

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.02%) gained 0.96 points and closed at 6,261.99. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (-0.04%) closed at 2,099.45, 1,367.44, and 1,205.36 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.14% followed by Bank (-0.04%), Pharmaceutical (-0.02%), Fuel & Power (-0.01%), NBFI (0.00%), Telecommunication (0.00%), and Engineering (+0.02%), respectively. Block trades contributed 5.7% of the overall market turnover. Olympic Accessories Limited (+9.6%) was the most traded share with a turnover of BDT 447 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,261.99	6,261.03	+0.96	+0.02%	+0.9%
DS30	2,099.45	2,099.21	+0.24	+0.01%	-4.4%
DSES	1,367.44	1,366.71	+0.73	+0.05%	+0.6%
CDSET	1,205.36	1,205.81	-0.45	-0.04%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	85	83	178	346
A Category (Equity)	59	41	122	222
B Category (Equity)	20	38	44	102
N Category (Equity)	1	0	0	1
Z Category (Equity)	5	4	12	21
Mutual Funds	19	0	18	37
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,741,357	7,740,551	
	Mn USD	70,376	70,369	+0.0%
Turnover	Mn BDT	6,894	5,218	+32.1%
	Mn USD	63	47	
Volume	Mn Shares	282	187	+50.6%
No. of Trade		174,670	143,101	+22.1%

\* Average Interbank Exchange Rate is BDT 110.00 as of Dec 20, 2023

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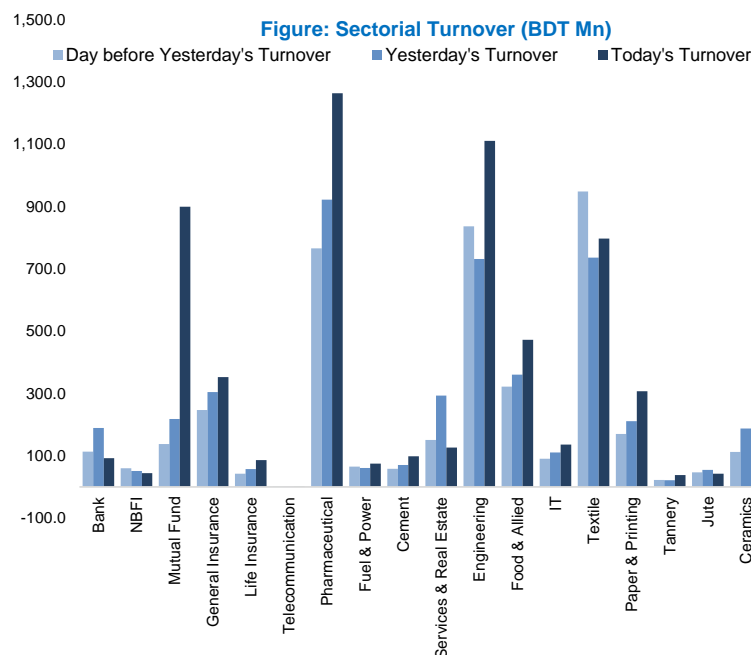
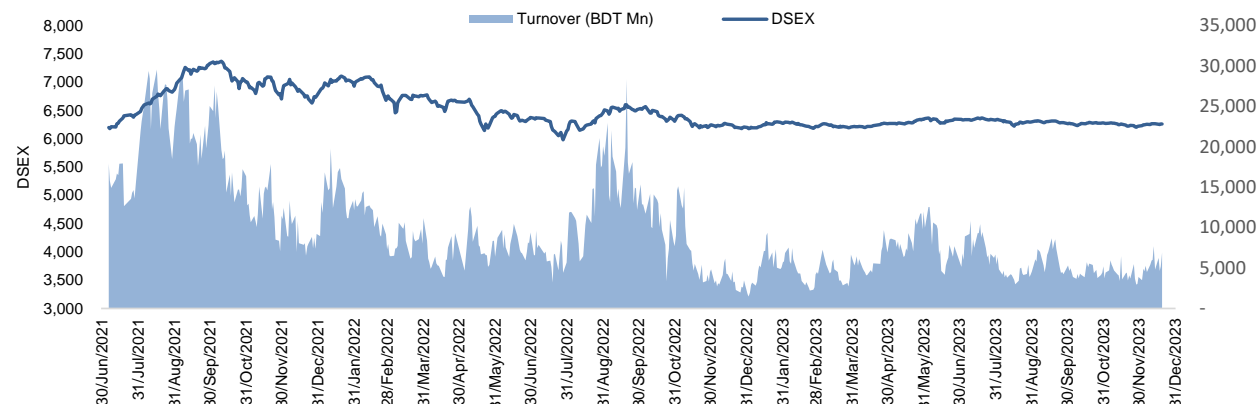
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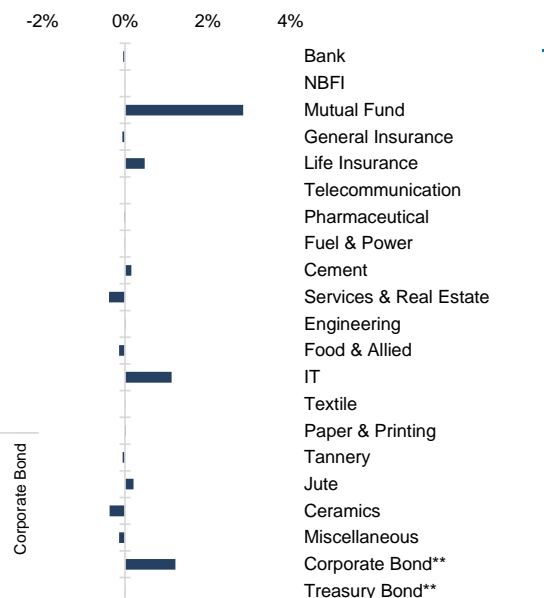
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**Figure: Sectorial Mcap Change**



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	1,451	-0.58	-0.04%	35	684,290	8.9%	92.3	1.4%	12.5x	0.7x	GP	386,996	8.5%	0.1	12.5x	6.4x
NBFI	1,922	1,922	-0.03	-0.00%	23	187,018	2.4%	43.9	0.7%	NM	NM	WALTONHIL	317,378	7.0%	0.1	30.8x	4.2x
Mutual Fund	872	848	+24.29	+2.86%	37	41,257	0.5%	898.8	13.8%	NM	0.8x	BATBC	280,098	6.2%	0.3	15.4x	5.7x
General Insurance	3,449	3,451	-2.12	-0.06%	42	100,770	1.3%	352.8	5.4%	18.7x	1.6x	SQURPHARMA	185,977	4.1%	144.5	9.5x	1.5x
Life Insurance	2,594	2,581	+12.34	+0.48%	15	72,500	0.9%	85.9	1.3%	NM	NM	ROBI	157,138	3.5%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.1	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,734	3,735	-0.89	-0.02%	33	723,002	9.4%	1,263.1	19.4%	19.7x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,691	1,691	-0.20	-0.01%	23	445,786	5.8%	74.4	1.1%	44.4x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,518	2,514	+3.94	+0.16%	7	120,555	1.6%	98.1	1.5%	17.0x	2.6x	BERGERPBL	80,517	1.8%	0.8	26.1x	6.4x
Services & Real Estate	1,621	1,627	-6.32	-0.39%	8	64,027	0.8%	126.6	1.9%	21.0x	0.8x	LHBL	80,019	1.8%	66.7	12.6x	3.7x
Engineering	4,521	4,520	+0.83	+0.02%	42	531,451	6.9%	1,110.6	17.1%	27.0x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,231	21,261	-30.05	-0.14%	21	392,862	5.1%	471.9	7.3%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,888	2,856	+32.24	+1.13%	11	37,655	0.5%	135.9	2.1%	29.8x	2.5x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,676	1,676	+0.14	+0.01%	58	173,606	2.2%	796.7	12.3%	NM	1.2x	BEACONPHAR	56,595	1.2%	0.0	86.9x	9.0x
Paper & Printing	8,834	8,832	+1.87	+0.02%	6	38,967	0.5%	306.8	4.7%	58.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,105	3,107	-1.84	-0.06%	6	35,487	0.5%	37.7	0.6%	58.4x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	31,192	31,128	+64.02	+0.21%	3	4,285	0.1%	42.1	0.6%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	702	704	-2.63	-0.37%	5	32,449	0.4%	215.3	3.3%	54.5x	1.9x	UNILEVERCL	38,992	0.9%	0.4	39.4x	18.8x
Miscellaneous	4,245	4,251	-5.94	-0.14%	14	231,150	3.0%	344.9	5.3%	26.5x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,416	4,362	+53.36	+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	3,184,831	41.2%	5.3	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NCCBLMF1	7.7	+10.0%	11.0	NM	0.9x
ATCSLGF	11.2	+9.8%	125.0	NM	1.1x
CAPITECGBF	14.7	+9.7%	116.2	NM	1.5x
1STPRIMFMF	30.7	+9.6%	105.3	NM	2.9x
OAL	20.5	+9.6%	446.9	NM	1.9x
CAPMIBBLMF	15.2	+9.4%	43.5	NM	1.7x
SEMLIBLSF	9.4	+9.3%	32.3	NM	1x
GLDNJMF	10.7	+9.2%	31.4	NM	1.1x
RELIANCE1	10.8	+9.1%	27.0	NM	1.0x
SHYAMPSUG	220.0	+8.7%	26.6	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	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%	4.2x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	18.3x	2.9x
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
SEAPEARL	13,733	0.8%	22.4x	7.5x
UPGDCL	13,547	0.8%	19.6x	4.1x
PRIMEBANK	13,491	0.8%	5.1x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OAL	20.5	+9.6%	446.9	NM	1.9x
ORIONINFU	423.2	+4.3%	414.9	NM	28.3x
CENTRALPHL	23.3	-4.1%	287.1	NM	4.2x
PDL	17.0	+1.2%	263.3	NM	1.2x
KPPL	31.2	+0.6%	250.9	NM	NM
ETL	14.5	+5.1%	209.5	31.5x	1.1x
BDTHAI	20.7	+5.1%	153.6	NM	0.7x
SQURPHARMA	209.8	-	144.5	9.5x	1.5x
BEACHHATCH	50.7	+5.4%	144.2	47.8x	4.6x
ATCSLGF	11.2	+9.8%	125.0	NM	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	83.9	-5.3%	57.4	42.4x	NM
LIBRAINFU	1,534.2	-5.1%	98.6	NM	1x
GQBALLPEN	147.0	-4.8%	34.7	NM	1.2x
SKTRIMS	32.6	-4.4%	61.0	28.8x	2.0x
CENTRALPHL	23.3	-4.1%	287.1	NM	4.2x
ADVENT	24.3	-4.0%	65.0	24.3x	1.6x
AZIZPIPES	137.9	-3.9%	63.7	NM	NM
KAY&QUE	247.8	-3.7%	36.0	NM	3.3x
ANLIMAYARN	44.4	-3.7%	66.5	NM	4.3x
AFTABAUTO	31.8	-3.6%	68.0	NM	0.6x

\* 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)
SUNLIFEINS	50.0	50.0	4.0	2,024	101.20
BEACONPHAR	241.5	223.6	12.0	287	64.11
BEACHHATCH	46.6	44.0	3.0	580	25.73
ADNTEL	108.0	108.0	1.0	124	13.39
BXPBARMA	131.8	131.6	10.0	89	11.75
GP	261.6	261.6	2.0	40	10.50
EXIM1STMF	5.3	5.3	17.0	1,975	10.47
SPCL	63.5	63.5	1.0	160	10.16
ROBI	27.0	27.0	3.0	374	10.11
EGEN	44.9	40.7	5.0	235	9.65

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SUNLIFEINS	50.0	50.0	101.2	2,024	4
BEACONPHAR	241.5	223.6	64.1	287	12
BEACHHATCH	46.6	44.0	25.7	580	3
ADNTEL	108.0	108.0	13.4	124	1
BXPHARMA	131.8	131.6	11.8	89	10
GP	261.6	261.6	10.5	40	2
EXIM1STMF	5.3	5.3	10.5	1,975	17
SPCL	63.5	63.5	10.2	160	1
ROBI	27.0	27.0	10.1	374	3
EGEN	44.9	40.7	9.7	235	5
SQURPHARMA	209.8	209.6	8.2	39	3
SOUTHEASTB	12.8	12.5	6.7	531	4
NBL	8.0	8.0	5.6	700	7
POWERGRID	52.0	47.2	5.5	113	2
BATBC	479.8	479.8	5.1	11	8
ACMEPL	34.5	31.9	5.0	154	7
PADMAOIL	195.0	195.0	4.9	25	5
HRTEX	114.9	109.9	4.8	43	5
ACMELAB	77.1	76.9	4.8	62	8
TITASGAS	44.9	44.9	4.5	100	1
EBL1STMF	6.7	6.7	4.0	600	7
DELTALIFE	150.1	128.0	4.0	29	5
<b>Total</b>			<b>390.9</b>		<b>195</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

##### GSPFINANCE

**(Q3 Un-audited):** Consolidated EPS was Tk. (2.75) for July-September 2023 as against Tk. 0.18 for July-September 2022; Consolidated EPS was Tk. (4.25) for January-September 2023 as against Tk. 0.63 for January-September 2022. Consolidated NOCFPS was Tk. (1.49) for January-September 2023 as against Tk. (0.28) for January-September 2022. Consolidated NAV per share was Tk. 23.53 as on September 30, 2023 and Tk. 27.78 as on December 31, 2022.

##### RUPALIBANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Rupali Bank PLC.' instead of 'Rupali Bank Limited' with effect from December 21, 2023. Other things (except name) will remain unchanged.

##### SUNLIFEINS

Referring to the BSEC letter No. SEC/SRIC/53/2014-357 dated November 16, 2023 regarding the sale of whole shares of the directors, sponsors and shareholders of the company, Mr. Zahid Maleque, one of the Sponsors of the company, has expressed his intention to sell his entire holdings of 8,16,000 shares of the Company as per share purchase agreement (In the Block Market) through Dhaka Stock Exchange Limited within 30 working days after issuance of the BSEC letter. Referring to the BSEC letter No. SEC/SRIC/53/2014-357 dated November 16, 2023 regarding the sale of whole shares of the directors, sponsors and shareholders of the company, Mrs. Rubina Hamid, one of the Sponsors of the company, has expressed her intention to sell her entire holdings of 5,58,000 shares of the Company as per share purchase agreement (In the Block Market) through Dhaka Stock Exchange Limited within 30 working days after issuance of the BSEC letter.

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