

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.01%) lost 0.48 points and closed at 6,263.87. The blue-chip index DS30 (-0.29%), the Shariah-based index DSES (+0.03%), and the large-cap index CDSET (-0.16%) closed at 2,110.66, 1,364.72, and 1,205.62 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.14%, followed by Pharmaceutical (+0.07%), NBF1 (+0.01%), Telecommunication (+0.00%), Food & Allied (-0.06%), Bank (-0.09%), and Fuel & Power (-0.18%), respectively. Block trades contributed 6.2% of the overall market turnover. Central Pharmaceuticals Limited (+5.5%) was the most traded share with a turnover of BDT 324 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,263.87	6,264.35	-0.48	-0.01%	+0.9%
DS30	2,110.66	2,116.86	-6.20	-0.29%	-3.9%
DSES	1,364.72	1,364.36	+0.36	+0.03%	+0.4%
CDSET	1,205.62	1,207.60	-1.98	-0.16%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	75	83	185	343
A Category (Equity)	37	56	122	215
B Category (Equity)	34	23	48	105
N Category (Equity)	0	1	1	2
Z Category (Equity)	4	3	14	21
Mutual Funds	3	1	22	26
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,741,871	7,743,832	-0.0%
	Mn USD	70,221	70,239	
Turnover	Mn BDT	6,013	5,918	+1.6%
	Mn USD	55	54	
Volume	Mn Shares	211	190	+11.3%
No. of Trade		165,430	174,975	-5.5%

* Average Interbank Exchange Rate is BDT 110.25 as of Dec 12, 2023

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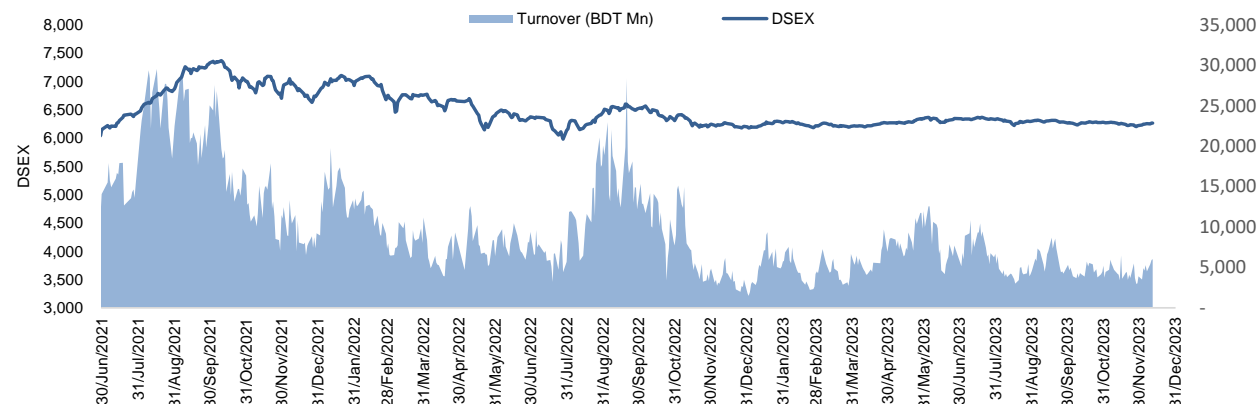


Figure: Sectorial Turnover (BDT Mn)

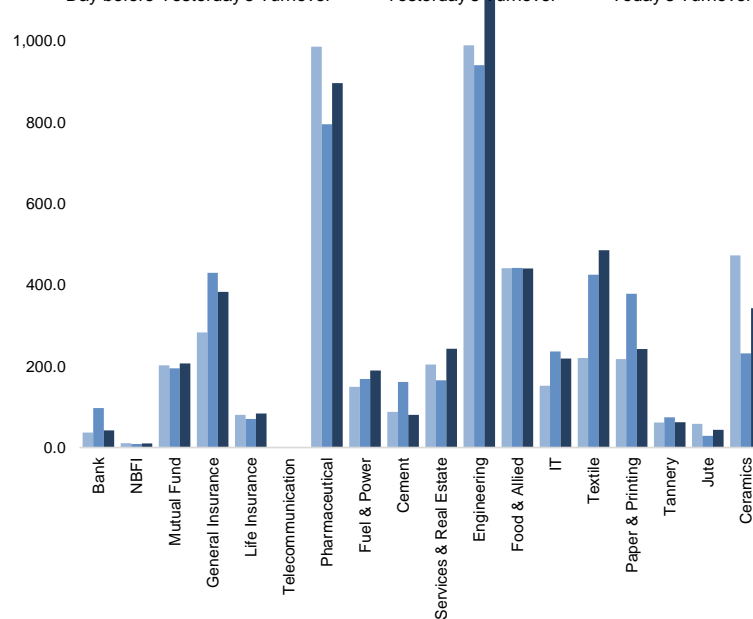
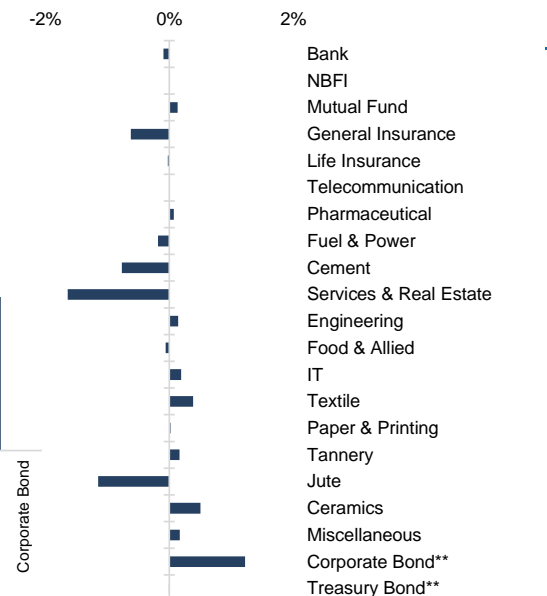


Figure: Sectorial Mcap Change



Market PE 19.5x

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	1,445	-1.36	-0.09%	35	680,830	8.8%	42.2	0.7%	12.4x	0.7x	GP	386,996	8.5%	0.2	12.5x	6.4x
NBFI	1,918	1,918	+0.12	+0.01%	23	186,684	2.4%	10.3	0.2%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	842	841	+1.12	+0.13%	37	39,833	0.5%	207.2	3.7%	NM	0.8x	BATBC	280,098	6.2%	0.2	15.4x	5.7x
General Insurance	3,457	3,479	-21.54	-0.62%	42	101,022	1.3%	383.0	6.8%	18.8x	1.6x	SQURPHARMA	185,977	4.1%	13.9	9.5x	1.5x
Life Insurance	2,600	2,601	-0.65	-0.02%	15	72,678	0.9%	83.8	1.5%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.3	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,724	3,721	+2.72	+0.07%	33	719,743	9.3%	896.8	15.9%	19.6x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,699	1,702	-3.07	-0.18%	23	448,057	5.8%	189.4	3.4%	44.7x	1.1x	BEXIMCO	103,571	2.3%	1.5	34.2x	1.2x
Cement	2,535	2,555	-19.54	-0.76%	7	121,762	1.6%	80.4	1.4%	17.2x	2.6x	BERGERPBL	80,674	1.8%	8.8	26.1x	6.4x
Services & Real Estate	1,732	1,761	-28.87	-1.64%	8	68,436	0.9%	243.1	4.3%	22.5x	0.9x	LHBL	80,251	1.8%	51.3	12.6x	3.8x
Engineering	4,525	4,519	+6.49	+0.14%	42	531,472	6.9%	1,288.8	22.9%	27.0x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,248	21,261	-12.51	-0.06%	21	393,176	5.1%	441.0	7.8%	19.8x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,919	2,913	+5.63	+0.19%	11	38,049	0.5%	218.8	3.9%	30.1x	2.5x	BRACBANK	57,596	1.3%	0.5	7.7x	0.9x
Textile	1,667	1,661	+6.41	+0.39%	58	172,637	2.2%	485.2	8.6%	NM	1.2x	BEACONPHAR	56,595	1.2%	0.1	86.9x	9.0x
Paper & Printing	9,007	9,005	+1.90	+0.02%	6	39,729	0.5%	242.6	4.3%	60.0x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,120	3,115	+5.17	+0.17%	6	35,321	0.5%	62.3	1.1%	58.1x	3.3x	DUTCHBANGL	44,203	1.0%	0.2	8.0x	1.0x
Jute	30,939	31,298	-359.09	-1.15%	3	7,569	0.1%	43.4	0.8%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	715	712	+3.59	+0.50%	5	33,075	0.4%	342.6	6.1%	55.5x	2.0x	UNILEVERCL	39,000	0.9%	1.7	39.4x	18.8x
Miscellaneous	4,217	4,209	+7.19	+0.17%	14	229,587	3.0%	377.6	6.7%	26.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,259	4,207	+51.45	+1.22%	12	41,383	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.5	12.1x	0.9x
Treasury Bond**	86	86	-0.00	-0.01%	238	3,184,570	41.2%	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	191.4	+10.0%	51.7	NM	NM	SQURPHARMA	121,499	7.0%	9.5x	1.5x	CENTRALPHL	24.8	+5.5%	323.9	NM	4.5x
ANLIMAYARN	40.3	+9.8%	77.4	NM	3.9x	BATBC	74,086	4.3%	15.4x	5.7x	OAL	16.2	+9.5%	301.3	NM	1.5x
GQBALLPEN	161.8	+9.8%	55.3	NM	1.4x	BEXIMCO	69,196	4.0%	34.2x	1.2x	FUWANGCER	21.5	+0.9%	202.2	82.7x	1.8x
OAL	16.2	+9.5%	301.3	NM	1.5x	RENATA	68,042	3.9%	66.1x	4.4x	ADVENT	27.0	+3.4%	189.7	27.0x	1.8x
WMSHIPYARD	13.6	+7.1%	119.2	NM	0.7x	BXPBARMA	45,564	2.6%	13.8x	1.4x	PDL	14.9	+6.4%	181.3	NM	1.1x
AZIZPIPES	139.1	+7.1%	108.8	NM	NM	BEACONPHAR	39,617	2.3%	86.9x	9.0x	BDTHAI	21.4	-	163.3	NM	0.8x
AIL	82.4	+6.7%	44.4	42.5x	3x	GP	38,700	2.2%	12.5x	6.4x	KPPL	31.5	+1.3%	161.0	NM	NM
PDL	14.9	+6.4%	181.3	NM	1.1x	BRACBANK	30,964	1.8%	7.7x	0.9x	DOMINAGE	19.6	+5.9%	161.0	NM	1.1x
LIBRAINFU	1,488.2	+6.2%	39.7	NM	1.2x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	SEAPEARL	168.1	-4.4%	146.1	27.3x	9.1x
DOMINAGE	19.6	+5.9%	161.0	NM	1.1x	LHBL	28,562	1.6%	12.6x	3.8x	YPL	31.8	+0.3%	138.6	NM	5.9x

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)
SEAPEARL	168.1	-4.4%	146.1	27.3x	9.1x	NBL	19,116	1.1%	NM	0.9x	DBH1STMF	6.9	6.9	1.0	6,528	45.04
MPETROLEUM	198.6	-4.4%	3.2	4.9x	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	GREENDELME	6.9	6.9	1.0	5,259	36.29
CLICL	54.5	-2.7%	3.8	NM	NM	OLYMPIC	16,066	0.9%	17.8x	2.8x	LRGLOBMF1	6.4	6.4	1.0	4,979	31.87
EASTERNINS	65.2	-2.5%	29.2	23.2x	1.3x	ROBI	15,714	0.9%	52.6x	2.4x	ACMEPL	31.9	31.9	14.0	905	28.88
SKTRIMS	35.9	-2.4%	95.9	31.8x	2.3x	ALARABANK	14,357	0.8%	12.5x	1.1x	SEAPEARL	179.9	177.1	4.0	160	28.40
CENTRALINS	36.9	-2.4%	2.1	20.4x	0.7x	BSRMLTD	14,210	0.8%	5.2x	0.6x	SQURPHARMA	209.3	208.6	24.0	121	25.36
MEGHNAINS	34.2	-2.3%	5.9	14.7x	2.4x	SEAPEARL	13,733	0.8%	27.3x	9.1x	SINOBANGLA	68.3	67.9	7.0	294	19.95
EMERALDOIL	98.7	-2.3%	88.1	49.8x	NM	UPGDCL	13,547	0.8%	19.6x	4.1x	EMERALDOIL	111.1	111.1	2.0	150	16.69
SAMATALETH	69.1	-2.3%	23.3	NM	4.8x	PRIMEBANK	13,491	0.8%	4.9x	0.7x	BEACONPHAR	245.0	223.6	9.0	54	12.77
CRYSTALINS	84.7	-2.2%	18.8	27.7x	3.4x						AIL	81.0	78.0	3.0	151	12.10

* 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
DBH1STMF	6.9	6.9	45.0	6,528	1
GREENELMF	6.9	6.9	36.3	5,259	1
LRGLOBMF1	6.4	6.4	31.9	4,979	1
ACMEPL	31.9	31.9	28.9	905	14
SEAPPEARL	179.9	177.1	28.4	160	4
SQURPHARMA	209.3	208.6	25.4	121	24
SINOBANGLA	68.3	67.9	19.9	294	7
EMERALDOIL	111.1	111.1	16.7	150	2
BEACONPHAR	245.0	223.6	12.8	54	9
AIL	81.0	78.0	12.1	151	3
BEACHHATCH	49.3	47.0	7.3	151	3
ISNLTD	56.7	56.6	6.6	116	2
BXPHERMA	145.5	131.6	6.4	47	6
SILVAPHL	19.5	19.5	6.3	321	4
STANDARINS	55.0	54.8	6.0	110	2
AOL	32.9	32.9	4.6	140	1
UNIONBANK	8.2	8.1	4.6	566	7
AZIZPIPES	133.0	133.0	3.4	25	1
QUASEMIND	52.7	52.7	3.3	63	1
IBNSINA	272.0	272.0	3.0	11	1
SSSTEEL	15.0	15.0	2.8	185	5
MERCANBANK	12.0	12.0	2.7	227	5
Total			373.8		178

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
TOSRIFA		2.0%	0%	Record Date	II be notified la

Important DSE News

FEKDIL

Refer to their earlier news disseminated by DSE on 23.10.2023 regarding dividend declaration, the company has further informed that the Board of Directors has approved the revised Audited Financial Statements for the year ended June 30, 2023 and only the particulars as revised are given below: EPS of Tk. 1.58, NAV per share of Tk. 19.63 and NOCFPS of Tk. 1.43 for the year ended June 30, 2023 (revised as on 11.12.2023) as against Tk. 1.04, Tk. 19.14 and Tk. 2.19 respectively for the year ended June 30, 2022 (revised as on 11.12.2023).

SAMORITA

Dr. A. B. M. Haroon, one of the Sponsor Directors of the company, has expressed his intention to sell 1,00,000 shares out of his holding of 14,75,621 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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