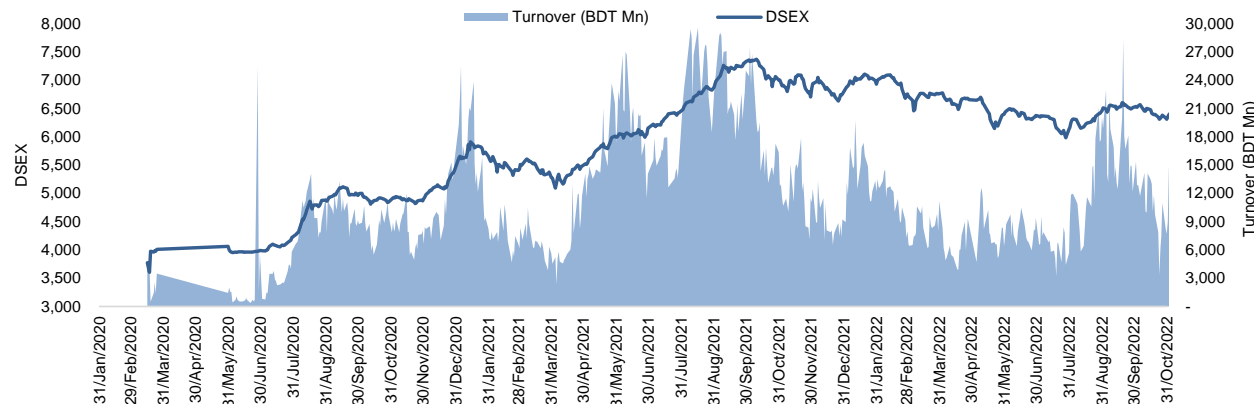


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.35%) gained 22.11 points and closed at 6,410.67. The blue-chip index DS30 (+0.39%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.04%) closed at 2,252.99, 1,401.10, and 1,232.24 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.66% followed by Food & Allied (+0.30%), Engineering (+0.20%), Fuel & Power (+0.13%). Bank experienced the highest loss of 0.18% followed by NBF (I) (-0.11%), Telecommunication (0.00%). Block trades contributed 0.7% of the overall market turnover. Bangladesh Export Import Company Ltd. (-0.5%) was the most traded share with a turnover of BDT 1,393 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,410.67	6,388.56	+22.11	+0.35%	-5.1%
DS30	2,252.99	2,244.15	+8.84	+0.39%	-11.0%
DSES	1,401.10	1,399.19	+1.91	+0.14%	-2.1%
CDSET	1,232.24	1,231.79	+0.45	+0.04%	-9.3%

	Advanced	Declined	Unchanged	Total
All Category	85	82	202	369
A Category (Equity)	62	70	119	251
B Category (Equity)	17	10	65	92
N Category (Equity)	4	1	3	8
Z Category (Equity)	2	1	15	18
Mutual Funds	1	0	26	27
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,742,986	7,713,357	+0.4%
	Mn USD	75,819	75,529	
Turnover	Mn BDT	15,124	14,616	+3.5%
	Mn USD	148	143	
Volume	Mn Shares	237	216	+9.4%
	No. of Trade	248,667	256,245	-3.0%

\* Average Interbank Exchange Rate is BDT 102.13 as of Nov 02, 2022

<b>Fahim Hassan</b> Research Associate (880) 1709636546 fahim.hassan@bracepl.com	<b>Md. Tanvir Ahmed</b> Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
---	--

Figure: Sectorial Turnover (BDT)

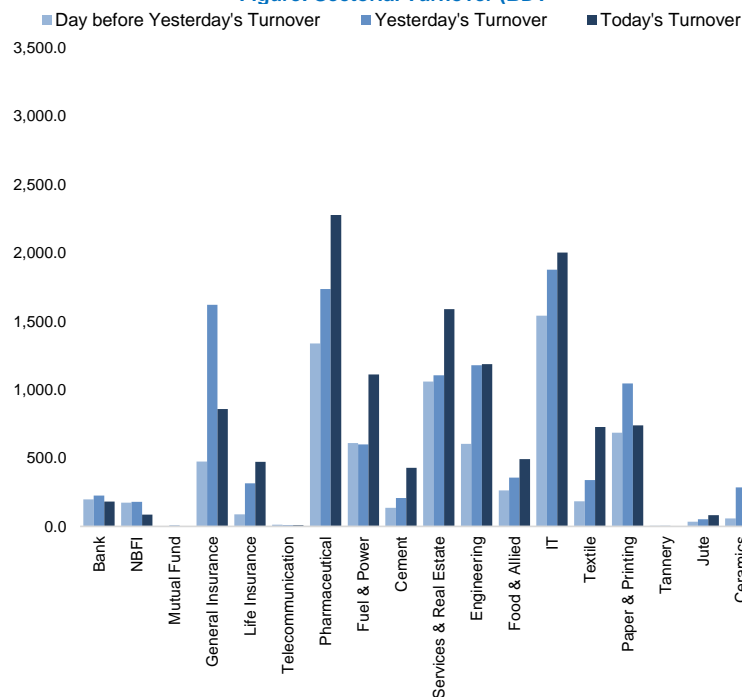
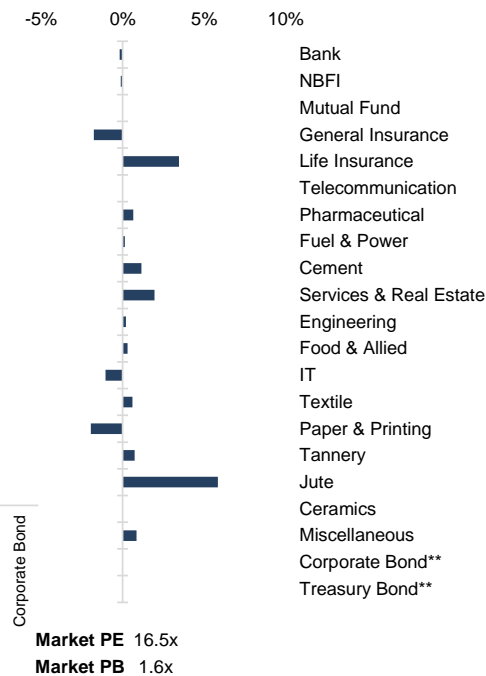


Figure: Sectorial Mcap Change



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	1,429	1,432	-2.57	-0.18%	33	658,961	8.5%	182.6	1.2%	7.7x	0.7x	GP	386,996	8.5%	1.5	11.2x	9.1x
NBFI	1,928	1,930	-2.09	-0.11%	23	188,044	2.4%	85.5	0.6%	NM	4.2x	WALTONHIL	317,378	7.0%	0.2	26.1x	3.1x
Mutual Fund	854	854	+0.24	+0.03%	37	38,621	0.5%	1.0	0.0%	NM	0.8x	BATBC	280,098	6.1%	5.1	16.8x	6.7x
General Insurance	3,328	3,388	-59.63	-1.76%	41	96,516	1.2%	858.4	5.8%	16.3x	1.6x	SQURPHARMA	187,484	4.1%	57.2	10.3x	1.8x
Life Insurance	2,493	2,410	+83.35	+3.46%	14	69,910	0.9%	471.9	3.2%	NM	NM	ROBI	157,138	3.4%	0.9	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	8.1	0.1%	15.5x	4.9x	RENATA	139,694	3.1%	2.7	27.3x	4.7x
Pharmaceutical	3,957	3,931	+25.93	+0.66%	33	758,138	9.8%	2,276.7	15.3%	19.2x	2.6x	UPGDCL	135,475	3.0%	5.5	13.6x	4.1x
Fuel & Power	1,711	1,709	+2.26	+0.13%	23	451,063	5.8%	1,110.2	7.5%	12.7x	1.1x	BEXIMCO	101,741	2.2%	1,392.9	8.1x	1.3x
Cement	2,351	2,324	+26.70	+1.15%	7	112,926	1.5%	428.1	2.9%	26.0x	2.4x	BERGERPBL	79,380	1.7%	1.2	25.8x	6.9x
Services & Real Estate	2,039	2,000	+39.17	+1.96%	8	80,548	1.0%	1,588.4	10.7%	NM	1.6x	LHBL	76,651	1.7%	412.1	18.7x	4.1x
Engineering	4,545	4,536	+9.09	+0.20%	42	533,561	6.9%	1,187.2	8.0%	22.8x	1.9x	ICB	74,135	1.6%	0.2	42.0x	1.6x
Food & Allied	21,215	21,152	+63.64	+0.30%	21	378,025	4.9%	492.9	3.3%	21.3x	7.4x	BXPBARMA	72,627	1.6%	134.6	14.2x	1.8x
IT	3,392	3,427	-35.67	-1.04%	11	44,216	0.6%	2,002.2	13.5%	32.4x	3.1x	BEACONPHAR	70,871	1.6%	104.7	75.8x	11.9x
Textile	1,650	1,640	+9.96	+0.61%	58	173,601	2.2%	727.5	4.9%	31.7x	1.1x	BRACBANK	57,619	1.3%	0.2	10.9x	1.0x
Paper & Printing	14,251	14,533	-282.39	-1.94%	6	54,908	0.7%	739.7	5.0%	83.1x	2.8x	ISLAMIBANK	53,130	1.2%	10.8	10.8x	0.8x
Tannery	3,061	3,039	+22.49	+0.74%	6	32,962	0.4%	2.3	0.0%	38.0x	3.2x	DUTCHBANGL	43,554	1.0%	1.1	7.4x	1.1x
Jute	13,198	12,470	+727.93	+5.84%	3	3,229	0.0%	82.3	0.6%	NM	64.8x	TITASGAS	40,459	0.9%	0.0	12.7x	0.6x
Ceramics	700	700	+0.15	+0.02%	5	32,380	0.4%	200.7	1.3%	33.9x	1.9x	POWERGRID	37,347	0.8%	0.8	10.2x	0.4x
Miscellaneous	4,267	4,231	+35.81	+0.85%	15	239,346	3.1%	2,422.4	16.3%	12.8x	1.9x	SUMITPOWER	36,308	0.8%	0.2	9.4x	1.0x
Corporate Bond**	90	90	-	-	9	37,272	0.5%	0.7	0.0%	NM	NM	BSCCL	36,098	0.8%	5.7	15.7x	3.4x
Treasury Bond**	100	100	-0.00	-0.00%	250	3,161,081	40.9%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONPHARM	126.9	+10.0%	901.9	30.9x	1.5x
BSC	145.9	+9.9%	454.3	10.1x	1.9x
NAVANAPHAR	109.6	+9.9%	463.6	32.0x	2.5x
PRAGATILIF	74.2	+9.9%	25.6	NM	NM
SUNLIFEINS	70.2	+9.9%	85.5	NM	NM
ITC	39.2	+9.8%	215.7	21.0x	2.3x
IBP	20.4	+9.7%	86.5	20.1x	1x
CLICL	16.0	+9.6%	0.0	NM	NM
PENINSULA	30.0	+9.5%	80.6	NM	1.0x
BDTHAIFOOD	46.5	+9.4%	40.3	63.8x	3.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	347.8	-8.0%	92.2	63.8x	7.7x
ISNLTD	67.1	-7.1%	71.6	NM	22x
SINOBANGLA	77.6	-6.6%	130.2	42.9x	2.8x
AAMRATECH	53.3	-6.2%	247.0	26.9x	2.2x
UNIONINS	40.1	-5.9%	65.2	18.9x	2.3x
SKICL	60.3	-5.3%	99.7	16.6x	3.0x
EIL	29.0	-4.9%	14.4	16.2x	1.7x
CRYSTALINS	44.0	-4.8%	23.2	14.7x	1.9x
EASTRNLUK	1,934.6	-4.7%	26.8	NM	12.7x
BNICL	65.9	-4.5%	101.9	19.1x	2.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	122,671	7.1%	10.3x	1.8x
BATBC	74,086	4.3%	16.8x	6.7x
BEXIMCO	70,659	4.1%	8.1x	1.3x
RENATA	68,199	3.9%	27.3x	4.7x
BXPBARMA	50,708	2.9%	14.2x	1.8x
BEACONPHAR	49,610	2.9%	75.8x	11.9x
GP	38,700	2.2%	11.2x	9.1x
BRACBANK	30,976	1.8%	10.9x	1.0x
LHBL	27,073	1.6%	18.7x	4.1x
ISLAMIBANK	23,866	1.4%	10.8x	0.8x
ORIONPHARM	20,198	1.2%	30.9x	1.5x
NBL	19,116	1.1%	NM	0.6x
PUBALIBANK	19,018	1.1%	5.6x	0.7x
CITYBANK	17,695	1.0%	4.5x	0.8x
ROBI	15,714	0.9%	NM	2.4x
ALARABANK	14,609	0.8%	14.6x	1.1x
OLYMPIC	14,590	0.8%	20.0x	2.6x
BSRMLTD	14,417	0.8%	8.7x	0.7x
UPGDCL	13,547	0.8%	13.6x	4.1x
SUMITPOWER	13,358	0.8%	9.4x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	116.1	-0.5%	1,392.9	8.1x	1.3x
ORIONPHARM	126.9	+10.0%	901.9	30.9x	1.5x
EHL	126.1	-3.1%	656.7	21.4x	1.7x
GENEXIL	87.4	-4.1%	641.0	25.3x	4.8x
LRBDL	48.3	+1.5%	539.4	22.7x	1.3x
NAVANAPHAR	109.6	+9.9%	463.6	32.0x	2.5x
BSC	145.9	+9.9%	454.3	10.1x	1.9x
LHBL	66.0	+1.7%	412.1	18.7x	4.1x
BPML	106.6	-2.5%	390.3	36.5x	1.4x
UNIQUEHRL	72.6	+8.7%	342.4	22.7x	0.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SUNLIFEINS	69.1	62.5	23.0	746	49.60
SEAPEARL	187.8	174.0	9.0	272	49.27
METROSPIN	51.0	45.5	8.0	434	20.60
FORTUNE	84.1	79.7	2.0	205	16.37
ADNTEL	155.0	137.0	6.0	113	15.90
PREMIERBAN	12.8	12.8	1.0	1,100	14.08
SAIFPOWER	29.7	29.7	4.0	384	11.40
ORIONPHARM	120.0	104.2	6.0	91	10.40
IMAMBUTTON	127.0	127.0	1.0	73	9.31
FINEFOODS	65.5	65.5	1.0	135	8.84

\* 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
SUNLIFEINS	69.1	62.5	49.6	746	23
SEAPEARL	187.8	174.0	49.3	272	9
METROSPIN	51.0	45.5	20.6	434	8
FORTUNE	84.1	79.7	16.4	205	2
ADNTEL	155.0	137.0	15.9	113	6
PREMIERBAN	12.8	12.8	14.1	1,100	1
SAIFPOWER	29.7	29.7	11.4	384	4
ORIONPHARM	120.0	104.2	10.4	91	6
IMAMBUTTON	127.0	127.0	9.3	73	1
FINEFOODS	65.5	65.5	8.8	135	1
BSCCL	219.0	218.9	5.7	26	3
SALVOCHEM	62.3	61.8	5.4	87	5
PTL	77.0	77.0	3.9	50	1
AAMRATECH	61.0	61.0	3.7	60	1
NAVANAPHAR	93.0	93.0	3.6	39	1
BPML	111.0	111.0	3.3	30	1
FAREASTLIF	87.0	87.0	2.7	31	2
INTRACO	52.1	52.0	2.6	50	2
EIL	30.8	30.0	2.2	72	3
MLDYEING	24.8	24.8	2.0	80	1
NHFIL	41.8	41.8	1.9	46	1
EHL	135.0	129.0	1.2	9	2
<b>Total</b>			<b>255.6</b>		<b>101</b>

**Important DSE News**
**BDTHAI**

The Board of Directors has recommended No dividend for the year ended June 30, 2022. Date of AGM: 27.12.2022, Time: 3:00 PM. Venue: Digital Platform. Record Date: 23.11.2022. The Company has also reported EPS of Tk. 0.02, NAV per share of Tk. 28.33 and NOCFPS of Tk. 0.51 for the year ended June 30, 2022 as against Tk. 1.25, Tk. 28.11 and Tk. (0.14) respectively for the same period of the previous year.

**RENATA**

The Company has informed that Renata Limited General Plant-2 (Rajendrapur General Facility) has been approved by USFDA. The inspection was triggered with Metoprolol Tartrate tablets. Renata has seven products (ANDAs) registered in the US. Of these products, Rolip (Rosuvastatin) is also sold in Bangladesh. Presently, the UK and EU are major export market for Renata. However, with this approval, the Company expects to make inroads into the US market with plain generics, Para IV and NCE-1 filings.

**MERCANBANK**

Md. Mizanur Rahman Chowdhury, one of the Sponsors of the company, has further informed that he has completed his transfer of 1,48,810 shares of the company to his wife Jebin Begum, General Shareholder of the company, by way of gift outside the trading system of the Exchange as per declaration disseminated on 31.10.2022.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Doreen Power Generations and Systems Limited	-	12.0%	18.0%	Record Date	6-Nov-22
Bangladesh Submarine Cable Company Limited	-	0.0%	46.0%	Record Date	7-Nov-22
Apex Spinning & Knitting Mills Limited	-	0.0%	20.0%	Record Date	7-Nov-22
Apex Foods Limited	-	0.0%	20.0%	Record Date	7-Nov-22
FAS Finance & Investment Limited	-	0.0%	0.0%	Record Date	7-Nov-22
Bangladesh Lamps Limited	-	7.0%	20.0%	Record Date	10-Nov-22
Gemini Sea Food Ltd.	-	30.0%	10.0%	Record Date	10-Nov-22
Renata Ltd.	-	7.0%	140.0%	Record Date	10-Nov-22
Far East Knitting & Dyeing Industries Limited	-	0.0%	10.0%	Record Date	13-Nov-22
Matin Spinning Mills Ltd.	-	0.0%	50.0%	Record Date	13-Nov-22
Intraco Refueling Station Limited	-	0.0%	10.0%	Record Date	14-Nov-22
Tamijuddin Textile Mills Limited	-	0.0%	30.0%	Record Date	14-Nov-22
The Peninsula Chittagong Limited	-	0.0%	2.5%	Record Date	14-Nov-22
JMI Syringes & Medical Devices Ltd.	-	36.0%	0.0%	Record Date	14-Nov-22
Rahim Textile Mills Ltd.	-	0.0%	10.0%	Record Date	14-Nov-22
Index Agro Industries Limited	-	0.0%	10.0%	Record Date	14-Nov-22
Taufika Foods and LOVELLO Ice-cream PLC	-	0.0%	12.0%	Record Date	14-Nov-22

**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.