

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.06%) gained 3.98 points and closed at 6,266.85. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.12%), and the large-cap index CDSET (+0.12%) closed at 2,107.12, 1,364.66, and 1,206.38 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.16% followed by Bank (+0.13%), Food & Allied (+0.08%), NBF1 (+0.06%), Engineering (+0.05%), Telecommunication (0.00%), and Fuel & Power (-0.02%), respectively. Block trades contributed 5.5% of the overall market turnover. Olympic Accessories Limited (+6.7%) was the most traded share with a turnover of BDT 300 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,266.85	6,262.87	+3.98	+0.06%	+1.0%
DS30	2,107.12	2,105.43	+1.69	+0.08%	-4.0%
DSES	1,364.66	1,363.02	+1.64	+0.12%	+0.4%
CDSET	1,206.38	1,204.93	+1.45	+0.12%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	63	111	164	338
A Category (Equity)	28	72	109	209
B Category (Equity)	28	35	44	107
N Category (Equity)	0	1	1	2
Z Category (Equity)	7	3	10	20
Mutual Funds	4	0	20	24
Corporate Bonds	0	1	2	3
Treasury Bonds	2	1	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,745,789	7,742,165	+0.0%
	Mn USD	70,257	70,224	
Turnover	Mn BDT	4,811	7,697	-37.5%
	Mn USD	44	70	
Volume	Mn Shares	174	251	-30.7%
No. of Trade		148,021	213,704	-30.7%

* Average Interbank Exchange Rate is BDT 110.25 as of Dec 14, 2023

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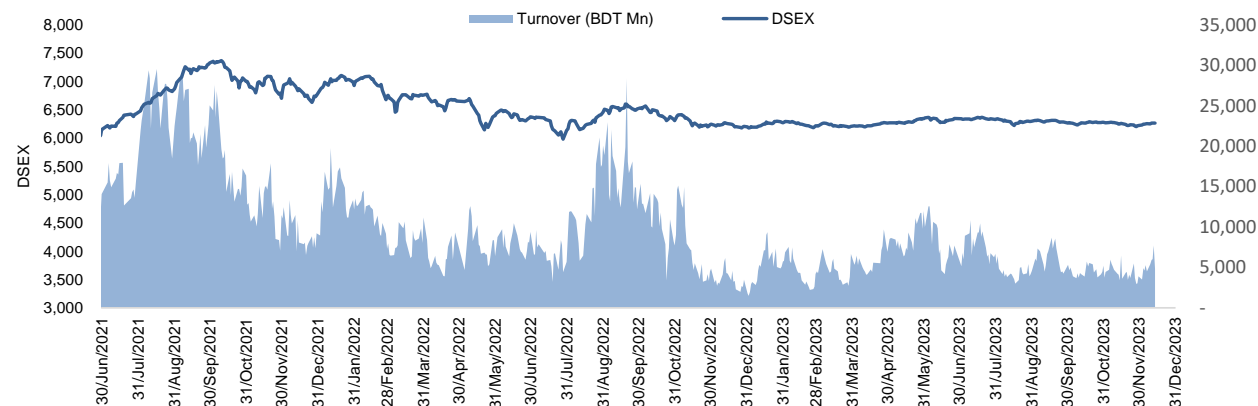


Figure: Sectorial Turnover (BDT Mn)

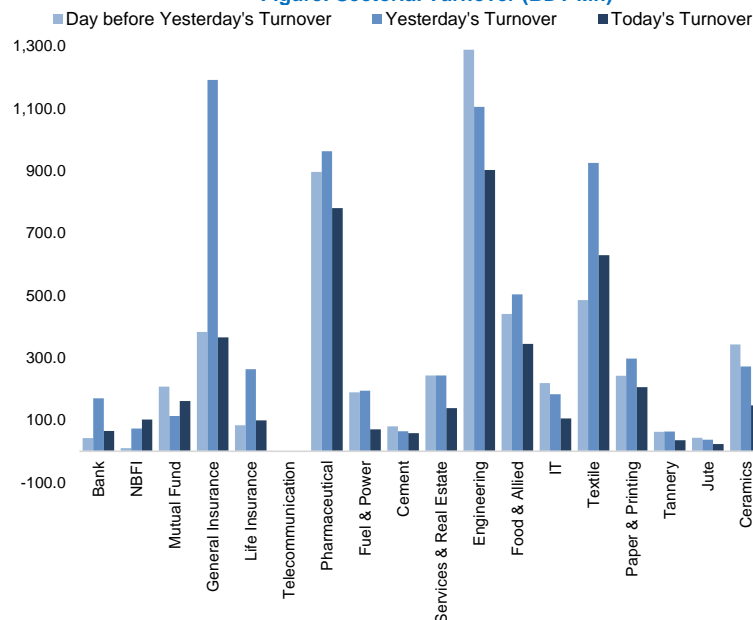
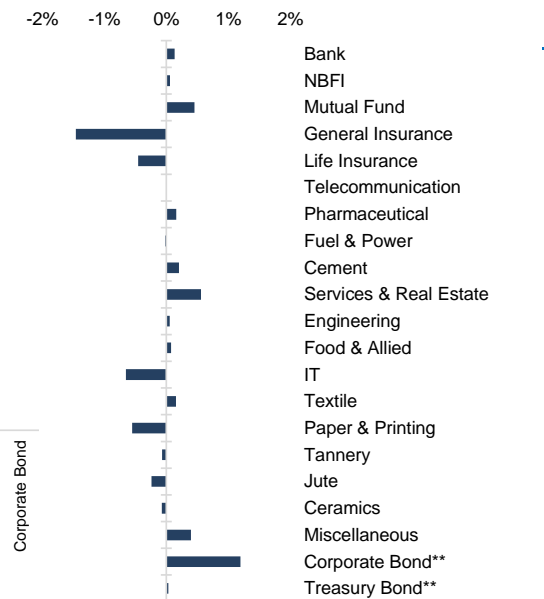


Figure: Sectorial Mcap Change



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	1,448	1,446	+1.94	+0.13%	35	682,984	8.8%	65.4	1.4%	12.4x	0.7x	GP	386,996	8.5%	0.4	12.5x	6.4x
NBFI	1,922	1,921	+1.18	+0.06%	23	187,052	2.4%	101.7	2.2%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	843	839	+3.80	+0.45%	37	39,866	0.5%	161.1	3.5%	NM	0.8x	BATBC	280,098	6.2%	0.3	15.4x	5.7x
General Insurance	3,508	3,559	-51.93	-1.46%	42	102,491	1.3%	365.9	8.1%	19.0x	1.6x	SQURPHARMA	185,977	4.1%	18.9	9.5x	1.5x
Life Insurance	2,612	2,624	-11.94	-0.45%	15	73,020	0.9%	99.5	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	3,730	3,724	+6.03	+0.16%	33	722,237	9.3%	780.7	17.2%	19.7x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,697	1,697	-0.30	-0.02%	23	447,304	5.8%	70.5	1.6%	44.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,529	2,524	+5.11	+0.20%	7	121,116	1.6%	57.8	1.3%	17.1x	2.6x	BERGERPBL	80,702	1.8%	1.9	26.1x	6.4x
Services & Real Estate	1,704	1,695	+9.46	+0.56%	8	67,326	0.9%	138.1	3.0%	22.1x	0.9x	LHBL	80,135	1.8%	30.5	12.6x	3.8x
Engineering	4,521	4,519	+2.47	+0.05%	42	531,522	6.9%	902.5	19.9%	27.0x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,220	21,204	+16.25	+0.08%	21	392,660	5.1%	344.3	7.6%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,876	2,895	-18.80	-0.65%	11	37,499	0.5%	105.7	2.3%	29.6x	2.5x	BRACBANK	57,596	1.3%	0.7	7.7x	0.9x
Textile	1,674	1,672	+2.59	+0.16%	58	173,406	2.2%	628.9	13.8%	NM	1.2x	BEACONPHAR	56,595	1.2%	0.0	86.9x	9.0x
Paper & Printing	8,842	8,890	-48.97	-0.55%	6	39,001	0.5%	205.5	4.5%	58.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.1	8.5x	0.7x
Tannery	3,113	3,115	-2.07	-0.07%	6	35,579	0.5%	35.1	0.8%	58.6x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	31,158	31,232	-74.13	-0.24%	3	4,281	0.1%	23.6	0.5%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	705	706	-0.51	-0.07%	5	32,621	0.4%	146.8	3.2%	54.8x	1.9x	UNILEVERCL	38,913	0.9%	1.7	39.3x	18.8x
Miscellaneous	4,238	4,221	+16.70	+0.40%	14	230,741	3.0%	310.6	6.8%	26.4x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,310	4,259	+51.03	+1.20%	12	41,373	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.03	+0.04%	238	3,185,513	41.2%	1.2	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
1STPRIMFMF	23.1	+10.0%	87.9	NM	2.2x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	OAL	19.0	+6.7%	300.2	NM	1.7x
SHYAMPSUG	203.9	+10.0%	18.1	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	PDL	16.2	+8.7%	279.7	NM	1.2x
KBPPWBIL	95.5	+9.1%	63.6	NM	8.0x	BEXIMCO	69,196	4.0%	34.2x	1.2x	ORIONINFU	364.1	+0.2%	233.4	NM	24.4x
PDL	16.2	+8.7%	279.7	NM	1.2x	RENATA	68,042	3.9%	66.1x	4.4x	CENTRALPHL	22.9	+1.3%	231.4	NM	4.1x
UNIONCAP	9.5	+8.0%	50.7	NM	NM	BXPBARMA	45,564	2.6%	13.8x	1.4x	KPPL	28.3	-1.4%	146.0	NM	NM
AZIZPIPES	141.9	+7.6%	71.6	NM	NM	BEACONPHAR	39,617	2.3%	86.9x	9.0x	WMSHIPYARD	14.3	+5.1%	120.2	NM	0.8x
IBP	19.2	+7.3%	80.7	NM	1x	GP	38,700	2.2%	12.5x	6.4x	YPL	31.3	+3.3%	108.7	NM	5.9x
OAL	19.0	+6.7%	300.2	NM	1.7x	BRACBANK	30,964	1.8%	7.7x	0.9x	BDTHAI	19.6	-1.0%	88.8	NM	0.7x
ZEALBANGLA	149.2	+6.4%	2.8	NM	NM	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	1STPRIMFMF	23.1	+10.0%	87.9	NM	2.2x
ETL	12.0	+6.2%	80.0	26.1x	0.9x	LHBL	28,562	1.6%	12.6x	3.8x	FUWANGCER	20.2	+0.5%	83.0	77.7x	1.7x

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)
AMBEEPHA	871.7	-5.5%	21.3	NM	84.4x	NBL	19,116	1.1%	NM	0.9x	ORIONPHARM	72.1	71.8	4.0	688	49.54
SINOBANGLA	66.1	-5.3%	35.7	38.6x	2x	CITYBANK	18,190	1.0%	5.2x	0.7x	SQURPHARMA	209.5	208.7	36.0	188	39.32
SONARGAON	34.2	-5.3%	12.4	NM	1.8x	OLYMPIC	16,066	0.9%	17.9x	2.8x	EMERALDOIL	103.0	85.0	2.0	169	15.00
ANLIMAYARN	42.5	-4.1%	68.9	NM	4.1x	ROBI	15,714	0.9%	52.6x	2.4x	LHBL	62.1	62.1	4.0	232	14.43
RAHIMTEXT	141.1	-3.7%	1.0	NM	5.9x	ALARABANK	14,357	0.8%	12.5x	1.1x	ACMEPL	31.9	31.9	11.0	447	14.26
PARAMOUNT	54.9	-3.7%	7.0	45.0x	2.1x	BSRMLTD	14,210	0.8%	5.2x	0.6x	BEACHHATCH	45.2	45.2	2.0	235	10.62
CRYSTALINS	86.4	-3.6%	13.2	28.2x	3.4x	SEAPEARL	13,733	0.8%	26.1x	8.7x	AFCAGRO	23.0	22.5	2.0	349	7.90
KAY&QUE	217.8	-3.2%	3.5	NM	2.9x	UPGDCL	13,547	0.8%	19.6x	4.1x	FINEFOODS	130.0	130.0	1.0	55	7.15
ICICL	31.5	-3.1%	10.6	28.4x	1.9x	PRIMEBANK	13,491	0.8%	5.0x	0.7x	SONALILIFE	80.5	80.5	1.0	84	6.76
REPUBLIC	41.9	-3.0%	12.8	20.9x	2.3x						BEXIMCO	105.0	104.2	2.0	60	6.28

* 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
ORIONPHARM	72.1	71.8	49.5	688	4
SQURPHARMA	209.5	208.7	39.3	188	36
EMERALDOIL	103.0	85.0	15.0	169	2
LHBL	62.1	62.1	14.4	232	4
ACMEPL	31.9	31.9	14.3	447	11
BEACHHATCH	45.2	45.2	10.6	235	2
AFCAGRO	23.0	22.5	7.9	349	2
FINEFOODS	130.0	130.0	7.2	55	1
SONALILIFE	80.5	80.5	6.8	84	1
BEXIMCO	105.0	104.2	6.3	60	2
PREMIERCEM	53.0	53.0	6.1	116	3
PRAGATILIF	109.0	109.0	5.7	53	1
AL-HAJTEX	132.2	130.0	5.6	43	3
BRACBANK	34.5	33.1	5.5	162	7
GSPFINANCE	27.5	27.5	5.4	198	1
ISNLTD	57.3	57.3	4.3	75	1
ROBI	27.0	27.0	4.0	149	2
RENATA	1,200.0	1,141.8	3.7	3	3
HRTEX	114.9	114.9	3.6	31	1
MPETROLEUM	195.0	181.1	3.3	18	2
CONFIDCEM	89.0	89.0	3.2	36	1
BDTHAI	21.0	21.0	3.0	142	1
Total			265.8		149

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

SHAHJABANK

Refer to their earlier news disseminated by DSE on 08.05.2022 regarding Issuance of SJIBL 3rd Mudaraba Subordinated Bond, the company has further informed that BSEC has accorded consent under the provisions of the Securities and Exchange Commission (Private Placement of Debt Securities) Rules. 2021 for raising of Tier 2 capital of Shahjalal Islami Bank PLC. through issuance of 7 years Redeemable SJIBL 3rd Mudaraba Floating Rate, Non-Convertible, Unsecured Subordinated Bond of BDT 500.00 crore only divided into 5,000 bond of Tk. 1.00 million each at par through private placement. The purpose of the proposed bond is to strengthen the capital base of the Bank.

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