

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.05%) gained 2.9 points and closed at 6,250.47. The blue-chip index DS30 (-0.03%), the Shariah-based index DSES (+0.04%), and the large-cap index CDSET (+0.02%) closed at 2,112.82, 1,359.64, and 1,206.41 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.07% followed by NBF1 (+0.04%), Food & Allied (+0.03%), Fuel & Power (+0.02%), Bank (+0.02%), Engineering (+0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 5.6% of the overall market turnover. Central Pharmaceuticals Limited (+8.8%) was the most traded share with a turnover of BDT 332 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,250.47	6,247.57	+2.90	+0.05%	+0.7%
DS30	2,112.82	2,113.52	-0.70	-0.03%	-3.8%
DSES	1,359.64	1,359.05	+0.59	+0.04%	+0.1%
CDSET	1,206.41	1,206.19	+0.22	+0.02%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	90	63	182	335
A Category (Equity)	48	44	118	210
B Category (Equity)	33	18	52	103
N Category (Equity)	1	0	0	1
Z Category (Equity)	8	1	12	21
Mutual Funds	5	0	19	24
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,735,979	7,730,624	+0.1%
	Mn USD	70,168	70,119	
Turnover	Mn BDT	5,290	4,600	+15.0%
	Mn USD	48	42	
Volume	Mn Shares	158	135	+17.0%
No. of Trade		154,675	144,755	+6.9%

* Average Interbank Exchange Rate is BDT 110.25 as of Dec 06, 2023

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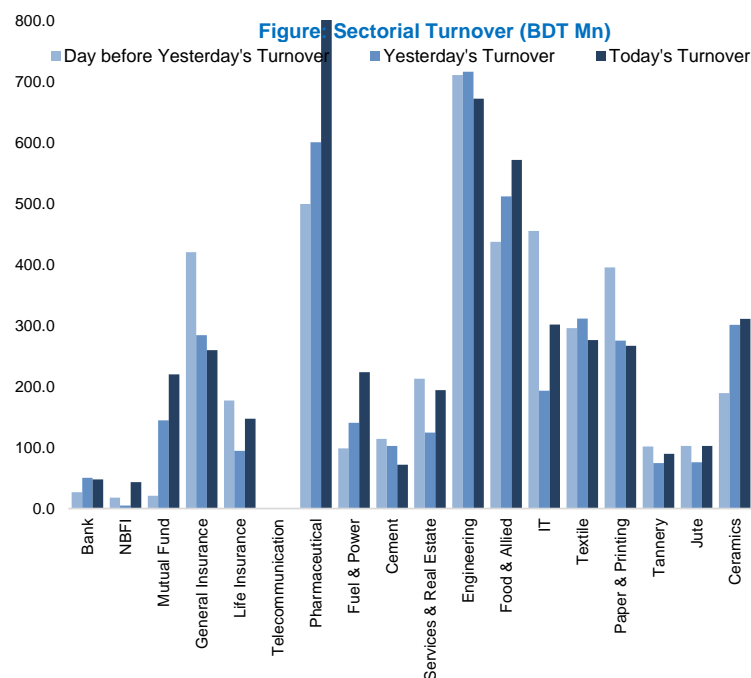
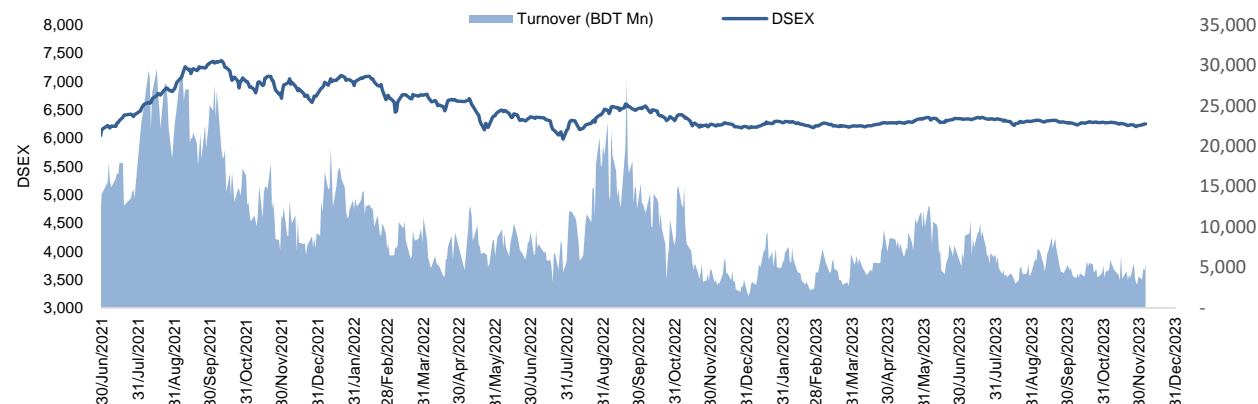
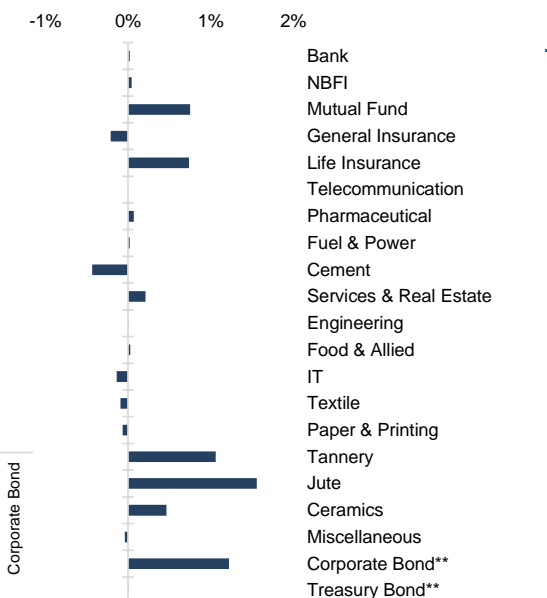


Figure: Sectorial Mcap Change



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	1,442	+0.29	+0.02%	35	680,382	8.8%	47.9	1.0%	12.4x	0.7x	GP	386,996	8.6%	0.2	12.5x	6.4x
NBFI	1,918	1,917	+0.86	+0.04%	23	186,673	2.4%	43.5	0.9%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	840	833	+6.26	+0.75%	37	39,708	0.5%	219.9	4.4%	NM	0.8x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,461	3,468	-7.24	-0.21%	42	101,122	1.3%	259.8	5.2%	18.8x	1.6x	SQURPHARMA	185,977	4.1%	26.3	9.5x	1.5x
Life Insurance	2,611	2,592	+19.19	+0.74%	15	72,973	0.9%	147.3	2.9%	NM	NM	ROBI	157,138	3.5%	0.2	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%	0.1	66.1x	4.4x
Pharmaceutical	3,714	3,711	+2.57	+0.07%	33	717,897	9.3%	809.6	16.2%	19.5x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,699	1,699	+0.37	+0.02%	23	448,154	5.8%	223.9	4.5%	42.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,542	2,553	-11.05	-0.43%	7	122,081	1.6%	71.9	1.4%	17.4x	2.6x	LHBL	80,948	1.8%	48.8	12.7x	3.8x
Services & Real Estate	1,749	1,745	+3.70	+0.21%	8	69,107	0.9%	194.1	3.9%	22.7x	0.9x	BERGERPBL	79,612	1.8%	2.1	25.8x	6.3x
Engineering	4,516	4,516	+0.03	+0.00%	42	530,435	6.9%	672.3	13.5%	26.9x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,223	21,218	+5.81	+0.03%	21	392,713	5.1%	571.9	11.5%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,900	2,904	-4.02	-0.14%	11	37,806	0.5%	301.7	6.0%	29.9x	2.5x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,657	1,659	-1.53	-0.09%	58	171,595	2.2%	276.4	5.5%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,247	10,253	-6.70	-0.07%	6	39,479	0.5%	266.9	5.3%	59.7x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,120	3,087	+32.80	+1.06%	6	35,321	0.5%	89.9	1.8%	58.1x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	17,999	17,723	+276.28	+1.56%	3	4,403	0.1%	102.9	2.1%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	710	707	+3.29	+0.47%	5	32,846	0.4%	311.3	6.2%	55.1x	2.0x	UNILEVERCL	38,772	0.9%	1.4	39.2x	18.7x
Miscellaneous	4,175	4,177	-1.53	-0.04%	14	227,334	2.9%	381.9	7.6%	26.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,156	4,106	+50.22	+1.22%	12	41,383	0.5%	0.9	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	238	3,185,672	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
STANCERAM	172.8	+10.0%	79.6	NM	NM	SQURPHARMA	121,499	7.0%	9.5x	1.5x	CENTRALPHL	22.3	+8.8%	331.6	NM	4.0x
SAMATALETH	72.8	+10.0%	40.1	NM	5.1x	BATBC	74,086	4.3%	15.4x	5.7x	ADVENT	25.5	+9.4%	246.5	25.5x	1.7x
CAPITECGBF	13.3	+9.9%	51.1	NM	1.3x	BEXIMCO	69,196	4.0%	34.2x	1.2x	FUWANGFOO	31.7	+2.6%	238.8	NM	12.1x
1STPRIMFMF	19.5	+9.6%	97.7	NM	1.8x	RENATA	68,042	3.9%	66.1x	4.4x	KPPL	28.8	+0.3%	174.7	NM	NM
ADVENT	25.5	+9.4%	246.5	25.5x	1.7x	BXPBARMA	45,564	2.6%	13.8x	1.4x	BDTHAI	19.1	+0.5%	118.0	NM	0.7x
CENTRALPHL	22.3	+8.8%	331.6	NM	4.0x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	MONNOCERA	116.1	-0.1%	117.3	39.9x	1.4x
HAKKANIPUL	68.7	+6.0%	36.9	50.5x	3x	GP	38,700	2.2%	12.5x	6.4x	SKTRIMS	31.5	+1.6%	115.8	27.9x	2.0x
ISNLTD	57.4	+5.7%	46.9	NM	19.0x	BRACBANK	30,964	1.8%	7.7x	0.9x	FUWANGCER	19.6	+2.1%	114.4	75.4x	1.6x
OAL	13.1	+5.6%	71.7	NM	1.2x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	AFTABAUTO	34.3	-3.9%	112.3	NM	0.7x
UNIONCAP	8.1	+5.2%	16.9	NM	NM	LHBL	28,562	1.6%	12.7x	3.8x	YPL	30.5	-	112.0	NM	5.7x

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)
LIBRAINFU	1,488.6	-4.5%	51.1	NM	1.2x	NBL	19,116	1.1%	NM	0.9x	SQURPHARMA	209.7	206.0	46.0	231	48.05
AFTABAUTO	34.3	-3.9%	112.3	NM	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	EMERALDOIL	110.0	94.8	5.0	376	37.98
GEMINISEA	555.3	-3.1%	45.6	49.4x	21.3x	OLYMPIC	16,066	0.9%	17.6x	2.7x	SEAPEARL	162.5	156.0	5.0	235	37.60
PDL	13.3	-2.9%	99.3	NM	1.0x	ROBI	15,714	0.9%	52.6x	2.4x	ACMELAB	80.2	76.6	40.0	303	23.72
DESHBANDHU	36.7	-2.9%	41.4	61.2x	1.9x	ALARABANK	14,357	0.8%	12.5x	1.1x	ACMEPL	31.9	31.9	12.0	409	13.06
MONNOAGML	558.1	-2.8%	17.0	NM	3.2x	BSRMLTD	14,210	0.8%	5.2x	0.6x	EIL	30.5	30.5	1.0	318	9.70
GENEXIL	68.4	-2.7%	87.8	24.4x	3.4x	SEAPEARL	13,733	0.8%	28.2x	9.5x	NAHEEACP	64.3	58.8	3.0	140	8.89
STYLECRAFT	84.1	-2.4%	1.7	NM	8.3x	UPGDCL	13,547	0.8%	19.6x	4.1x	BRACBANK	34.2	33.0	5.0	265	8.87
NFML	16.9	-2.3%	30.7	NM	1.4x	PRIMEBANK	13,491	0.8%	4.9x	0.7x	ORIONINFU	373.8	373.8	1.0	19	7.14
ORIONINFU	337.0	-2.2%	65.2	NM	22.6x						NBL	8.0	8.0	7.0	860	6.88

* 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	209.7	206.0	48.1	231	46
EMERALDOIL	110.0	94.8	38.0	376	5
SEAPPEARL	162.5	156.0	37.6	235	5
ACMELAB	80.2	76.6	23.7	303	40
ACMEPL	31.9	31.9	13.1	409	12
EIL	30.5	30.5	9.7	318	1
NAHEEACP	64.3	58.8	8.9	140	3
BRACBANK	34.2	33.0	8.9	265	5
ORIONINFU	373.8	373.8	7.1	19	1
NBL	8.0	8.0	6.9	860	7
SILVAPHL	21.6	19.5	6.0	284	2
PREMIERCEM	60.0	58.0	5.9	99	2
LHBL	76.7	70.0	5.3	72	2
QUASEMIND	52.9	52.9	3.8	72	2
PROVATIINS	58.9	53.1	3.7	64	3
IPDC	52.0	52.0	3.1	60	1
KBPPWBIL	75.9	68.0	2.9	40	2
EBL	28.7	28.7	2.9	100	1
GSPFINANCE	27.4	27.4	2.7	98	1
ISLAMICFIN	17.8	17.8	2.7	150	3
AIBL1STIMF	6.7	6.6	2.7	400	3
SONALIPAPR	615.7	614.9	2.6	4	2
Total			295.3		213

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SALAMCRST		0.0%	5%	Record Date	7-Dec-23
SONALIANSH		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
MPETROLEUM		0.0%	160%	Record Date	11-Dec-23
MAKSONSPIN		0.0%	0%	Record Date	12-Dec-23
ECABLES		0.0%	3%	Record Date	13-Dec-23
JAMUNAOIL		0.0%	130%	Record Date	14-Dec-23
RINGSHINE		0.0%	0%	Record Date	17-Dec-23

Important DSE News

DESCO

The company has informed that the Board of Directors of the company in its meeting held on 05 December 2023 recommended some special resolutions for adoption of the shareholders in next Annual General Meeting in order to issue Preference Shares against GOB equity. a. Clause III(c)(8)(v) of Memorandum of Association and Clause 8 of Articles of Association of the company: Proposed: The Authorized Shares Capital of the Company is only. Tk. 2000,00,00,000 divided into 50,00,00,000 ordinary shares amounting Tk. 500,00,00,000 of Tk. 10 each and 150,00,00,000 preference shares amounting Tk. 1,500,00,00,000 of Tk. 10 each. b. Resolved that the consent of the members of the company be and is hereby accorded for issuance of the 60,76,93,513 nos of Irredeemable Non-Cumulative Preference Share of Tk. 10 each amounting. Tk. 607,69,35,130 in favour of Secretary, Power Division, Ministry of Power, Energy and Mineral Resources (MPEMR), Government of Bangladesh with following dividend rate against GoB Equity as per letter Power Division, MPEMR under memo no-27.00.0000.088.36.002.20.648 Dated- 11/09/2023 subject to approval of the Bangladesh Securities and Exchange Commission (BSEC) and complying with relevant laws and rules etc.

DHAKABANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Dhaka Bank PLC.' instead of 'Dhaka Bank Limited' with effect from December 07, 2023. Other things (except name) will remain unchanged.

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