

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.20%) gained 12.46 points and closed at 6,244.40. The blue-chip index DS30 (+0.27%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.07%) closed at 2,114.17, 1,357.26, and 1,205.93 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.08%, followed by Bank (+0.06%), Engineering (+0.03%), NBF1 (+0.00%), Telecommunication (+0.00%), Fuel & Power (-0.00%), and Food & Allied (-0.03%), respectively. Block trades contributed 5.7% of the overall market turnover. Khulna Printing & Packaging Limited (+1.3%) was the most traded share with a turnover of BDT 272 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,244.40	6,231.94	+12.46	+0.20%	+0.6%
DS30	2,114.17	2,108.48	+5.69	+0.27%	-3.7%
DSES	1,357.26	1,355.33	+1.93	+0.14%	-0.1%
CDSET	1,205.93	1,205.10	+0.83	+0.07%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	107	49	169	325
A Category (Equity)	72	20	110	202
B Category (Equity)	31	22	47	100
N Category (Equity)	1	0	0	1
Z Category (Equity)	3	7	12	22
Mutual Funds	2	0	17	19
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,729,162	7,722,624	+0.1%
	Mn USD	70,106	70,046	
Turnover	Mn BDT	4,918	3,490	+40.9%
	Mn USD	45	32	
Volume	Mn Shares	124	86	+43.0%
No. of Trade		150,289	116,377	+29.1%

\* Average Interbank Exchange Rate is BDT 110.25 as of Dec 04, 2023

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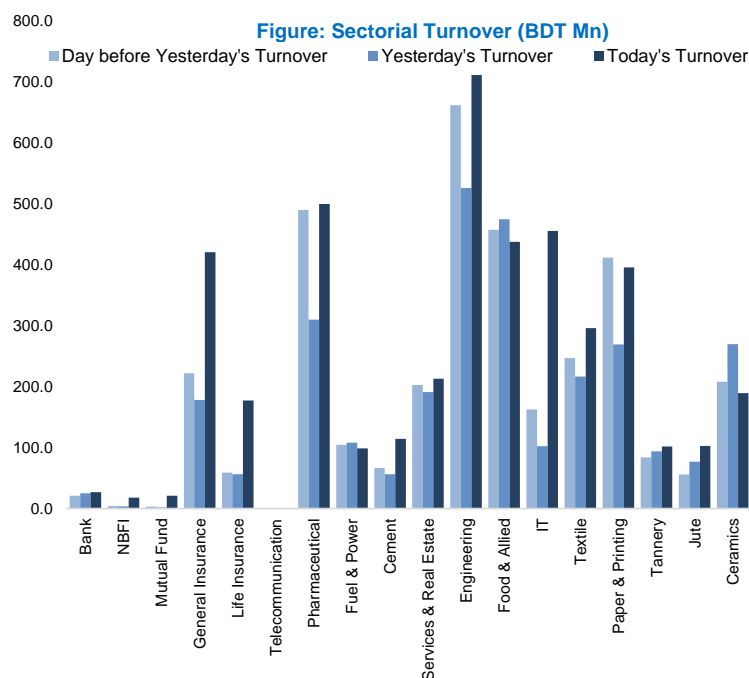
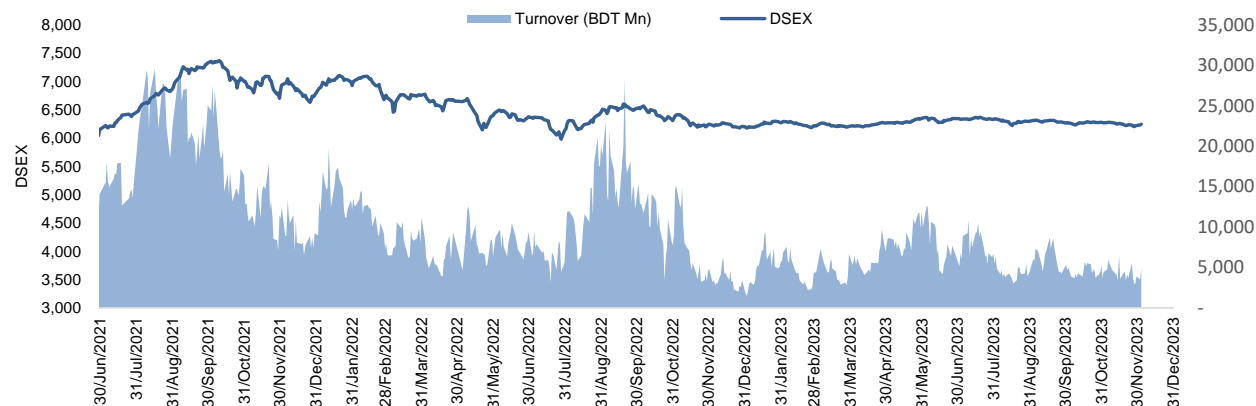
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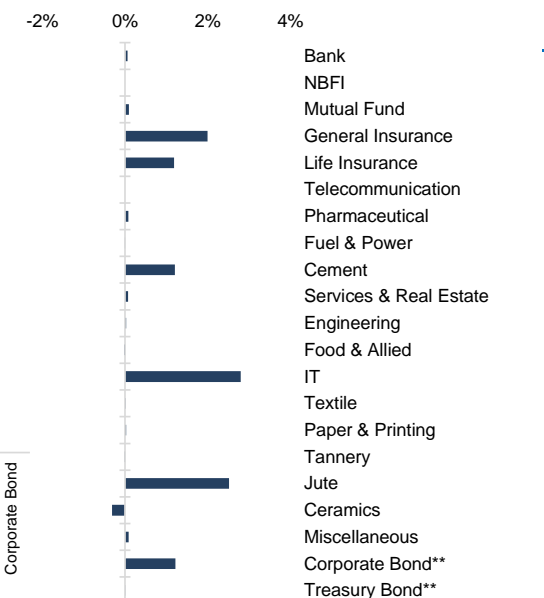
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**Figure: Sectorial Mcap Change**



Market PE 19.4x

Market PB 1.6x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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	1,441	1,440	+0.89	+0.06%	35	679,764	8.8%	26.8	0.6%	12.4x	0.7x	GP	386,996	8.6%	0.1	12.5x	6.4x
NBFI	1,917	1,917	-	-	23	186,572	2.4%	17.7	0.4%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	827	827	+0.80	+0.10%	37	39,136	0.5%	21.2	0.5%	NM	0.7x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,487	3,419	+68.40	+2.00%	42	101,890	1.3%	420.4	9.1%	18.9x	1.6x	SQURPHARMA	185,977	4.1%	16.1	9.5x	1.5x
Life Insurance	2,599	2,568	+30.49	+1.19%	15	72,642	0.9%	177.2	3.8%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.1	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,709	3,706	+2.91	+0.08%	33	716,987	9.3%	499.4	10.8%	19.5x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,698	1,698	-0.04	-0.00%	23	447,909	5.8%	98.8	2.1%	42.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,537	2,507	+30.33	+1.21%	7	121,861	1.6%	114.5	2.5%	17.3x	2.6x	LHBL	80,483	1.8%	77.5	12.7x	3.8x
Services & Real Estate	1,759	1,758	+1.37	+0.08%	8	69,509	0.9%	213.0	4.6%	22.8x	0.9x	BERGERPBL	79,751	1.8%	7.2	25.8x	6.3x
Engineering	4,512	4,511	+1.23	+0.03%	42	529,927	6.9%	711.3	15.3%	26.9x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,195	21,201	-5.49	-0.03%	21	392,191	5.1%	437.5	9.4%	19.7x	6.9x	BXPHERMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,937	2,857	+79.97	+2.80%	11	38,285	0.5%	455.3	9.8%	30.3x	2.5x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,657	1,656	+0.26	+0.02%	58	171,552	2.2%	296.0	6.4%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,284	10,281	+3.28	+0.03%	6	39,625	0.5%	395.6	8.5%	59.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,096	3,096	-0.28	-0.01%	6	35,050	0.5%	101.7	2.2%	57.7x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	18,063	17,619	+443.69	+2.52%	3	4,419	0.1%	102.7	2.2%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	699	702	-2.19	-0.31%	5	32,347	0.4%	189.4	4.1%	54.3x	1.9x	UNILEVERCL	38,834	0.9%	3.9	39.3x	18.8x
Miscellaneous	4,178	4,174	+3.81	+0.09%	14	227,456	2.9%	359.1	7.7%	26.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,106	4,056	+49.61	+1.22%	12	41,383	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	238	3,185,532	41.3%	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
BDAUTOCA	144.7	+10.0%	29.9	NM	19.6x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	KPPL	30.1	+1.3%	272.5	NM	NM
ISNLTD	53.6	+9.8%	39.9	NM	17.7x	BATBC	74,086	4.3%	15.4x	5.7x	CENTRALPHL	19.5	+9.6%	244.4	NM	3.5x
DESHBANDHU	37.2	+9.7%	62.4	62.0x	1.9x	BEXIMCO	69,196	4.0%	34.2x	1.2x	GENEXIL	71.2	+8.9%	189.2	25.4x	3.6x
CENTRALPHL	19.5	+9.6%	244.4	NM	3.5x	RENATA	68,042	3.9%	66.1x	4.4x	AFTABAUTO	34.2	-0.6%	180.5	NM	0.7x
GENEXIL	71.2	+8.9%	189.2	25.4x	3.6x	BXPHERMA	45,564	2.6%	13.8x	1.4x	YPL	31.4	-1.3%	159.7	NM	5.9x
PDL	13.8	+7.0%	148.1	NM	1.0x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	PDL	13.8	+7.0%	148.1	NM	1.0x
RUPALILIFE	107.2	+6.3%	50.6	NM	NM	GP	38,700	2.2%	12.5x	6.4x	EMERALDOIL	97.5	-3.2%	123.6	49.2x	NM
MEGHNALIFE	76.9	+5.9%	65.0	NM	NM	BRACBANK	30,964	1.8%	7.7x	0.9x	BSC	108.8	+1.7%	110.2	6.7x	1.3x
1STPRIMFMF	16.2	+5.9%	17.6	NM	1.5x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	FUWANGFOOI	30.0	-	104.1	NM	11.5x
LIBRAINFU	1,517.4	+5.6%	39.8	NM	1.2x	LHBL	28,562	1.6%	12.7x	3.8x	MONNOCERA	111.6	-0.9%	102.9	38.4x	1.4x

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)
JUTESPINN	313.1	-4.1%	4.0	NM	NM	NBL	19,116	1.1%	NM	0.9x	SONALIANSH	660.0	610.0	5.0	76	49.82
SAMORITA	92.2	-3.8%	51.5	NM	2x	CITYBANK	18,190	1.0%	5.2x	0.7x	EMERALDOIL	110.7	91.9	5.0	428	47.10
MEGHNAPET	39.7	-3.6%	7.5	NM	NM	OLYMPIC	16,066	0.9%	17.5x	2.7x	SEAPPEARL	158.9	157.1	5.0	239	37.65
SAMATALETH	67.8	-3.4%	27.1	NM	4.7x	ROBI	15,714	0.9%	52.6x	2.4x	ACMEPL	31.9	31.9	15.0	893	28.48
EMERALDOIL	97.5	-3.2%	123.6	49.2x	NM	ALARABANK	14,357	0.8%	12.5x	1.1x	SQURPHARMA	208.0	205.3	20.0	81	16.78
PAPERPROC	211.1	-2.6%	37.0	42.1x	5.8x	BSRMLTD	14,210	0.8%	5.2x	0.6x	FAREASTLIF	82.0	69.0	6.0	173	13.56
OIMEX	22.0	-2.2%	17.6	NM	7.5x	SEAPPEARL	13,733	0.8%	28.6x	9.6x	LHBL	75.2	75.1	2.0	110	8.27
FUWANGCER	18.6	-2.1%	69.1	71.5x	1.6x	UPGDCL	13,547	0.8%	19.6x	4.1x	DESHBANDHU	35.3	34.0	4.0	221	7.63
DACCADYE	14.2	-2.1%	16.9	NM	0.4x	PRIMEBANK	13,491	0.8%	4.8x	0.7x	GP	261.6	261.6	4.0	29	7.46
NTC	454.8	-2.0%	1.0	NM	NM						BRACBANK	34.6	32.8	4.0	220	7.42

\* 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
SONALIANS	660.0	610.0	49.8	76	5	<b>HFL</b> The Company has further informed that the 29th AGM of the Company will be held on December 28, 2023 at 3:30 PM instead of earlier declared time of 11:00 AM on December 28, 2023. Other information of the AGM will remain unchanged.
EMERALDOIL	110.7	91.9	47.1	428	5	
SEAPEARL	158.9	157.1	37.6	239	5	
ACMEPL	31.9	31.9	28.5	893	15	
SQURPHARMA	208.0	205.3	16.8	81	20	
FAREASTLIF	82.0	69.0	13.6	173	6	
LHBL	75.2	75.1	8.3	110	2	
DESHBANDHU	35.3	34.0	7.6	221	4	
GP	261.6	261.6	7.5	29	4	
BRACBANK	34.6	32.8	7.4	220	4	
AAMRANET	55.0	55.0	5.5	100	2	
ACMELAB	77.0	76.5	3.4	44	6	
POWERGRID	47.2	47.2	3.2	68	1	
EBL	29.0	29.0	2.9	100	1	
BBSCABLES	45.0	45.0	2.3	50	1	
AL-HAJTEX	133.0	132.0	2.2	17	2	
KBPPWBIL	70.0	70.0	2.1	30	1	
PREMIERCEM	58.0	58.0	2.0	35	1	
MEGHNALIFE	68.0	68.0	1.8	26	1	
CONFIDCEM	87.0	83.5	1.7	20	3	
KPCL	24.0	24.0	1.6	66	3	
AAMRATECH	30.6	30.6	1.6	52	1	
<b>Total</b>			<b>280.0</b>		<b>134</b>	

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RDFOOD		0.0%	5%	Record Date	5-Dec-23
ESQUIRENIT		0.0%	10%	Record Date	5-Dec-23
QUEENSOUTH		0.0%	6%	Record Date	5-Dec-23
LRGLOBMF1		0.0%	3%	Record Date	5-Dec-23
VAMLBDMF1		0.0%	2%	Record Date	5-Dec-23
KBPPWBIL		0.0%	0%	Record Date	5-Dec-23
SSSTEEL		0.0%	2%	Record Date	5-Dec-23
DOMINAGE		0.0%	1%	Record Date	6-Dec-23
ARAMITCEM		0.0%	0%	Record Date	6-Dec-23
aramit		0.0%	25%	Record Date	6-Dec-23
GHCL		0.0%	0%	Record Date	6-Dec-23
CNATEX		0.0%	1%	Record Date	6-Dec-23
SALAMCRST		0.0%	5%	Record Date	7-Dec-23
SONALIANS		100.0%	10%	Record Date	7-Dec-23
PHARMAID		0.0%	10%	Record Date	7-Dec-23
DSSL		0.0%	1%	Record Date	7-Dec-23
INTECH		0.0%	0%	Record Date	7-Dec-23

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