

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.16%) gained 9.86 points and closed at 6,261.03. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.29%), and the large-cap index CDSET (-0.01%) closed at 2,099.21, 1,366.71, and 1,205.81 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.31%, followed by Pharmaceutical (+0.23%), Engineering (+0.05%), Telecommunication (+0.00%), Fuel & Power (-0.02%), NBFI (-0.04%), and Bank (-0.06%), respectively. Block trades contributed 6.8% of the overall market turnover. Orion Infusion Ltd. (+8.7%) was the most traded share with a turnover of BDT 277 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,261.03	6,251.17	+9.86	+0.16%	+0.9%
DS30	2,099.21	2,097.54	+1.66	+0.08%	-4.4%
DSES	1,366.71	1,362.80	+3.91	+0.29%	+0.6%
CDSET	1,205.81	1,205.90	-0.09	-0.01%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	93	68	180	341
A Category (Equity)	50	35	127	212
B Category (Equity)	40	25	40	105
N Category (Equity)	0	1	0	1
Z Category (Equity)	3	7	13	23
Mutual Funds	7	0	22	29
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,740,551	7,736,608	+0.1%
	Mn USD	70,369	70,333	
Turnover	Mn BDT	5,218	4,649	+12.2%
	Mn USD	47	42	
Volume	Mn Shares	187	182	+2.9%
No. of Trade		143,101	141,688	+1.0%

* Average Interbank Exchange Rate is BDT 110.00 as of Dec 19, 2023

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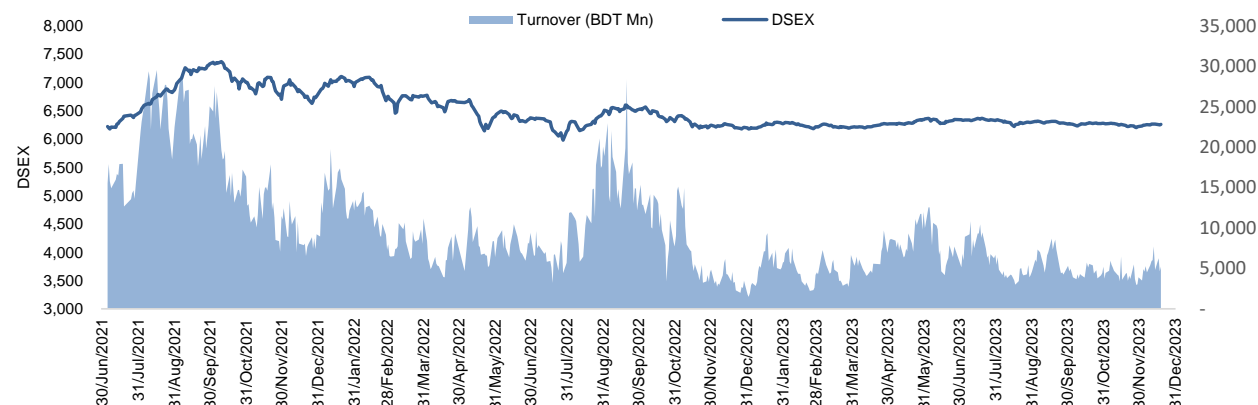


Figure: Sectorial Turnover (BDT Mn)

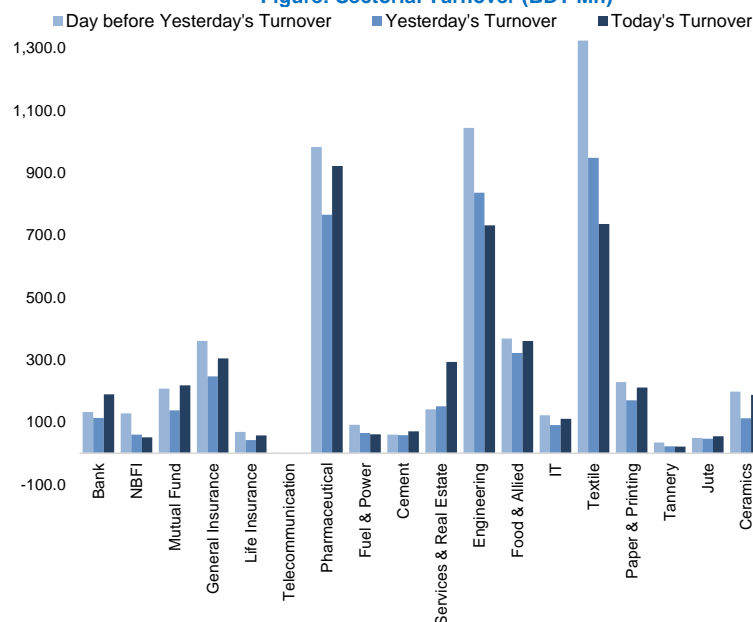
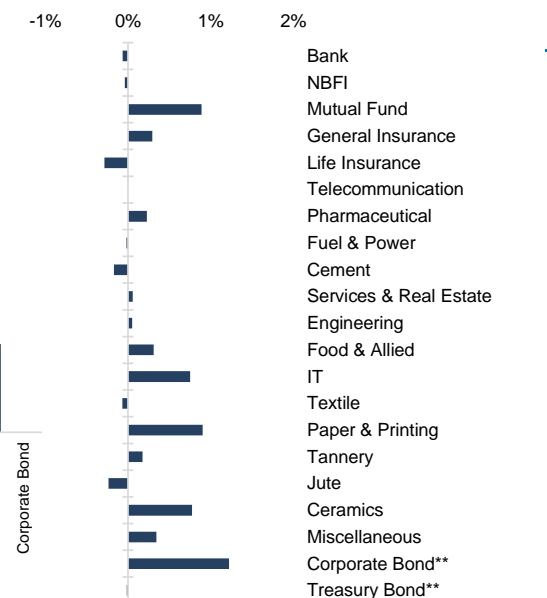


Figure: Sectorial Mcap Change



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	1,451	1,452	-0.94	-0.06%	35	684,565	8.9%	189.3	3.9%	12.5x	0.7x	GP	386,996	8.5%	0.4	12.5x	6.4x
NBFI	1,922	1,923	-0.73	-0.04%	23	187,021	2.4%	51.1	1.1%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	848	841	+7.50	+0.89%	37	40,108	0.5%	217.7	4.5%	NM	0.8x	BATBC	280,098	6.2%	0.5	15.4x	5.7x
General Insurance	3,451	3,441	+10.11	+0.29%	42	100,832	1.3%	304.5	6.3%	18.7x	1.6x	SQURPHARMA	185,977	4.1%	71.5	9.5x	1.5x
Life Insurance	2,581	2,589	-7.42	-0.29%	15	72,155	0.9%	57.3	1.2%	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	3,741	3,733	+8.52	+0.23%	33	723,173	9.4%	922.1	19.0%	19.7x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,690	1,691	-0.31	-0.02%	23	445,839	5.8%	60.8	1.3%	44.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,504	2,508	-4.30	-0.17%	7	120,367	1.6%	70.7	1.5%	17.0x	2.6x	BERGERPBL	80,419	1.8%	1.0	26.1x	6.4x
Services & Real Estate	1,627	1,626	+0.93	+0.06%	8	64,277	0.8%	292.8	6.0%	21.1x	0.8x	LHBL	79,902	1.8%	52.5	12.6x	3.7x
Engineering	4,524	4,522	+2.37	+0.05%	42	531,354	6.9%	731.4	15.0%	27.0x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,261	21,196	+65.55	+0.31%	21	393,418	5.1%	360.3	7.4%	19.8x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,856	2,835	+21.28	+0.75%	11	37,235	0.5%	110.8	2.3%	29.4x	2.4x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,676	1,677	-1.12	-0.07%	58	173,591	2.2%	736.2	15.1%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,111	10,021	+90.57	+0.90%	6	38,958	0.5%	210.8	4.3%	58.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,136	3,131	+5.48	+0.18%	6	35,508	0.5%	21.2	0.4%	58.5x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	17,482	17,524	-41.52	-0.24%	3	4,277	0.1%	54.8	1.1%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	704	699	+5.41	+0.77%	5	32,571	0.4%	187.5	3.9%	54.7x	1.9x	UNILEVERCL	38,990	0.9%	0.8	39.4x	18.8x
Miscellaneous	4,251	4,237	+14.56	+0.34%	14	231,474	3.0%	283.4	5.8%	26.5x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,362	4,310	+52.72	+1.22%	12	41,374	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	-0.01	-0.01%	238	3,184,435	41.2%	0.1	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
CENTRALPHL	24.3	+10.0%	268.7	NM	4.4x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	ORIONINFU	405.7	+8.7%	276.6	NM	27.2x
KPPL	31.0	+9.9%	156.0	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	CENTRALPHL	24.3	+10.0%	268.7	NM	4.4x
STANCERAM	186.3	+9.8%	81.5	NM	NM	BEXIMCO	69,196	4.0%	34.2x	1.2x	SEAPPEARL	137.2	-1.4%	245.4	22.3x	7.5x
1STPRIMFMF	28.0	+9.8%	58.8	NM	2.6x	RENATA	68,042	3.9%	66.1x	4.4x	OAL	18.7	-0.5%	244.3	NM	1.7x
ANLIMAYARN	46.1	+9.8%	79.1	NM	4.5x	BXPBARMA	45,564	2.6%	13.8x	1.4x	PDL	16.8	+0.6%	205.9	NM	1.2x
CAPMIBBLMF	13.9	+9.4%	20.1	NM	1.5x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	ETL	13.8	+0.7%	166.9	30.0x	1.1x
GLDNJMF	9.8	+8.9%	16.2	NM	1x	GP	38,700	2.2%	12.5x	6.4x	KPPL	31.0	+9.9%	156.0	NM	NM
ORIONINFU	405.7	+8.7%	276.6	NM	27.2x	BRACBANK	30,964	1.8%	7.7x	0.9x	IBP	20.6	+5.1%	110.5	NM	1.5x
SKTRIMS	34.1	+8.6%	80.4	30.2x	2.1x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	WMSHIPYARD	14.0	-0.7%	107.5	NM	0.7x
BDTHAI	19.7	+8.2%	77.2	NM	0.7x	LHBL	28,562	1.6%	12.6x	3.7x	EIL	37.2	+3.9%	98.3	32.1x	2.0x

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)
DELTASPINN	9.0	-4.3%	51.7	NM	0.7x	NBL	19,116	1.1%	NM	0.9x	SEAPPEARL	153.0	125.2	13.0	547	74.83
ZAHINTEX	9.1	-4.2%	19.4	NM	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	EMERALDOIL	85.0	74.7	8.0	588	47.70
FASFIN	5.4	-3.6%	12.2	NM	NM	OLYMPIC	16,066	0.9%	18.6x	2.9x	SQURPHARMA	228.1	209.6	4.0	162	34.21
ZAHEENSPIN	10.8	-3.6%	37.7	NM	2.2x	ROBI	15,714	0.9%	52.6x	2.4x	GSPFINANCE	30.0	30.0	1.0	570	17.10
ILFSL	5.6	-3.4%	9.7	NM	NM	ALARABANK	14,357	0.8%	12.5x	1.1x	QUASEMIND	61.9	52.8	4.0	301	16.37
GENNEXT	6.3	-3.1%	46.8	NM	0.5x	BSRMLTD	14,210	0.8%	5.2x	0.6x	ACMEPL	34.3	31.9	15.0	492	15.78
ZEALBANGLA	138.8	-2.3%	3.8	NM	NM	SEAPPEARL	13,733	0.8%	22.3x	7.5x	FINEFOODS	133.5	129.0	5.0	113	14.76
AMBEPPHA	873.4	-2.0%	7.9	NM	84.5x	UPGDCL	13,547	0.8%	19.6x	4.1x	EGEN	41.3	40.7	3.0	262	10.68
JUTESPINN	305.9	-2.0%	1.1	NM	NM	PRIMEBANK	13,491	0.8%	5.1x	0.7x	KBPPWBIL	102.0	95.2	2.0	85	8.40
CLICL	52.5	-1.9%	1.8	NM	NM						NBL	8.0	8.0	12.0	1,024	8.19

* 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
SEAPPEARL	153.0	125.2	74.8	547	13
EMERALDOIL	85.0	74.7	47.7	588	8
SQURPHARMA	228.1	209.6	34.2	162	4
GSPFINANCE	30.0	30.0	17.1	570	1
QUASEMIND	61.9	52.8	16.4	301	4
ACMEPL	34.3	31.9	15.8	492	15
FINEFOODS	133.5	129.0	14.8	113	5
EGEN	41.3	40.7	10.7	262	3
KBPPWBIL	102.0	95.2	8.4	85	2
NBL	8.0	8.0	8.2	1,024	12
NAVANAPHAR	93.0	92.9	8.0	86	2
ACMELAB	77.0	76.5	7.0	92	8
EBL	29.0	29.0	5.7	198	4
NLTUBES	78.8	78.8	5.6	71	1
BRACBANK	33.3	32.4	5.4	165	3
BEACONPHAR	223.6	223.6	5.4	24	6
CNATEX	9.4	9.2	5.0	543	9
EIL	36.8	35.0	4.6	127	3
ORIONPHARM	71.8	71.7	4.2	59	6
KPCL	26.6	26.6	3.6	137	2
IFIC	10.2	10.2	3.6	352	1
BATBC	518.5	479.8	3.5	7	5
Total			355.0		179

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

HAKKANIPUL

The company has informed that the Board of Directors of the Company in its meeting held on December 18, 2023 has decided to raise paid up capital through issuance of 70,00,000 and 90,00,000 ordinary shares of Tk. 10.00 each at par to the existing Sponsors and Directors and other than existing shareholders respectively totaling Tk. 16,00,00,000 (Sixteen Crore) against cash consideration subject to the approval of General Shareholders in the Extraordinary General Meeting (EGM), Bangladesh Securities and Exchange Commission and the compliance of other requirements embodied in relevant laws and regulatory authorities concerned. Purpose of the Issue: The fund through raising of capital shall be utilized to increase working capital and modification of the company for uninterrupted and smooth Operation. Information regarding EGM: Date and Time of EGM: 01.02.2024 at 11:00 AM. Venue: Digital Platform. Record date of the EGM: 09.01.2024.

GEMINISEA

Refer to the earlier news of the company disseminated by DSE on 15.11.2023 regarding record date for entitlement of stock dividend for the year ended June 30, 2023, the Company has further informed that Bangladesh Securities and Exchange Commission accorded its approval to the company for issuance of 75% Stock Dividend whereas the Board of the company initially recommended 100% Stock Dividend for the year ended June 30, 2023. The company also informed that the record date for entitlement of 75% Stock Dividend will be December 26, 2023.

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