

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.05%) gained 3.17 points and closed at 6,247.57. The blue-chip index DS30 (-0.03%), the Shariah-based index DSES (+0.13%), and the large-cap index CDSET (+0.02%) closed at 2,113.52, 1,359.05, and 1,206.19 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.11% followed by Engineering (+0.10%), Bank (+0.07%), Pharmaceutical (+0.06%), Fuel & Power (+0.03%), NBF1 (+0.01%), and Telecommunication (0.00%), respectively. Block trades contributed 3.9% of the overall market turnover. Central Pharmaceuticals Limited (+5.1%) was the most traded share with a turnover of BDT 256 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,247.57	6,244.40	+3.17	+0.05%	+0.7%
DS30	2,113.52	2,114.17	-0.66	-0.03%	-3.7%
DSES	1,359.05	1,357.26	+1.79	+0.13%	+0.0%
CDSET	1,206.19	1,205.93	+0.26	+0.02%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	60	94	170	324
A Category (Equity)	28	62	115	205
B Category (Equity)	26	26	45	97
N Category (Equity)	1	0	0	1
Z Category (Equity)	5	6	10	21
Mutual Funds	4	0	19	23
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,730,624	7,729,162	+0.0%
	Mn USD	70,119	70,106	
Turnover	Mn BDT	4,600	4,918	-6.5%
	Mn USD	42	45	
Volume	Mn Shares	135	124	+9.3%
No. of Trade		144,755	150,289	-3.7%

\* Average Interbank Exchange Rate is BDT 110.25 as of Dec 05, 2023

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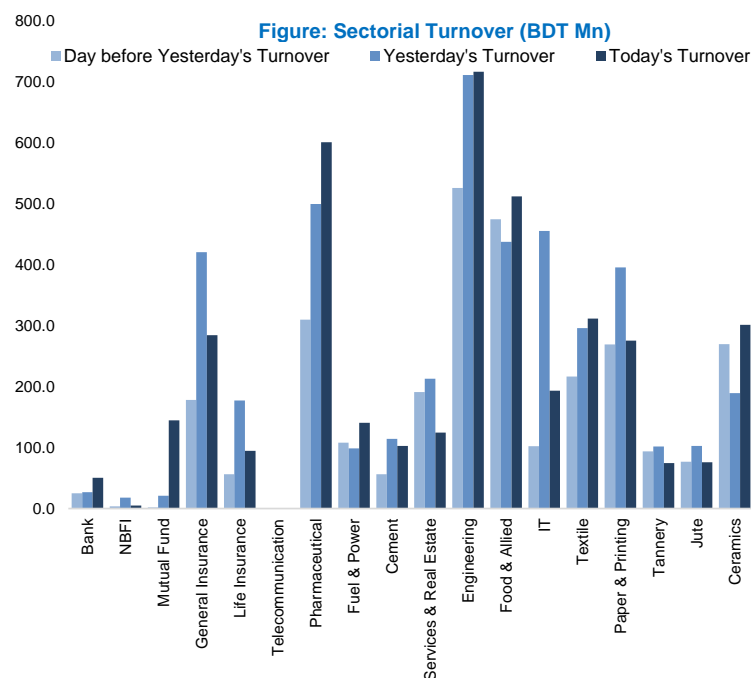
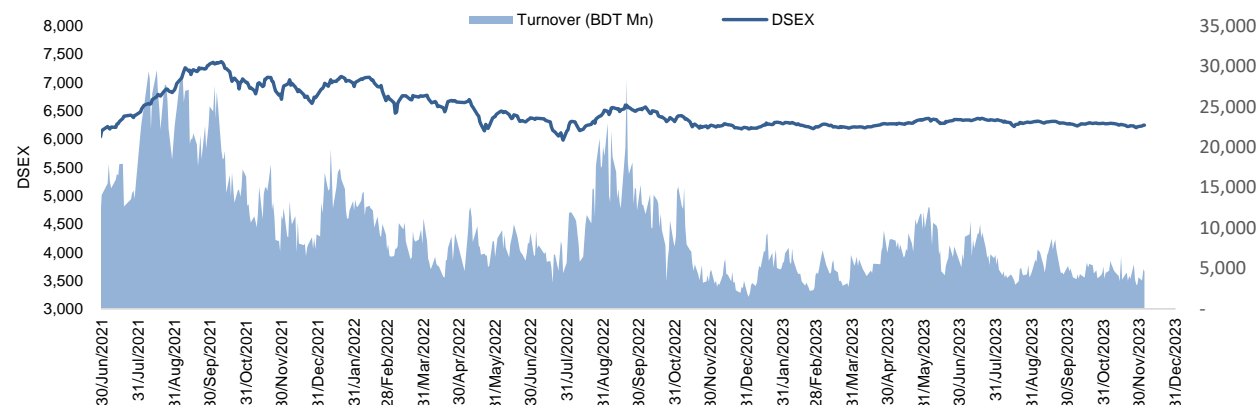
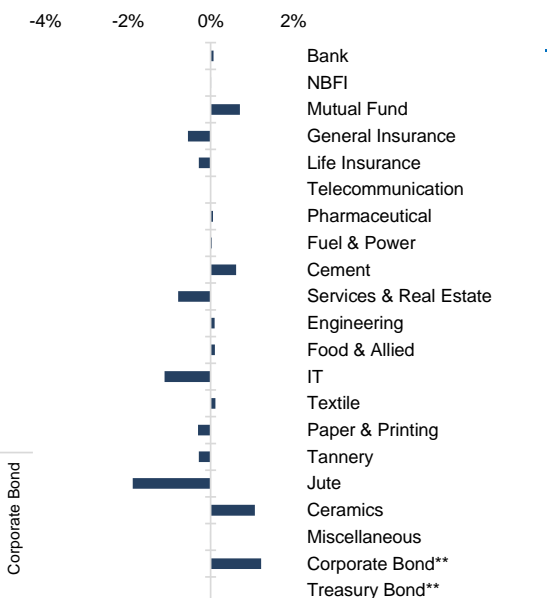


Figure: Sectorial Mcap Change



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	1,442	1,441	+1.02	+0.07%	35	680,246	8.8%	50.7	1.1%	12.4x	0.7x	GP	386,996	8.6%	0.2	12.5x	6.4x
NBFI	1,917	1,917	+0.18	+0.01%	23	186,589	2.4%	4.9	0.1%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	833	827	+5.84	+0.71%	37	39,412	0.5%	144.8	3.3%	NM	0.8x	BATBC	280,098	6.2%	0.8	15.4x	5.7x
General Insurance	3,468	3,487	-19.01	-0.55%	42	101,334	1.3%	284.5	6.4%	18.8x	1.6x	SQURPHARMA	185,977	4.1%	25.6	9.5x	1.5x
Life Insurance	2,592	2,599	-7.35	-0.28%	15	72,436	0.9%	94.7	2.1%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.4	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	1.2	66.1x	4.4x
Pharmaceutical	3,711	3,709	+2.14	+0.06%	33	717,400	9.3%	600.7	13.6%	19.5x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,699	1,698	+0.56	+0.03%	23	448,058	5.8%	140.8	3.2%	42.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,551	2,535	+15.61	+0.62%	7	122,612	1.6%	102.6	2.3%	17.5x	2.6x	LHBL	81,296	1.8%	66.1	12.8x	3.8x
Services & Real Estate	1,745	1,759	-13.86	-0.79%	8	68,961	0.9%	124.6	2.8%	22.7x	0.9x	BERGERPBL	79,668	1.8%	6.3	25.8x	6.3x
Engineering	4,516	4,512	+4.30	+0.10%	42	530,432	6.9%	716.5	16.2%	26.9x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,218	21,195	+22.41	+0.11%	21	392,605	5.1%	511.9	11.6%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,904	2,937	-32.75	-1.12%	11	37,858	0.5%	193.5	4.4%	29.9x	2.5x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,659	1,657	+1.94	+0.12%	58	171,753	2.2%	311.4	7.0%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.1	86.9x	9.0x
Paper & Printing	10,253	10,284	-31.13	-0.30%	6	39,505	0.5%	275.7	6.2%	59.7x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,087	3,096	-8.92	-0.29%	6	34,949	0.5%	74.4	1.7%	57.5x	3.2x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	17,723	18,063	-340.52	-1.89%	3	4,335	0.1%	75.9	1.7%	NM	NM	TITASGAS	40,459	0.9%	0.2	NM	0.6x
Ceramics	707	699	+7.50	+1.07%	5	32,694	0.4%	301.3	6.8%	54.9x	1.9x	UNILEVERCL	38,743	0.9%	0.6	39.2x	18.7x
Miscellaneous	4,177	4,178	-0.71	-0.02%	14	227,417	2.9%	409.1	9.3%	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%	0.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	238	3,185,590	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				
CAPITECBGF	12.1	+10.0%	37.1	NM	1.2x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	CENTRALPHL	20.5	+5.1%	255.9	NM	3.7x				
STANCERAM	157.1	+9.9%	52.5	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	KPPL	28.7	-4.7%	189.7	NM	NM				
SKTRIMS	31.0	+9.9%	165.1	27.4x	1.9x	BEXIMCO	69,196	4.0%	34.2x	1.2x	FUWANGFOOC	30.9	+3.0%	175.4	NM	11.8x				
1STPRIMFMF	17.8	+9.9%	32.7	NM	1.7x	RENATA	68,042	3.9%	66.1x	4.4x	SKTRIMS	31.0	+9.9%	165.1	27.4x	1.9x				
BDTHAI	19.0	+9.8%	109.9	NM	0.7x	BXPBARMA	45,564	2.6%	13.8x	1.4x	EMERALDOIL	105.3	+8.0%	161.0	53.2x	NM				
CAPMIBLMF	11.6	+9.4%	19.6	NM	1.3x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	MONNOCERA	116.2	+4.1%	160.5	39.9x	1.4x				
EMERALDOIL	105.3	+8.0%	161.0	53.2x	NM	GP	38,700	2.2%	12.5x	6.4x	ORIONINFU	344.7	+6.4%	159.2	NM	23.1x				
NAVANACNG	27.7	+7.4%	30.8	NM	0.9x	BRACBANK	30,964	1.8%	7.7x	0.9x	AFTABAUTO	35.7	+4.4%	130.3	NM	0.7x				
SIMTEX	20.2	+6.9%	13.7	25.6x	0.9x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	YPL	30.5	-2.9%	127.3	NM	5.7x				
ORIONINFU	344.7	+6.4%	159.2	NM	23.1x	LHBL	28,562	1.6%	12.8x	3.8x	GQBALLPEN	162.6	-7.5%	123.5	NM	1.4x				
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	19,116	1.1%	NM	0.9x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)				
GQBALLPEN	162.6	-7.5%	123.5	NM	1.4x	CITYBANK	18,190	1.0%	5.2x	0.7x	SQURPHARMA	208.7	206.0	45.0	229	47.52				
KPPL	28.7	-4.7%	189.7	NM	NM	OLYMPIC	16,066	0.9%	17.6x	2.7x	EMERALDOIL	102.0	87.8	3.0	105	9.29				
SHYAMPSUG	183.9	-4.6%	9.0	NM	NM	ROBI	15,714	0.9%	52.6x	2.4x	SKTRIMS	30.1	28.8	4.0	299	8.94				
MEGHNA PET	38.0	-4.3%	8.1	NM	NM	ALARABANK	14,357	0.8%	12.5x	1.1x	BRACBANK	34.2	32.9	6.0	265	8.88				
DACCADYE	13.6	-4.2%	18.9	NM	0.4x	BSRMLTD	14,210	0.8%	5.2x	0.6x	KDSALTD	83.9	79.7	5.0	100	8.30				
DSHGARME	111.4	-3.7%	15.4	NM	6.2x	SEAPEARL	13,733	0.8%	28.1x	9.4x	DELTALIFE	149.0	123.0	3.0	49	6.88				
MONNOAGML	573.9	-3.1%	16.6	NM	3.3x	UPGDCL	13,547	0.8%	19.6x	4.1x	ACMEPL	35.2	31.9	7.0	182	5.85				
UNITEDINS	44.9	-3.0%	8.5	24.7x	1.4x	PRIMEBANK	13,491	0.8%	4.9x	0.7x	NAVANAPHAR	77.0	77.0	1.0	73	5.62				
YPL	30.5	-2.9%	127.3	NM	5.7x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.														
AZIZPIPES	118.8	-2.7%	39.9	NM	NM	** 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														
						SOUTHEASTB										14.0	14.0	1.0	343	4.81

\* 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
SQURPHARMA	208.7	206.0	47.5	229	45
EMERALDOIL	102.0	87.8	9.3	105	3
SKTRIMS	30.1	28.8	8.9	299	4
BRACBANK	34.2	32.9	8.9	265	6
KDSALTD	83.9	79.7	8.3	100	5
DELTALIFE	149.0	123.0	6.9	49	3
ACMEPL	35.2	31.9	5.8	182	7
NAVANAPHAR	77.0	77.0	5.6	73	1
HRTEX	114.9	113.9	5.4	48	2
SOUTHEASTB	14.0	14.0	4.8	343	1
SINGERBD	142.0	138.0	4.7	33	2
NBL	8.0	8.0	4.6	580	3
ACMELAB	78.0	76.5	3.7	48	7
SONALIPAPR	624.9	615.1	3.5	6	3
SEAPEARL	190.0	158.7	3.2	20	2
JAMUNABANK	20.6	20.4	2.9	143	4
ONEBANKPLC	9.5	9.5	2.9	306	2
EBL	29.0	29.0	2.9	100	1
MONNOCERA	117.2	116.5	2.3	20	2
GP	261.7	261.6	2.1	8	3
BSCCL	218.2	199.8	2.1	10	3
MARICO	2,350.0	2,350.0	2.0	1	1
<b>Total</b>			<b>181.2</b>		<b>153</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
CONFIDCEM		5.0%	5%	Record Date	7-Dec-23
FUWANGCER		0.0%	2%	Record Date	7-Dec-23
STANCERAM		0.0%	0%	Record Date	7-Dec-23
MONNOCERA		0.0%	10%	Record Date	7-Dec-23
MONOSPOOL		10.0%	15%	Record Date	10-Dec-23
PAPERPROC		8.0%	12%	Record Date	10-Dec-23
TAMIJTEX		0.0%	20%	Record Date	10-Dec-23

#### Important DSE News

##### ABBANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'AB Bank PLC.' instead of 'AB Bank Limited' with effect from December 05, 2023. Other things (except name) will remain unchanged.

##### MJLBD

The company has informed that the Board of Directors of the company has approved to purchase a new build 11,000 CBM pressurized LPG tanker at an agreed price of USD 32.50 Million and also approved an additional amount of USD 1.50 million for ship building supervision fee, consultancy fee, modification related expenditure, takeover expenses, legal fees, operational expenses, traveling expenses etc.

##### IMAMBUTTON

The company has informed that the board of directors has decided to run a Tannery Business (Leather Unit) at factory premises, 49/A, Sagorika Road, Fauzderhat Heavy I/A, Pahartali, Chattogram. The project's total cost will be Tk. 11.55 crore. The company invests Tk. 4.25 crore as initial investment. Rest Tk. 7.3 crore will be invested step by step. The Factory (Leather Unit) area is around 19,500 square feet and office area is 1000 square feet, Production capacity will be 160,000 pairs per annum and expected profit will be 2 crore per year.

##### SQURPHARMA

Mr. Samuel S Chowdhury, one of the Directors of the Company, has expressed his intention to buy 1,000,000 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange Limited within next 30 working days.

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