

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 1.27 points and closed at 6,251.29. The blue-chip index DS30 (-0.13%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (-0.06%) closed at 2,112.47, 1,360.44, and 1,206.96 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.08%, followed by Fuel & Power (+0.04%), Bank (+0.01%), Telecommunication (+0.00%), NBF1 (-0.01%), Engineering (-0.02%), and Food & Allied (-0.13%), respectively. Block trades contributed 6.6% of the overall market turnover. Central Pharmaceuticals Limited (+10.0%) was the most traded share with a turnover of BDT 334 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,251.29	6,252.56	-1.27	-0.02%	+0.7%
DS30	2,112.47	2,115.27	-2.80	-0.13%	-3.8%
DSES	1,360.44	1,360.73	-0.28	-0.02%	+0.1%
CDSET	1,206.96	1,207.65	-0.69	-0.06%	-0.6%

	Advanced	Declined	Unchanged	Total
All Category	56	100	173	329
A Category (Equity)	25	65	121	211
B Category (Equity)	26	29	47	102
N Category (Equity)	1	0	0	1
Z Category (Equity)	4	6	5	15
Mutual Funds	3	1	20	24
Corporate Bonds	0	0	1	1
Treasury Bonds	1	1	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,736,994	7,739,087	-0.0%
	Mn USD	70,177	70,196	
Turnover	Mn BDT	5,379	4,502	+19.5%
	Mn USD	49	41	
Volume	Mn Shares	167	129	+29.3%
	No. of Trade	156,291	138,101	

* Average Interbank Exchange Rate is BDT 110.25 as of Dec 10, 2023

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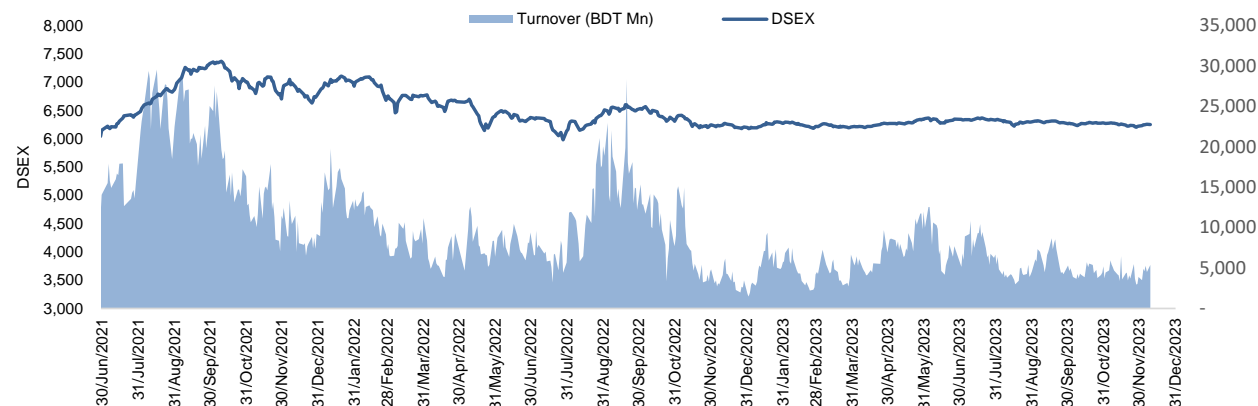


Figure: Sectorial Turnover (BDT Mn)

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

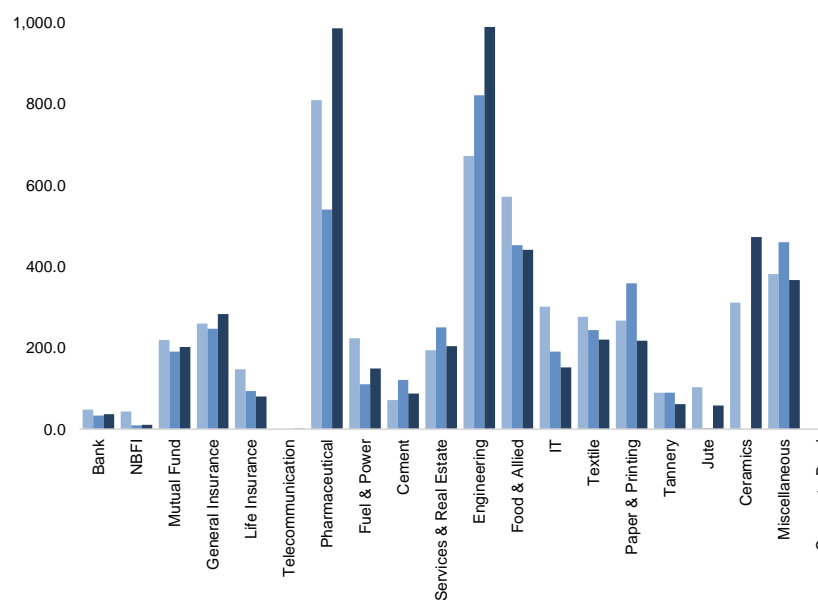
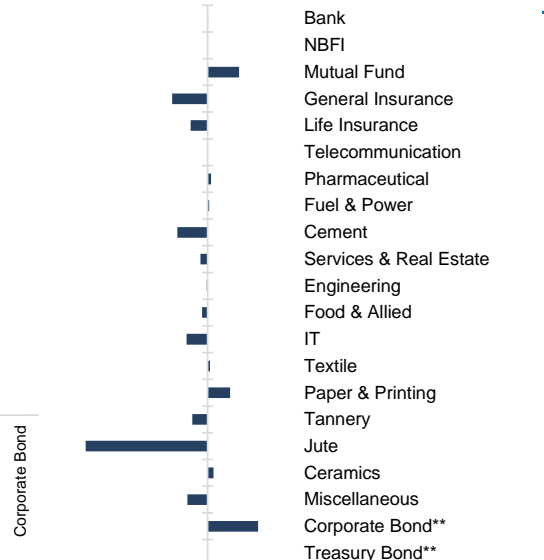


Figure: Sectorial Mcap Change

-4% -2% 0% 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	1,443	1,442	+0.17	+0.01%	35	680,523	8.8%	36.7	0.7%	12.4x	0.7x	GP	386,996	8.6%	0.5	12.5x	6.4x
NBFI	1,918	1,918	-0.18	-0.01%	23	186,624	2.4%	11.0	0.2%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	846	839	+6.42	+0.76%	37	39,998	0.5%	202.5	4.0%	NM	0.8x	BATBC	280,098	6.2%	0.8	15.4x	5.7x
General Insurance	3,412	3,441	-29.49	-0.86%	42	99,692	1.3%	283.0	5.6%	18.5x	1.6x	SQRPHARMA	185,977	4.1%	27.1	9.5x	1.5x
Life Insurance	2,595	2,606	-10.73	-0.41%	15	72,528	0.9%	80.4	1.6%	NM	NM	ROBI	157,138	3.5%	0.7	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	1.2	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,718	3,715	+3.06	+0.08%	33	718,653	9.3%	986.1	19.6%	19.6x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,701	1,701	+0.62	+0.04%	23	448,719	5.8%	149.7	3.0%	44.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,516	2,535	-18.52	-0.73%	7	120,863	1.6%	87.7	1.7%	17.1x	2.6x	BERGERPBL	80,813	1.8%	5.8	26.2x	6.4x
Services & Real Estate	1,754	1,757	-3.04	-0.17%	8	69,305	0.9%	204.2	4.1%	22.8x	0.9x	LHBL	79,786	1.8%	71.6	12.6x	3.7x
Engineering	4,517	4,518	-1.10	-0.02%	42	530,513	6.9%	989.5	19.7%	26.9x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,235	21,262	-27.81	-0.13%	21	392,921	5.1%	441.2	8.8%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,871	2,886	-14.60	-0.51%	11	37,435	0.5%	152.1	3.0%	29.6x	2.5x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,656	1,655	+0.90	+0.05%	58	171,462	2.2%	220.3	4.4%	NM	1.2x	BEACONPHAR	56,595	1.3%	1.5	86.9x	9.0x
Paper & Printing	10,294	10,239	+55.57	+0.54%	6	39,663	0.5%	218.0	4.3%	59.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,115	3,127	-11.60	-0.37%	6	35,268	0.5%	61.6	1.2%	58.1x	3.3x	DUTCHBANGL	44,203	1.0%	0.2	8.0x	1.0x
Jute	17,439	17,970	-531.02	-2.96%	3	4,266	0.1%	58.3	1.2%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	711	710	+1.00	+0.14%	5	32,893	0.4%	472.9	9.4%	55.2x	2.0x	UNILEVERCL	39,032	0.9%	2.3	39.5x	18.8x
Miscellaneous	4,202	4,223	-20.59	-0.49%	14	228,812	3.0%	366.8	7.3%	26.2x	1.8x	POWERGRID	37,347	0.8%	0.8	NM	0.3x
Corporate Bond**	4,207	4,156	+50.83	+1.22%	12	41,383	0.5%	0.4	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	238	3,185,860	41.3%	1.3	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CAPITECBGF	14.3	+10.0%	75.1	NM	1.4x
CENTRALPHL	24.3	+10.0%	334.2	NM	4.4x
BDTHAI	21.2	+9.8%	212.2	NM	0.8x
FUWANGCER	21.5	+9.7%	268.5	82.7x	1.8x
1STPRIMFMF	22.9	+9.6%	48.7	NM	2.2x
CAPMIBLMF	13.0	+9.2%	21.5	NM	1.4x
IBP	18.5	+8.8%	119.9	NM	1x
KPPL	33.7	+8.0%	182.2	NM	NM
DOMINAGE	18.2	+7.7%	114.3	NM	1.1x
AMBEEPHA	916.1	+7.5%	17.1	NM	88.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	121,499	7.0%	9.5x	1.5x
BATBC	74,086	4.3%	15.4x	5.7x
BEXIMCO	69,196	4.0%	34.2x	1.2x
RENATA	68,042	3.9%	66.1x	4.4x
BXPBARMA	45,564	2.6%	13.8x	1.4x
BEACONPHAR	39,617	2.3%	86.9x	9.0x
GP	38,700	2.2%	12.5x	6.4x
BRACBANK	30,964	1.8%	7.7x	0.9x
ISLAMIBANK	29,927	1.7%	8.5x	0.7x
LHBL	28,562	1.6%	12.6x	3.7x
PUBALIBANK	19,162	1.1%	4.1x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	17.8x	2.8x
ROBI	15,714	0.9%	52.6x	2.4x
ALARABANK	14,357	0.8%	12.5x	1.1x
BSRMLTD	14,210	0.8%	5.2x	0.6x
SEAPPEARL	13,733	0.8%	29.3x	9.8x
UPGDCL	13,547	0.8%	19.6x	4.1x
PRIMEBANK	13,491	0.8%	4.9x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CENTRALPHL	24.3	+10.0%	334.2	NM	4.4x
FUWANGCER	21.5	+9.7%	268.5	82.7x	1.8x
ADVENT	27.0	+5.1%	220.2	27.0x	1.8x
BDTHAI	21.2	+9.8%	212.2	NM	0.8x
YPL	33.4	+4.7%	183.8	NM	6.2x
KPPL	33.7	+8.0%	182.2	NM	NM
MONNOCERA	110.4	-4.9%	157.3	37.9x	1.4x
FUWANGFOOL	31.0	-0.3%	148.7	NM	11.9x
SKTRIMS	34.5	-0.3%	137.5	30.5x	2.2x
SEAPPEARL	180.3	+0.5%	120.3	29.3x	9.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAMORITA	85.5	-9.0%	51.7	NM	1.5x
SAMATALETH	68.2	-7.3%	19.3	NM	5x
GQBALLPEN	152.0	-5.2%	42.1	NM	1.3x
MONNOCERA	110.4	-4.9%	157.3	37.9x	1.4x
GPHISPAT	42.7	-4.7%	0.3	20.9x	0.8x
EMERALDOIL	96.5	-4.3%	74.3	48.7x	NM
AZIZPIPES	130.5	-3.8%	56.2	NM	NM
SONALIANSH	611.3	-3.8%	57.1	81.0x	5.0x
MEGHNAPEP	39.1	-3.7%	4.0	NM	NM
MIRACLEIND	41.0	-3.5%	30.9	NM	2.5x

* 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)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPPEARL	174.5	165.0	14.0	343	57.49
SQRPHARMA	209.5	208.2	39.0	231	48.27
EMERALDOIL	110.7	91.0	10.0	332	35.78
SONALIPAPR	615.1	615.1	2.0	36	22.39
NAVANAPHAR	94.0	81.0	2.0	255	22.02
BSCCL	236.6	218.8	2.0	52	12.33
ISNLTD	56.3	51.0	4.0	198	11.01
SILVAPHL	20.3	19.5	14.0	507	9.93
ACMEPL	32.0	31.9	4.0	301	9.61
PRAGATIINS	60.0	60.0	1.0	150	9.00

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	174.5	165.0	57.5	343	14
SQRPHARMA	209.5	208.2	48.3	231	39
EMERALDOIL	110.7	91.0	35.8	332	10
SONALIPAPR	615.1	615.1	22.4	36	2
NAVANAPHAR	94.0	81.0	22.0	255	2
BSCCL	236.6	218.8	12.3	52	2
ISNLTD	56.3	51.0	11.0	198	4
SILVAPHL	20.3	19.5	9.9	507	14
ACMEPL	32.0	31.9	9.6	301	4
PRAGATIINS	60.0	60.0	9.0	150	1
DELTALIFE	149.4	122.9	8.4	58	16
ARGONDENIM	18.2	18.2	8.4	459	1
INDEXAGRO	103.6	93.3	6.6	65	7
PRAGATILIF	108.0	108.0	6.1	57	1
BRACBANK	34.5	32.6	5.2	152	4
FORTUNE	72.0	68.6	5.1	71	2
MEGHNALIFE	80.0	80.0	4.0	50	1
EIL	30.5	30.5	3.8	123	1
IPDC	62.3	62.3	3.7	60	1
EBL	28.4	28.4	3.7	130	2
TITASGAS	36.9	36.9	3.7	100	1
KBPPWBIL	70.1	70.1	3.5	50	2
Total			354.2		192

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

MONNOCERA

(Q1 Un-audited): EPS was Tk. 0.74 for July-September 2023 as against Tk. 0.04 for July-September 2022; NOCFPS was Tk. 0.23 for July-September 2023 as against Tk. 0.56 for July-September 2022; NAV per share was Tk. 81.04 as on September 30, 2023 and Tk. 80.29 as on June 30, 2023.

SAIFPOWER

The company has informed that Board of Directors of the company has taken decision to invest in Innovative Logistics & Shipping Limited (ILSL). The initial investment in this regard would be Taka 25,500,000.00 (Two Crore Fifty-Five Lac) only and in this investment, Saif Powertec limited will be the parent company and Innovative Logistics & Shipping Limited (ILSL) will be subsidiary company by holding 51% stake in the subsidiary.

MERCINS

The company has informed that the Board of Directors has elected Mr. Md. Nabiullah as the Chairman of the company.

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