1x	4.6x	EGEN	62.5	-4.6%	185.6	43.4x	2.8x
MEGHNALIFE	66.0	+5.6%	45.2	NM	NM	BEACONPHAR	48,559	2.9%	85.3x	11.2x	AAMRANET	53.9	-1.3%	163.3	23.5x	1.5x
APEXFOODS	285.3	+5.1%	45.4	44.1x	2.2x	BXPBARMA	47,998	2.8%	13.5x	1.6x	ADVENT	27.3	-0.4%	161.2	25.6x	1.9x
DGIC	34.8	+4.8%	17.3	26.0x	3x	GP	38,700	2.3%	11.2x	9.1x	BSC	116.7	+1.5%	159.9	8.1x	1.5x
RUPALILIFE	84.1	+4.7%	44.9	NM	NM	BRACBANK	30,976	1.8%	10.9x	1.0x	ORIONINFU	527.5	+8.7%	145.4	NM	35.6x
SKICL	59.1	+4.6%	81.9	16.3x	2.9x	LHBL	27,278	1.6%	18.8x	4.2x	NAVANAPHAR	89.3	-2.6%	140.6	23.8x	1.9x
FINEFOODS	60.7	+4.3%	6.8	NM	5.7x	EBL	23,659	1.4%	7.6x	1.0x	EHL	82.2	+2.1%	119.2	13.3x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BDWELDING	29.8	-4.8%	27.2	NM	2.6x	PUBALIBANK	18,807	1.1%	5.5x	0.6x	BEXIMCO	115.6	104.1	208.0	2,453	263.98
SEAPEARL	178.4	-4.6%	97.8	66.1x	14x	CITYBANK	17,615	1.0%	4.5x	0.8x	RENATA	1,218.0	1,141.8	11.0	145	176.27
EGEN	62.5	-4.6%	185.6	43.4x	2.8x	ROBI	15,714	0.9%	NM	2.4x	SQURPHARMA	209.5	205.0	42.0	267	55.94
JUTESPINN	242.0	-2.9%	3.4	NM	NM	OLYMPIC	14,881	0.9%	19.5x	2.5x	BATBC	480.3	479.8	23.0	88	42.20
MONNOCERA	106.9	-2.7%	40.4	NM	1.3x	ALARABANK	14,671	0.9%	14.6x	1.1x	ORIONINFU	500.0	442.7	8.0	78	35.46
NAVANAPHAR	89.3	-2.6%	140.6	23.8x	1.9x	BSRMLTD	14,417	0.9%	8.7x	0.7x	SEAPEARL	188.7	183.0	3.0	157	28.88
ECABLES	184.5	-1.6%	7.4	NM	0.5x	ORIONPHARM	13,879	0.8%	21.6x	0.9x	BSCCL	199.8	199.8	18.0	102	20.47
AAMRATECH	40.5	-1.5%	40.6	25.9x	1.8x	UPGDCL	13,547	0.8%	13.6x	3.8x	BEACONPHAR	277.0	277.0	1.0	74	20.36
AAMRANET	53.9	-1.3%	163.3	23.5x	1.5x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	INTRACO	42.2	40.0	3.0	450	18.85
GENEXIL	91.2	-1.2%	193.8	26.4x	5.0x						SUMITPOWER	34.1	31.0	2.0	469	15.88

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

** The base of the Bond Index starts at 100, starting from Jan 13, 2022

Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
BEXIMCO	115.6	104.1	264.0	2,453	208	IBP (Q1 Un-audited): EPS was Tk. 0.17 for July-September, 2022 as against Tk. 0.33 for July-September, 2021. NOCFPS was Tk. 0.02 for July-September, 2022 as against Tk. 0.41 for July-September, 2021. NAV per share was Tk. 14.16 as on September 30, 2022 and Tk. 13.98 as on June 30, 2022. CONFIDCEM (Q1 Un-audited): Consolidated EPS was Tk. 1.68 for July-September 2022 as against Tk. 2.31 for July-September 2021; Consolidated NOCFPS was Tk. (2.50) for July-September 2022 as against Tk. (3.72) July-September 2021; Consolidated NAV per share was Tk. 73.95 as on September 30, 2022 and Tk. 72.24 as on June 30, 2022. DHAKAINS (Q3 Un-audited): EPS was Tk. 0.70 for July-September 2022 as against Tk. 0.78 for July-September 2021; EPS was Tk. 2.10 for January-September 2022 as against Tk. 2.48 for January-September 2021. NOCFPS was Tk. 2.43 for January-September 2022 as against Tk. 1.44 for January-September 2021. NAV per share (without Revaluation) was Tk. 22.63 as on September 30, 2022 and Tk. 23.14 as on December 31, 2021 and NAV per share (with Revaluation) was Tk. 33.26 as on September 30, 2022 and Tk. 33.78 as on December 31, 2021. APEXFOOT Syed Manzur Elahi, one of the Sponsor Directors of the Company, has expressed his intention to buy 38,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.
RENATA	1,218.0	1,141.8	176.3	145	11	
SQURPHARMA	209.5	205.0	55.9	267	42	
BATBC	480.3	479.8	42.2	88	23	
ORIONINFU	500.0	442.7	35.5	78	8	
SEAPEARL	188.7	183.0	28.9	157	3	
BSCCL	199.8	199.8	20.5	102	18	
BEACONPHAR	277.0	277.0	20.4	74	1	
INTRACO	42.2	40.0	18.8	450	3	
SUMITPOWER	34.1	31.0	15.9	469	2	
BENGALWTL	25.9	25.3	10.1	400	3	
PRIMEFIN	11.6	11.6	8.0	690	1	
BSRMLTD	90.0	90.0	8.0	89	1	
GENEXIL	99.9	99.9	7.9	79	1	
AL-HAJTEX	132.4	132.1	7.0	53	6	
SAIFPOWER	29.1	27.7	3.7	130	2	
AOL	33.0	32.9	3.4	103	2	
NEWLINE	45.1	45.1	3.4	75	2	
APEXFOODS	277.1	277.1	3.3	12	1	
GEMINISEA	419.0	419.0	3.1	8	1	
PHARMAID	731.4	731.4	2.0	3	1	
PTL	77.0	69.5	1.9	27	3	
Total			767.0		388	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Salvo Chemical Industry Limited	-	0.0%	10.0%	Record Date	4-Dec-22
Orion Pharma Ltd.	-	0.0%	10.0%	Record Date	4-Dec-22
Orion Infusion Ltd.	-	10.0%	10.0%	Record Date	4-Dec-22
Rangpur Dairy & Food Products Ltd.	-	0.0%	5.0%	Record Date	5-Dec-22
Esquire Knit Composite Limited	-	0.0%	10.0%	Record Date	5-Dec-22
Silco Pharmaceuticals Limited	-	0.0%	5.0%	Record Date	5-Dec-22
Padma Oil Co. Ltd.	-	0.0%	125.0%	Record Date	5-Dec-22
Atlas Bangladesh Ltd.	-	0.0%	0.0%	Record Date	5-Dec-22
Confidence Cement Ltd.	-	5.0%	5.0%	Record Date	5-Dec-22
Aramit Limited	-	0.0%	50.0%	Record Date	5-Dec-22
Aramit Cement Limited	-	0.0%	5.0%	Record Date	5-Dec-22
Maksons Spinning Mills Limited	-	0.0%	10.0%	Record Date	6-Dec-22
LafargeHolcim Bangladesh Limited	-	0.0%	18.0%	Record Date	6-Dec-22
Information Services Network Ltd.	-	0.0%	3.0%	Record Date	7-Dec-22
Sonali Aansh Industries Limited	-	100.0%	0.0%	Record Date	7-Dec-22
Eastern Cables Ltd.	-	0.0%	2.0%	Record Date	8-Dec-22
Confidence Cement Ltd.	-	0.0%	50.0%	Record Date	8-Dec-22

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