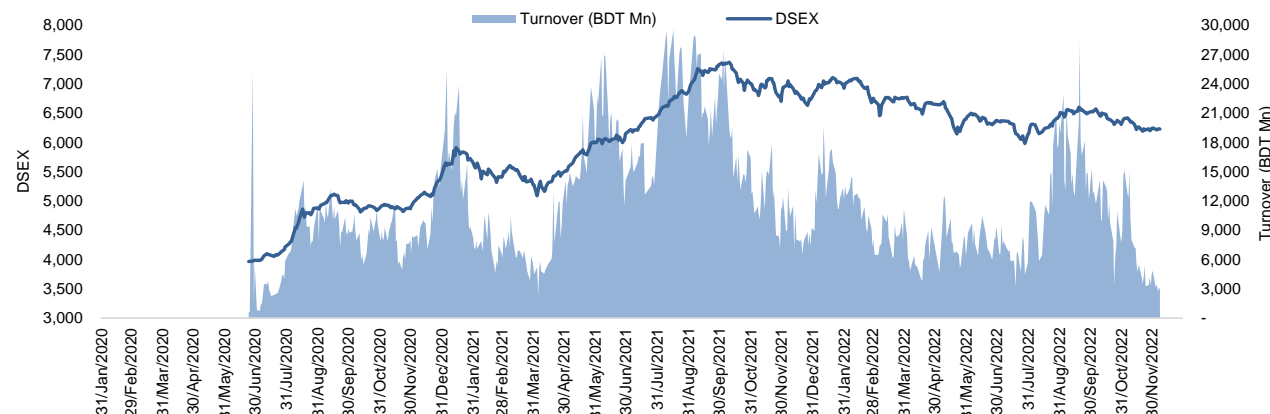


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.09%) lost 5.86 points and closed at 6,227.82. The blue-chip index DS30 (-0.17%), the Shariah-based index DSES (-0.14%), and the large-cap index CDSET (-0.10%) closed at 2,203.58, 1,361.62, and 1,218.14 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.02% followed by Pharmaceutical (+0.00%), Telecommunication (0.00%). Food & Allied experienced the highest loss of 0.11% followed by Bank (-0.11%), Fuel & Power (-0.02%), NBF1 (-0.01%). Block trades contributed 6.3% of the overall market turnover. Beach Hatchery Ltd. (0.0%) was the most traded share with a turnover of BDT 334 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,227.82	6,233.68	-5.86	-0.09%	-7.8%
DS30	2,203.58	2,207.24	-3.66	-0.17%	-13.0%
DSES	1,361.62	1,363.54	-1.93	-0.14%	-4.9%
CDSET	1,218.14	1,219.37	-1.23	-0.10%	-10.4%

	Advanced	Declined	Unchanged	Total
All Category	19	55	218	292
A Category (Equity)	13	42	156	211
B Category (Equity)	4	8	52	64
N Category (Equity)	1	4	3	8
Z Category (Equity)	1	1	7	9
Mutual Funds	0	0	14	14
Corporate Bonds	1	1	1	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,627,129	7,631,453	-0.1%
	Mn USD	72,261	72,302	
Turnover	Mn BDT	2,957	3,113	-5.0%
	Mn USD	28	29	
Volume	Mn Shares	46	45	+3.7%
	No. of Trade	61,019	69,531	-12.2%

* Average Interbank Exchange Rate is BDT 105.55 as of Dec 07, 2022

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Figure: Sectorial Turnover (BDT)

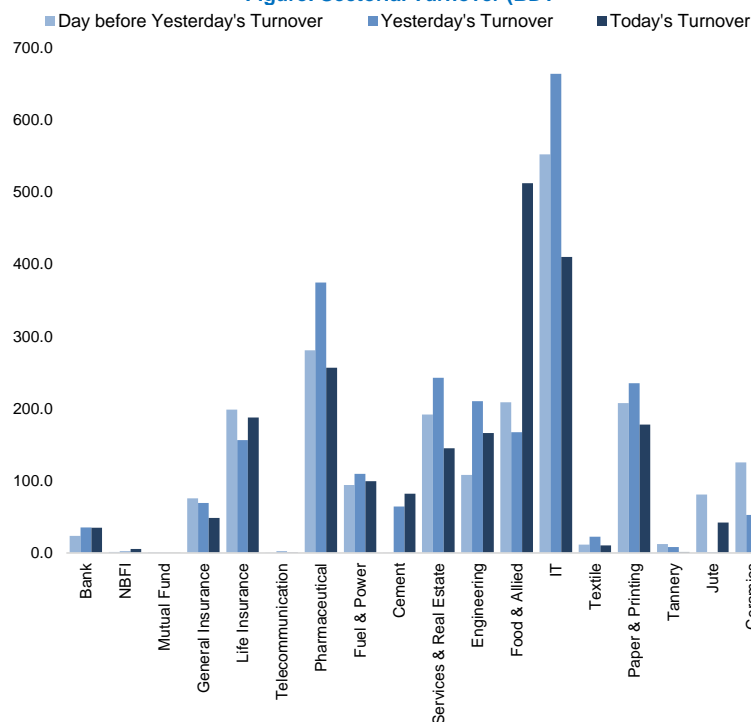
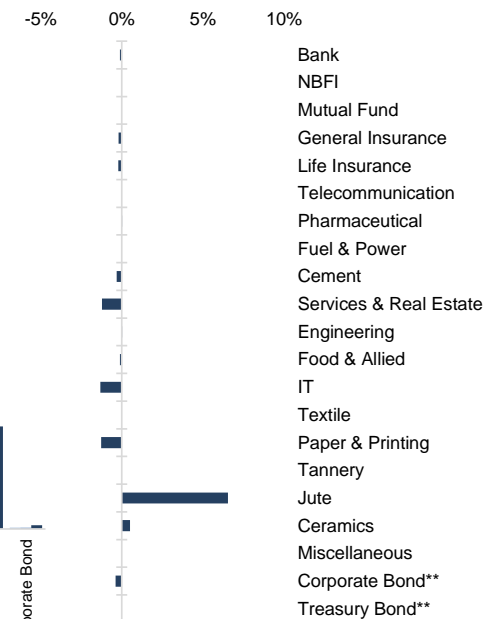


Figure: Sectorial Mcap Change



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	1,429	-1.53	-0.11%	34	666,993	8.8%	35.1	1.4%	7.7x	0.7x	GP	386,996	8.6%	0.3	11.2x	9.1x
NBFI	1,921	1,921	-0.18	-0.01%	23	187,417	2.5%	5.5	0.2%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	0.4	0.0%	NM	0.8x	BATBC	280,098	6.3%	0.5	16.8x	6.7x
General Insurance	3,192	3,198	-6.45	-0.20%	41	92,563	1.2%	48.7	2.0%	15.7x	1.5x	SQURPHARMA	185,977	4.2%	2.0	10.0x	1.7x
Life Insurance	2,488	2,493	-5.19	-0.21%	14	69,783	0.9%	187.8	7.6%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.5	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,777	3,777	+0.09	+0.00%	33	723,741	9.5%	256.4	10.4%	18.7x	2.4x	UPGDCL	135,475	3.0%	1.1	13.6x	3.8x
Fuel & Power	1,700	1,700	-0.39	-0.02%	23	448,194	5.9%	99.5	4.0%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.1	8.2x	1.2x
Cement	2,321	2,328	-7.25	-0.31%	7	111,457	1.5%	82.2	3.3%	33.5x	2.5x	BERGERPBL	80,271	1.8%	15.8	26.0x	7.0x
Services & Real Estate	1,747	1,768	-21.68	-1.23%	8	69,005	0.9%	145.2	5.9%	39.1x	0.9x	MARICO	76,277	1.7%	0.0	21.3x	44.9x
Engineering	4,500	4,499	+0.87	+0.02%	42	528,226	6.9%	166.2	6.7%	27.7x	1.8x	ICB	74,119	1.7%	0.1	68.1x	1.6x
Food & Allied	21,310	21,334	-23.41	-0.11%	21	379,716	5.0%	512.3	20.7%	21.5x	7.4x	BEACONPHAR	67,429	1.5%	10.6	82.9x	10.9x
IT	3,103	3,144	-41.34	-1.31%	11	40,453	0.5%	410.1	16.6%	28.8x	2.8x	BXPBARMA	66,203	1.5%	15.9	13.0x	1.6x
Textile	1,631	1,631	-0.17	-0.01%	58	171,566	2.3%	10.3	0.4%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,393	10,527	-133.73	-1.27%	6	40,045	0.5%	177.8	7.2%	45.1x	2.0x	ISLAMIBANK	52,647	1.2%	2.6	10.7x	0.8x
Tannery	3,099	3,099	-	-	6	33,369	0.4%	1.3	0.1%	40.5x	3.1x	DUTCHBANGL	43,554	1.0%	0.3	7.4x	1.1x
Jute	13,259	12,443	+815.51	+6.55%	3	3,243	0.0%	41.9	1.7%	NM	114.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	701	697	+3.51	+0.50%	5	32,399	0.4%	146.2	5.9%	33.8x	1.9x	POWERGRID	37,347	0.8%	0.7	38.5x	0.4x
Miscellaneous	4,087	4,089	-1.79	-0.04%	15	229,261	3.0%	141.9	5.7%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.3	10.0x	0.9x
Corporate Bond**	91	92	-0.35	-0.38%	9	37,727	0.5%	5.2	0.2%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	99	99	-0.02	-0.02%	250	3,128,288	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
SONALIANS	434.0	+8.7%	39.9	NM	3.8x	SQURPHARMA	121,685	7.2%	10.0x	1.7x	BEACHHATCH	41.7	-	333.7	71.9x	4.2x
MONNOAGML	767.3	+7.5%	118.0	NM	4.4x	BATBC	74,086	4.4%	16.8x	6.7x	MONNOCERA	116.6	+3.8%	145.5	NM	1.4x
ORIONINFU	704.3	+7.5%	5.0	NM	47.6x	BEXIMCO	70,355	4.2%	8.2x	1.2x	AAMRANET	56.0	-0.9%	143.8	24.5x	1.6x
AMBEEPHA	553.3	+4.8%	17.7	NM	24.9x	RENATA	68,196	4.0%	28.1x	4.6x	MONNOAGML	767.3	+7.5%	118.0	NM	4.4x
MONNOCERA	116.6	+3.8%	145.5	NM	1.4x	BEACONPHAR	47,200	2.8%	82.9x	10.9x	ORIONPHARM	85.2	-2.0%	93.2	21.1x	0.9x
JUTESPINN	237.2	+2.6%	2.0	NM	NM	BXPBARMA	46,223	2.7%	13.0x	1.6x	BPML	75.1	-1.6%	91.8	20.1x	1.0x
FINEFOODS	60.2	+2.2%	4.0	NM	6x	GP	38,700	2.3%	11.2x	9.1x	GENEXIL	88.6	-1.9%	87.5	25.6x	4.9x
BDTHAIFOOD	49.2	+1.7%	33.8	NM	3.4x	BRACBANK	30,976	1.8%	10.9x	1.0x	EHL	80.5	-1.6%	87.4	13.0x	1.1x
KAY&QUE	272.4	+1.6%	3.6	NM	3.7x	LHBL	26,581	1.6%	18.4x	4.1x	BSC	115.7	+0.2%	86.9	8.0x	1.5x
ADVENT	27.2	+1.1%	58.1	25.5x	1.9x	EBL	23,659	1.4%	7.6x	1.0x	LHBL	64.8	-0.5%	81.7	18.4x	4.1x

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)
PADMALIFE	47.1	-3.3%	31.5	NM	NM	PUBALIBANK	18,666	1.1%	5.5x	0.6x	RENATA	1,218.0	1,141.8	7.0	128	155.14
EGEN	55.5	-3.1%	17.6	38.5x	3x	CITYBANK	17,615	1.0%	4.5x	0.8x	ORIONINFU	680.0	615.0	9.0	193	121.88
UNIQUEHRL	57.8	-2.7%	13.7	15.5x	0.7x	ROBI	15,714	0.9%	NM	2.4x	SBACBANK	10.6	10.6	2.0	4,640	49.18
NAVANAPHAR	79.6	-2.6%	38.6	21.2x	1.7x	OLYMPIC	15,524	0.9%	20.3x	2.6x	SALVOCHEM	57.9	55.7	44.0	471	26.25
ITC	33.7	-2.3%	18.4	16.9x	1.9x	ALARABANK	14,609	0.9%	14.6x	1.1x	BSCCL	199.8	199.8	14.0	90	17.99
GEMINISEA	395.1	-2.1%	48.7	28.8x	21.5x	BSRMLTD	14,417	0.9%	8.7x	0.7x	BEXIMCO	124.9	104.1	13.0	137	15.49
AGNISYSL	23.0	-2.1%	20.1	21.1x	1.5x	ORIONPHARM	13,561	0.8%	21.1x	0.9x	SQURPHARMA	208.0	207.0	17.0	62	12.96
DGIC	32.8	-2.1%	4.9	24.5x	2.9x	UPGDCL	13,547	0.8%	13.6x	3.8x	BATBC	479.8	479.8	11.0	20	9.73
ORIONPHARM	85.2	-2.0%	93.2	21.1x	0.9x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	INTRACO	38.0	37.5	2.0	240	9.02
PAPERPROC	205.5	-1.9%	22.9	43.6x	6.3x						BSRMLTD	89.8	89.8	1.0	72	6.48

* 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
RENATA	1,218.0	1,141.8	155.1	128	7	YPL The Board of Directors has recommended No dividend for the year ended June 30, 2022. Record Date: 28.12.2022. Date, time and venue of AGM will be notified later on. The Company has also reported EPS of Tk. (0.71), NAV per share of Tk. 6.16 and NOCFPS of Tk. (0.01) for the year ended June 30, 2022 as against Tk. (0.55), Tk. 11.12 and Tk. 0.80 respectively for the same period of the previous year. Reasons for deviation in EPS and NOCFPS: EPS decreased due to effect of COVID-19 pandemic, Ukraine- Russia war, shortage of working capital, drop in sales and increase of raw material cost. NOCFPS decreased significantly due to raw material supply crises in local/international market, purchase of most of the raw material locally in cash, receivable recovery being too slow and working capital shortage resulting from Covid-19 Pandemic and Ukraine- Russia war. LANKABAFIN The company has informed that Dhaka Stock Exchange (DSE) has approved the listing of ordinary shares of LankaBangla Securities Limited under Alternative Trading Board (ATB) of DSE. The company has also informed that they hold 92.31% shares of LankaBangla Securities Limited. AAMRANET The company has informed that the Board of Directors has decided to hold an EGM to obtain approval from shareholders for the following related party transactions: The Board has decided to sell Company's Data Centre and its related infrastructure (passive) to Aamra Holdings Limited (a related party for common directorship along with the significant control over the management of the Company) at an agreed price of BDT 115.00 million where the book value of the asset is BDT 84.47 million. It was noted by the Board that a net gain of BDT 23.66 million from the sale of assets will have a direct impact on profitability, increasing EPS by BDT 0.38 (considering post dividend paid-up capital). The Board has also decided to invest BDT 30.00 million in a new product line IPTSP (subject to BTRC license), BDT 70.00 million in infrastructure development of the existing MPLS business line and BDT 15.00 million in working capital from the fund, which will be collected through the asset sale. The company has also informed that the Board believes the introduction of a new product line and investment in profitable MPLS products will have a greater impact on the Company's profitability than the data centre. Date of EGM: 31.12.2022, Time: 4:30 PM, Venue: Digital Platform. Record Date for EGM: 28.12.2022.
ORIONINFU	680.0	615.0	121.9	193	9	
SBACBANK	10.6	10.6	49.2	4,640	2	
SALVOCHEM	57.9	55.7	26.3	471	44	
BSCCL	199.8	199.8	18.0	90	14	
BEXIMCO	124.9	104.1	15.5	137	13	
SQURPHARMA	208.0	207.0	13.0	62	17	
BATBC	479.8	479.8	9.7	20	11	
INTRACO	38.0	37.5	9.0	240	2	
BSRMLTD	89.8	89.8	6.5	72	1	
AAMRANET	58.0	57.8	6.1	105	3	
BEACHHATCH	42.0	42.0	5.0	118	1	
EGEN	60.3	60.3	4.9	82	1	
SUNLIFEINS	60.0	59.9	3.7	62	3	
JAMUNABANK	20.8	20.6	3.1	150	6	
MONNOCERA	116.5	110.0	2.7	24	4	
ROBI	27.0	27.0	2.7	100	1	
AOL	32.9	32.9	2.3	69	3	
GP	275.1	270.0	2.1	8	3	
LOVELLO	40.8	34.2	1.7	45	2	
BDLAMPS	242.0	242.0	1.4	6	1	
NAVANAPHAR	83.0	83.0	1.3	16	1	
Total			483.0		186	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Eastern Lubricants Ltd.	-	10.0%	40.0%	Record Date	11-Dec-22
Meghna Petroleum Limited	-	0.0%	150.0%	Record Date	11-Dec-22
Dominage Steel Building Systems Limited	-	0.0%	2.0%	Record Date	11-Dec-22
Ambee Pharmaceuticals Ltd.	-	20.0%	10.0%	Record Date	12-Dec-22
Rahima Food Corporation Limited	-	0.0%	5.0%	Record Date	13-Dec-22
Samata Leather Complex Ltd.	-	0.0%	0.0%	Record Date	15-Dec-22
Global Heavy Chemicals Limited	-	0.0%	2.0%	Record Date	18-Dec-22
Jamuna Oil Company Limited	-	0.0%	120.0%	Record Date	20-Dec-22
Beach Hatchery Ltd.	-	0.0%	1.5%	Record Date	22-Dec-22
Wata Chemicals Limited	-	0.0%	20.0%	Record Date	29-Dec-22
Yeakin Polymer Limited	-	0.0%	0.0%	Record Date	28-Dec-22

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