

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 2.09 points and closed at 6,252.56. The blue-chip index DS30 (+0.12%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (+0.10%) closed at 2,115.27, 1,360.73, and 1,207.65 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.18% followed by Fuel & Power (+0.09%), Engineering (+0.04%), Pharmaceutical (+0.02%), Bank (+0.01%), Telecommunication (0.00%), and NBFI (-0.02%), respectively. Block trades contributed 6.3% of the overall market turnover. Central Pharmaceuticals Limited (-0.9%) was the most traded share with a turnover of BDT 257 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,252.56	6,250.47	+2.09	+0.03%	+0.7%
DS30	2,115.27	2,112.82	+2.45	+0.12%	-3.6%
DSES	1,360.73	1,359.64	+1.09	+0.08%	+0.1%
CDSET	1,207.65	1,206.41	+1.24	+0.10%	-0.6%

	Advanced	Declined	Unchanged	Total
All Category	58	92	160	310
A Category (Equity)	35	52	106	193
B Category (Equity)	18	34	43	95
N Category (Equity)	0	1	0	1
Z Category (Equity)	5	5	11	21
Mutual Funds	2	2	18	22
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,739,087	7,735,979	+0.0%
	Mn USD	70,196	70,168	
Turnover	Mn BDT	4,502	5,290	-14.9%
	Mn USD	41	48	
Volume	Mn Shares	129	158	-18.0%
No. of Trade		138,101	154,675	-10.7%

\* Average Interbank Exchange Rate is BDT 110.25 as of Dec 07, 2023

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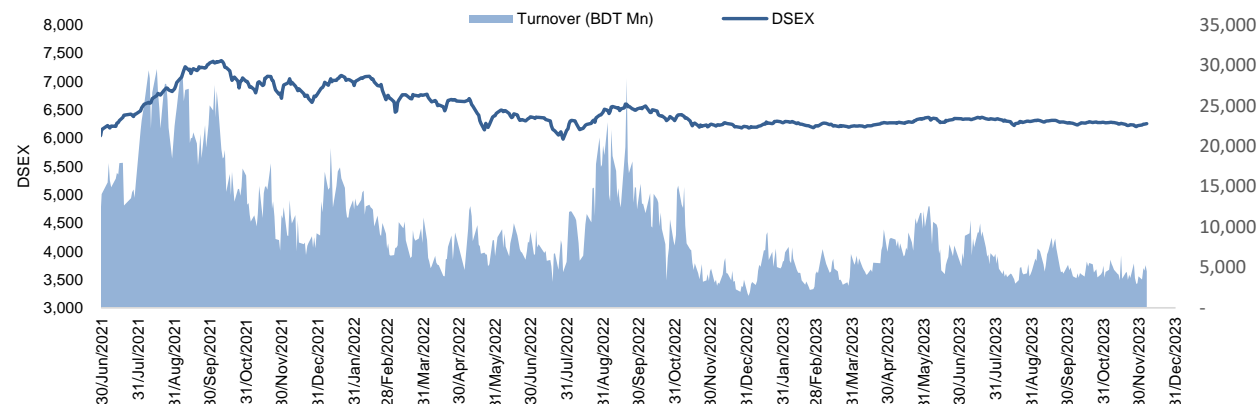
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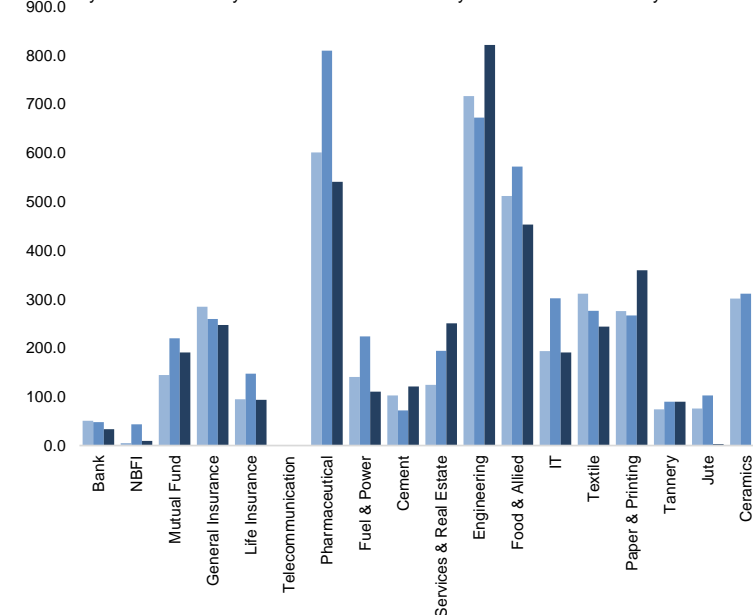
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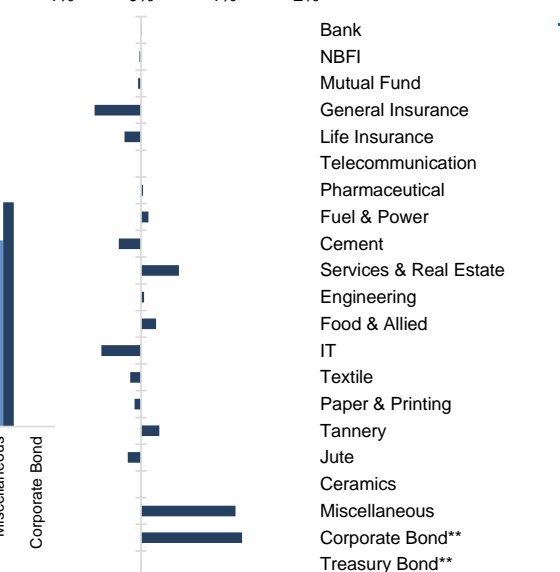
**Figure: Sectorial Turnover (BDT Mn)**

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover



**Figure: Sectorial Mcap Change**

-1% 0% 1% 2%



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	+0.12	+0.01%	35	680,441	8.8%	33.4	0.8%	12.4x	0.7x	GP	386,996	8.6%	0.4	12.5x	6.4x
NBFI	1,918	1,918	-0.33	-0.02%	23	186,641	2.4%	9.6	0.2%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	839	840	-0.29	-0.03%	37	39,695	0.5%	191.1	4.5%	NM	0.8x	BATBC	280,098	6.2%	0.5	15.4x	5.7x
General Insurance	3,441	3,461	-19.48	-0.56%	42	100,553	1.3%	247.2	5.9%	18.7x	1.6x	SQURPHARMA	185,977	4.1%	46.7	9.5x	1.5x
Life Insurance	2,606	2,611	-5.17	-0.20%	15	72,828	0.9%	93.8	2.2%	NM	NM	ROBI	157,138	3.5%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.5	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,715	3,714	+0.86	+0.02%	33	718,063	9.3%	540.7	12.8%	19.6x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,701	1,699	+1.52	+0.09%	23	448,556	5.8%	110.3	2.6%	44.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,533	2,540	-6.83	-0.27%	7	121,753	1.6%	121.3	2.9%	17.2x	2.6x	BERGERPBL	81,927	1.8%	7.2	26.5x	6.5x
Services & Real Estate	1,757	1,749	+8.05	+0.46%	8	69,425	0.9%	250.6	5.9%	22.8x	0.9x	LHBL	80,948	1.8%	80.2	12.7x	3.8x
Engineering	4,518	4,516	+1.76	+0.04%	42	530,642	6.9%	821.3	19.5%	26.9x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,262	21,223	+39.06	+0.18%	21	393,436	5.1%	453.0	10.7%	19.8x	6.9x	BXPHERMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,886	2,900	-13.89	-0.48%	11	37,625	0.5%	190.9	4.5%	29.7x	2.5x	BRACBANK	57,596	1.3%	0.1	7.7x	0.9x
Textile	1,655	1,657	-2.18	-0.13%	58	171,369	2.2%	243.8	5.8%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,239	10,247	-7.87	-0.08%	6	39,449	0.5%	359.3	8.5%	59.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,127	3,120	+6.97	+0.22%	6	35,400	0.5%	90.0	2.1%	58.3x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	17,970	17,999	-28.74	-0.16%	3	4,396	0.1%	3.1	0.1%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	710	710	-	-	5	32,846	0.4%	0.0	0.0%	55.1x	2.0x	UNILEVERCL	38,898	0.9%	2.2	39.3x	18.8x
Miscellaneous	4,223	4,175	+47.74	+1.14%	14	229,933	3.0%	460.0	10.9%	26.3x	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%	0.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	238	3,185,753	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
SKTRIMS	34.6	+9.8%	196.1	30.6x	2.2x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	CENTRALPHL	22.1	-0.9%	257.0	NM	4.0x
AZIZPIPES	135.7	+9.5%	133.2	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	KPPL	31.2	+8.3%	217.3	NM	NM
KPPL	31.2	+8.3%	217.3	NM	NM	BEXIMCO	69,196	4.0%	34.2x	1.2x	SEAPPEARL	179.4	+3.2%	207.9	29.1x	9.8x
1STPRIMFMF	20.9	+7.2%	46.9	NM	2.0x	RENATA	68,042	3.9%	66.1x	4.4x	SKTRIMS	34.6	+9.8%	196.1	30.6x	2.2x
GEMINISEA	583.7	+5.1%	58.5	51.9x	22.3x	BXPHERMA	45,564	2.6%	13.8x	1.4x	YPL	31.9	+4.6%	158.2	NM	6.0x
BANGAS	128.1	+4.9%	47.3	NM	6.1x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	AZIZPIPES	135.7	+9.5%	133.2	NM	NM
MEGHNA PET	40.6	+4.9%	4.5	NM	NM	GP	38,700	2.2%	12.5x	6.4x	FUWANGFOOI	31.1	-1.9%	114.7	NM	11.9x
YPL	31.9	+4.6%	158.2	NM	6.0x	BRACBANK	30,964	1.8%	7.7x	0.9x	BDTHAI	19.3	+1.0%	104.3	NM	0.7x
DOMINAGE	16.9	+4.3%	71.5	NM	1.0x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	AFTABAUTO	35.3	+2.9%	101.6	NM	0.7x
ARAMITCEM	24.5	+4.3%	11.2	NM	NM	LHBL	28,562	1.6%	12.7x	3.8x	EMERALDOIL	100.8	-2.3%	96.0	50.9x	NM

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)
ETL	10.0	-4.8%	30.2	21.7x	0.8x	NBL	19,116	1.1%	NM	0.9x	SQURPHARMA	209.4	208.2	48.0	246	51.49
LIBRAINFU	1,435.1	-3.6%	32.1	NM	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	SEAPPEARL	183.2	156.6	9.0	269	43.62
SHYAMPSUG	180.0	-3.5%	7.1	NM	NM	OLYMPIC	16,066	0.9%	17.9x	2.8x	CONTININS	43.0	43.0	1.0	969	41.68
EASTERNINS	64.2	-3.0%	22.0	22.8x	1.2x	ROBI	15,714	0.9%	52.6x	2.4x	ACMEPL	35.0	31.9	16.0	672	21.61
IMAMBUTTON	196.0	-2.8%	6.3	NM	71.5x	ALARABANK	14,357	0.8%	12.5x	1.1x	EMERALDOIL	112.5	92.9	5.0	201	21.29
UNIONINS	57.0	-2.6%	30.3	20.4x	2.9x	BSRMLTD	14,210	0.8%	5.2x	0.6x	NBL	8.0	8.0	11.0	1,100	8.80
RUPALILIFE	104.0	-2.5%	14.7	NM	NM	SEAPPEARL	13,733	0.8%	29.1x	9.8x	PROVATIINS	58.5	58.0	2.0	136	7.94
WMSHIPYARD	11.8	-2.5%	28.0	NM	0.6x	UPGDCL	13,547	0.8%	19.6x	4.1x	ACMELAB	86.5	77.0	7.0	95	7.81
EMERALDOIL	100.8	-2.3%	96.0	50.9x	NM	PRIMEBANK	13,491	0.8%	4.9x	0.7x	DESHBANDHU	36.7	36.7	1.0	160	5.87
CROWNCEMNT	75.7	-2.3%	0.9	11.1x	1.4x						FINEFOODS	131.5	131.5	1.0	38	5.00

\* 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	209.4	208.2	51.5	246	48
SEAPPEARL	183.2	156.6	43.6	269	9
CONTINIINS	43.0	43.0	41.7	969	1
ACMEPL	35.0	31.9	21.6	672	16
EMERALDOIL	112.5	92.9	21.3	201	5
NBL	8.0	8.0	8.8	1,100	11
PROVATIINS	58.5	58.0	7.9	136	2
ACMELAB	86.5	77.0	7.8	95	7
DESHBANDHU	36.7	36.7	5.9	160	1
FINEFOODS	131.5	131.5	5.0	38	1
PRAGATIINS	60.0	60.0	4.5	75	1
ISLAMICFIN	19.8	17.8	4.2	225	2
GP	261.6	261.6	4.0	15	3
SINGERBD	144.0	138.8	3.8	27	3
NAVANAPHAR	76.5	76.5	3.7	49	1
SONALIPAPR	615.2	615.0	3.3	5	2
CNATEX	9.9	9.2	3.2	346	3
CVOPRL	172.4	172.4	2.9	17	1
GSPFINANCE	27.6	27.6	2.7	99	1
RUPALILIFE	116.6	116.6	2.3	20	1
SPCL	64.8	60.9	2.3	36	2
ROBI	27.0	27.0	2.0	72	1
<b>Total</b>			<b>281.9</b>		<b>161</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SILCOPHL		0.0%	3%	Record Date	18-Dec-23
POWERGRID		0.0%	10%	Record Date	19-Dec-23
AFTABAUTO		0.0%	10%	Record Date	19-Dec-23
ARGONDENIM		0.0%	0%	Record Date	20-Dec-23
SAMATALETH		0.0%	0%	Record Date	20-Dec-23
INTRACO		0.0%	10%	Record Date	22-Dec-23
ZAHEENSPIN		0.0%	0%	Record Date	26-Dec-23
EPGL		0.0%	5%	Record Date	27-Dec-23
JUTESPINN		0.0%	0%	Record Date	28-Dec-23

#### Important DSE News

##### EPGL

The Board of Directors has recommended 5% Cash Dividend only for General Shareholders (excluding Sponsors and Directors) for the year ended June 30, 2023. The Sponsors and Directors hold 110,179,705 shares out of total 190,163,216 shares of the company and Cash Dividend payable to the General Shareholders is Tk. 39,991,756. Record date: 27.12.2023. The Company has also reported EPS of Tk. (2.36) (Consolidated), NAV per share (with revaluation) of Tk. 43.18 (Separate), NAV per share (without revaluation) of Tk. 31.28 (Separate) and NOCFPS of Tk. 3.15 (Separate) for the year ended June 30, 2023 as against Tk. 0.51 (Consolidated), Tk. 48.18 (Consolidated), Tk. 34.09 (Consolidated) and Tk. (5.48) (Consolidated) respectively for the year ended June 30, 2022. EPS was Tk. 0.75 in FY 22-23 as against Tk. 1.13 in FY 21-22.

##### CONFIDCEM

**(Q1 Un-audited):** Consolidated EPS was Tk. 2.27 for July-September 2023 as against Tk. 1.60 (restated) for July-September 2022; Consolidated NOCFPS was Tk. (2.84) for July-September 2023 as against Tk. (2.50) for July-September 2022; Consolidated NAV per share was Tk. 72.17 as on September 30, 2023 and Tk. 69.89 as on June 30, 2023.

##### ALLTEX

The company has informed that the Board of Directors of the company in its meeting held on December 06, 2023 has decided to acquire reconditioned textile dyeing and finishing machinery for production of knitting fabrics to produce inner wear. The purchase price of the machine will be borne from company's own sources. After installation of the machinery the production of the company will increase by 12 MT per day (3,600 MT annually) with a potential increase of annual turnover by BDT 190 Crore approximately. The project will commence operation from 1 March 2024.

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