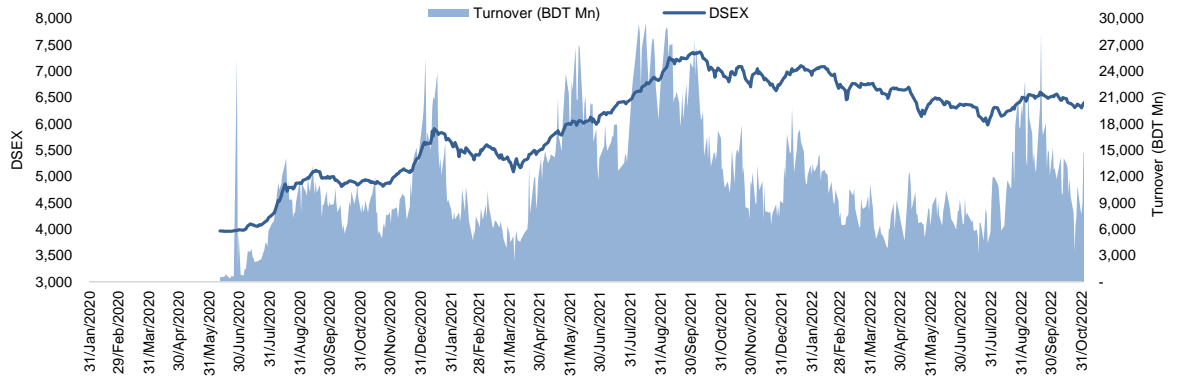


**Daily Market Update**

The market closed in green today. The benchmark index DSEX (+0.28%) gained 17.17 points and closed at 6,232.29. The blue-chip index DS30 (+0.58%), the Shariah-based index DSES (+0.73%), and the large-cap index CDSET (+0.53%) closed at 2,202.39, 1,363.99, and 1,216.94 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.89% followed by Fuel & Power (+0.03%), Bank (+0.02%), Engineering (+0.02%). Food & Allied experienced the highest loss of 0.01% followed by NBF1 (0.00%), Telecommunication (0.00%). Block trades contributed 4.4% of the overall market turnover. Genex Infosys Limited (+2.3%) was the most traded share with a turnover of BDT 233 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,232.29	6,215.12	+17.17	+0.28%	-7.8%
DS30	2,202.39	2,189.67	+12.73	+0.58%	-13.0%
DSES	1,363.99	1,354.10	+9.89	+0.73%	-4.7%
CDSET	1,216.94	1,210.49	+6.45	+0.53%	-10.5%

	Advanced	Declined	Unchanged	Total
All Category	50	43	219	312
A Category (Equity)	39	32	150	221
B Category (Equity)	9	7	54	70
N Category (Equity)	2	2	5	9
Z Category (Equity)	0	2	10	12
Mutual Funds	0	0	12	12
Corporate Bonds	0	1	0	1
Treasury Bonds	0	0	0	0

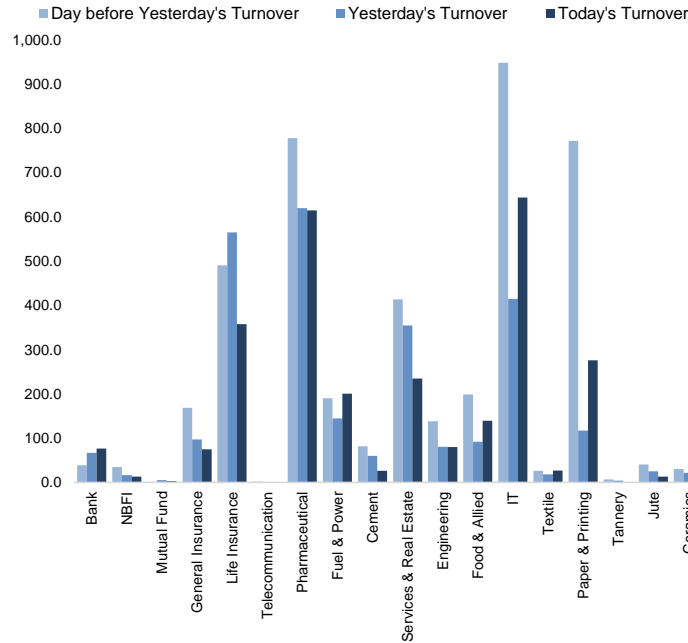
\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,643,765	7,636,257	+0.1%
	Mn USD	71,772	71,702	
Turnover	Mn BDT	3,397	3,238	+4.9%
	Mn USD	32	30	
Volume	Mn Shares	52	54	-5.1%
	No. of Trade	99,102	125,892	-21.3%

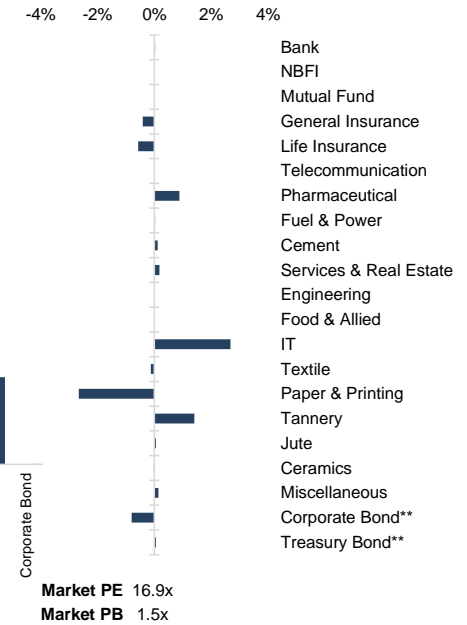
\* Average Interbank Exchange Rate is BDT 106.50 as of Nov 24, 2022

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**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	1,427	1,427	+0.36	+0.02%	34	666,593	8.7%	76.4	2.6%	7.7x	0.7x	GP	386,996	8.6%	0.5	11.2x	9.1x
NBFI	1,922	1,922	-0.06	-0.00%	23	187,457	2.5%	13.3	0.4%	NM	4.4x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	2.7	0.1%	NM	0.8x	BATBC	280,098	6.2%	0.2	16.8x	6.7x
General Insurance	3,197	3,210	-13.14	-0.41%	41	92,718	1.2%	74.9	2.5%	15.7x	1.5x	SQURPHARMA	188,459	4.2%	179.4	10.1x	1.7x
Life Insurance	2,535	2,550	-14.44	-0.57%	14	71,106	0.9%	357.3	12.0%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.6	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.4	28.1x	4.6x
Pharmaceutical	3,785	3,752	+33.21	+0.89%	33	725,245	9.5%	614.6	20.6%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.2	13.6x	3.8x
Fuel & Power	1,699	1,698	+0.57	+0.03%	23	447,877	5.9%	200.7	6.7%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.4	8.2x	1.2x
Cement	2,333	2,330	+2.66	+0.11%	7	112,054	1.5%	26.3	0.9%	33.2x	2.5x	BERGERPBL	79,380	1.8%	0.0	25.8x	6.9x
Services & Real Estate	1,778	1,775	+3.19	+0.18%	8	70,250	0.9%	234.7	7.9%	39.8x	0.9x	MARICO	76,277	1.7%	0.1	21.3x	44.9x
Engineering	4,491	4,490	+1.04	+0.02%	42	527,222	6.9%	79.7	2.7%	27.6x	1.8x	ICB	74,135	1.7%	0.0	68.1x	1.6x
Food & Allied	21,192	21,193	-1.54	-0.01%	21	377,604	4.9%	139.3	4.7%	21.4x	7.4x	BEACONPHAR	67,106	1.5%	32.8	82.5x	10.9x
IT	3,195	3,112	+83.41	+2.68%	11	41,653	0.5%	643.4	21.5%	29.7x	2.8x	BXPBARMA	65,266	1.5%	10.5	12.8x	1.6x
Textile	1,631	1,633	-1.95	-0.12%	58	171,531	2.2%	26.7	0.9%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	11,284	11,592	-308.18	-2.66%	6	43,475	0.6%	276.0	9.2%	48.9x	2.2x	ISLAMIBANK	53,130	1.2%	16.3	10.8x	0.8x
Tannery	3,080	3,037	+42.85	+1.41%	6	33,164	0.4%	0.7	0.0%	40.3x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	11,283	11,277	+6.65	+0.06%	3	2,760	0.0%	12.9	0.4%	NM	97.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	689	689	-0.08	-0.01%	5	31,878	0.4%	11.1	0.4%	33.2x	1.9x	POWERGRID	37,347	0.8%	0.1	38.5x	0.4x
Miscellaneous	4,085	4,079	+5.76	+0.14%	15	229,145	3.0%	196.7	6.6%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	90	91	-0.73	-0.80%	9	37,270	0.5%	1.4	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	99	99	+0.05	+0.05%	250	3,141,078	41.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap (BDT Mn)	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AAMRANET	51.8	+10.0%	150.5	22.6x	1.4x	SQURPHARMA	123,309	7.3%	10.1x	1.7x	GENEXIL	100.2	+2.3%	232.9	29.0x	5.5x
CLICL	72.0	+9.9%	57.3	NM	NM	BATBC	74,086	4.4%	16.8x	6.7x	NAVANAPHAR	96.2	+5.8%	200.8	25.6x	2.1x
APEXFOODS	281.9	+8.6%	60.4	43.6x	2.2x	BEXIMCO	70,355	4.2%	8.2x	1.2x	BPML	87.0	-3.4%	195.6	23.3x	1.2x
BDCOM	37.7	+7.4%	73.1	26.1x	2.3x	RENATA	68,196	4.0%	28.1x	4.6x	SQURPHARMA	212.6	+1.1%	179.4	10.1x	1.7x
BEACONPHAR	290.5	+7.0%	32.8	82.5x	10.9x	BEACONPHAR	46,974	2.8%	82.5x	10.9x	AAMRANET	51.8	+10.0%	150.5	22.6x	1.4x
NAVANAPHAR	96.2	+5.8%	200.8	25.6x	2.1x	BXPBARMA	45,569	2.7%	12.8x	1.6x	INTRACO	43.8	+2.1%	135.6	35.5x	3.4x
FORTUNE	79.5	+5.0%	0.0	37.9x	5x	GP	38,700	2.3%	11.2x	9.1x	PADMALIFE	54.5	-5.2%	119.9	NM	NM
AAMRATECH	41.1	+4.5%	61.6	26.3x	1.8x	BRACBANK	30,976	1.8%	10.9x	1.0x	SEAPEARL	178.5	+0.5%	107.6	66.1x	13.7x
KAY&QUE	258.6	+4.1%	3.3	NM	3.5x	LHBL	26,786	1.6%	18.5x	4.1x	ORIONPHARM	87.9	+1.5%	98.7	21.8x	0.9x
SINOBANGLA	67.1	+3.4%	42.0	36.3x	2.4x	ISLAMIBANK	23,866	1.4%	10.8x	0.8x	EHL	84.2	+0.6%	95.9	13.6x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	612.8	-7.5%	13.3	NM	41.4x	RENATA	1,218.0	1,141.8	4.0	128	155.82
ADVENT	25.0	-6.0%	58.2	23.4x	2x	INTRACO	43.8	38.7	10.0	608	25.34
PADMALIFE	54.5	-5.2%	119.9	NM	NM	BRACBANK	38.5	34.7	13.0	609	21.21
REPUBLIC	34.6	-4.9%	0.5	14.5x	1.9x	SONALIPAPR	640.0	640.0	3.0	29	18.56
PROGRESLIF	81.4	-4.7%	19.4	NM	NM	IFIC	11.0	10.4	18.0	1,689	18.24
HWAWELLTEX	45.3	-4.6%	5.2	NM	1.3x	ORIONINFU	712.0	705.0	2.0	25	17.34
BPML	87.0	-3.4%	195.6	23.3x	1.2x	BDTHAIFOOD	45.3	45.2	2.0	370	16.73
PRIMELIFE	56.8	-3.4%	4.0	NM	NM	BEXIMCO	115.6	104.1	19.0	146	15.59
AFCAGRO	23.6	-3.3%	11.8	NM	1.3x	SUMITPOWER	34.0	34.0	1.0	400	13.60
SUNLIFEINS	59.5	-3.3%	21.0	NM	NM	AOL	39.4	36.5	2.0	215	8.37

\* 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
RENATA	1,218.0	1,141.8	155.8	128	4
INTRACO	43.8	38.7	25.3	608	10
BRACBANK	38.5	34.7	21.2	609	13
SONALIPAPR	640.0	640.0	18.6	29	3
IFIC	11.0	10.4	18.2	1,689	18
ORIONINFU	712.0	705.0	17.3	25	2
BDTHAIFOOD	45.3	45.2	16.7	370	2
BEXIMCO	115.6	104.1	15.6	146	19
SUMITPOWER	34.0	34.0	13.6	400	1
AOL	39.4	36.5	8.4	215	2
SALVOCHEM	61.8	55.9	8.2	139	5
SPCL	69.8	61.3	7.4	108	5
SEAPEARL	170.0	170.0	6.7	39	2
ACIFORMULA	169.0	169.0	6.5	39	2
SQURPHARMA	202.4	202.4	6.5	32	1
BSCCL	200.0	199.8	4.8	24	6
NAVANAPHAR	98.0	98.0	3.9	40	1
PADMALIFE	62.8	60.0	3.8	63	2
LRBDL	35.4	35.4	3.5	100	1
SHASHADNIM	27.0	27.0	2.7	100	1
PRIMEINSUR	85.0	82.8	2.7	32	4
ADVENT	26.0	26.0	2.6	100	1
<b>Total</b>			<b>407.8</b>		<b>151</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Aman Feed Limited	-	0.0%	10.0%	Record Date	28-Nov-22
Square Pharmaceuticals Ltd.	-	0.0%	100.0%	Record Date	28-Nov-22
Square Textile Ltd.	-	0.0%	35.0%	Record Date	28-Nov-22
Sinobangla Industries Ltd.	-	1.0%	10.0%	Record Date	28-Nov-22
Navana Pharmaceuticals Limited	-	0.0%	11.0%	Record Date	28-Nov-22
The Dacca Dyeing & Manufacturing Co.Ltd.	-	0.0%	0.3%	Record Date	28-Nov-22
Bangas Ltd.	-	0.0%	3.0%	Record Date	28-Nov-22
Tallu Spinning Mills Ltd.	-	0.0%	0.0%	Record Date	28-Nov-22
Indo-Bangla Pharmaceuticals Limited	-	0.0%	1.0%	Record Date	28-Nov-22
Mithun Knitting and Dyeing Ltd.	-	0.0%	0.0%	Record Date	28-Nov-22
Mozaffar Hossain Spinning Mills Ltd.	-	0.0%	6.0%	Record Date	29-Nov-22
Hamid Fabrics Limited	-	0.0%	5.0%	Record Date	29-Nov-22
Tosrifa Industries Limited	-	0.0%	3.0%	Record Date	30-Nov-22
JMI Hospital Requisite Manufacturing Limited	-	0.0%	12.5%	Record Date	30-Nov-22
Associated Oxygen Limited	-	0.0%	10.0%	Record Date	30-Nov-22
Golden Son Ltd.	-	0.0%	10.0%	Record Date	30-Nov-22
Samorita Hospital Limited	-	5.0%	5.0%	Record Date	30-Nov-22

**Important DSE News**
**SAMATALETH**

The Board of Directors has recommended No dividend for the year ended June 30, 2022. Date of AGM: 29.12.2022, Time: 11:00 AM, Venue: Digital Platform. Record date: 15.12.2022. The Company has also reported EPS of Tk. (0.06), NAV per share of Tk. 14.32 and NOCFPS of Tk. 0.09 for the year ended June 30, 2022 as against Tk. 0.10, Tk. 14.39 and Tk. 0.24 respectively for the same period of the previous year.

**FASFIN**

**(Q3 Un-audited):** Consolidated EPS was Tk. (4.60) for July-September 2022 as against Tk. (2.45) for July-September 2021; Consolidated EPS was Tk. (17.79) for January-September, 2022 as against Tk. (7.20) for January-September, 2021. Consolidated NOCFPS was Tk. (1.74) for January-September 2022 as against Tk. 1.45 for January-September 2021. Consolidated NAV per share was Tk. (51.15) as on September 30, 2022 and Tk. (33.32) as on December 31, 2021.

**AOL**

**(Q1 Un-audited):** EPS was Tk. 0.41 for July-September 2022 as against Tk. 0.49 for July-September 2021; NOCFPS was Tk. 0.71 for July-September 2022 as against Tk. 0.83 for July-September 2021. NAV per share was Tk. 18.85 as on September 30, 2022 and Tk. 18.56 as on June 30, 2022.

**ACI**

The Company has informed that in relation to a Joint Venture Agreement dated 23 September 2002 between Advanced Chemical Industries Limited ("ACI") and Tata Consumer Products Overseas Holdings Limited, TCP offered to buy out the entire shareholding of ACI i.e., 50%, in the issued share capital of Tetley ACI (Bangladesh) Limited ("the Company") i.e. 3,250,000 fully paid-up ordinary shares only, for their long-term business plan. Under the Settlement Agreement, ACI will sell its entire shareholding at a consideration of BDT 106,177,500.00 only. In addition, ACI will be entitled to receive variable consideration of up to a maximum of BDT. 33,820,000.00 only, depending in part on performance under the said Sales & Distribution and Factory Lease agreements.

**SIMTEX**

Excel Farmganic Limited, one of the Corporate Directors of the Company, has further informed that it has completed its buying of 13,08,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 08.11.2022.

**RENATA**

The Company has informed that WHO (Geneva) has approved Rajendrapur Potent Product Facility (RPPF) of the Company and this approval shall permit them to bid in tenders for birth control pills in most countries. The Company has also informed that RPPF is the only factory in Bangladesh that has received WHO prequalification for birth control pills.

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