

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 12.7 points and closed at 6,249.29. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.15%), and the large-cap index CDSET (-0.08%) closed at 2,094.58, 1,365.44, and 1,204.38 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.07%, followed by NBF1 (+0.05%), Fuel & Power (+0.02%), Pharmaceutical (+0.01%), Telecommunication (+0.00%), Food & Allied (-0.03%), and Engineering (-0.19%), respectively. Block trades contributed 7.5% of the overall market turnover. Orion Infusion Ltd. (-2.4%) was the most traded share with a turnover of BDT 392 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,249.29	6,261.99	-12.70	-0.20%	+0.7%
DS30	2,094.58	2,099.45	-4.86	-0.23%	-4.6%
DSES	1,365.44	1,367.44	-2.00	-0.15%	+0.5%
CDSET	1,204.38	1,205.36	-0.98	-0.08%	-0.8%

	Advanced	Declined	Unchanged	Total
All Category	55	106	198	359
A Category (Equity)	39	56	138	233
B Category (Equity)	13	44	46	103
N Category (Equity)	1	0	0	1
Z Category (Equity)	2	6	14	22
Mutual Funds	5	13	19	37
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,737,061	7,741,357	-0.1%
	Mn USD	70,337	70,376	
Turnover	Mn BDT	6,270	6,894	-9.1%
	Mn USD	57	63	
Volume	Mn Shares	237	282	-15.9%
No. of Trade		174,103	174,670	-0.3%

* Average Interbank Exchange Rate is BDT 110.00 as of Dec 21, 2023

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Billal Hossain

Research Associate

(880) 1708805229

billal.hossain@bracepl.com

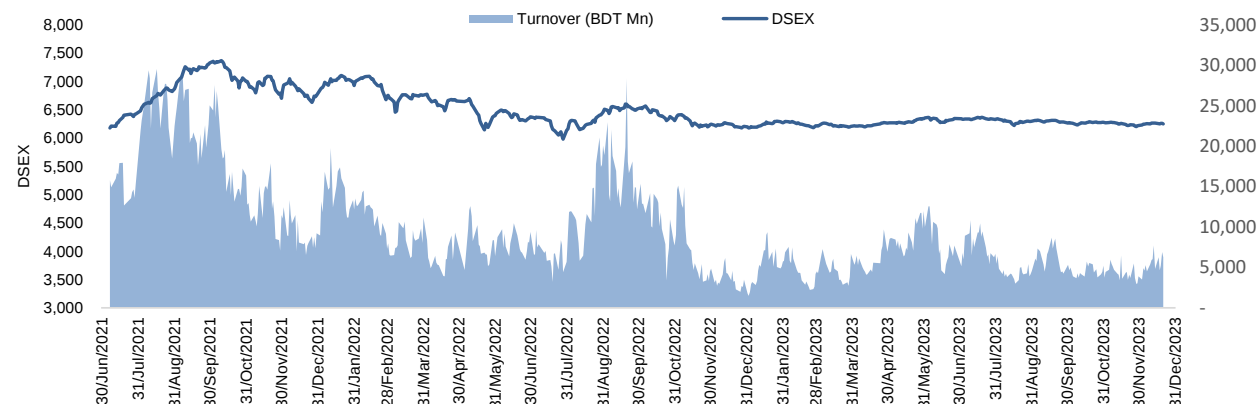


Figure: Sectorial Turnover (BDT Mn)

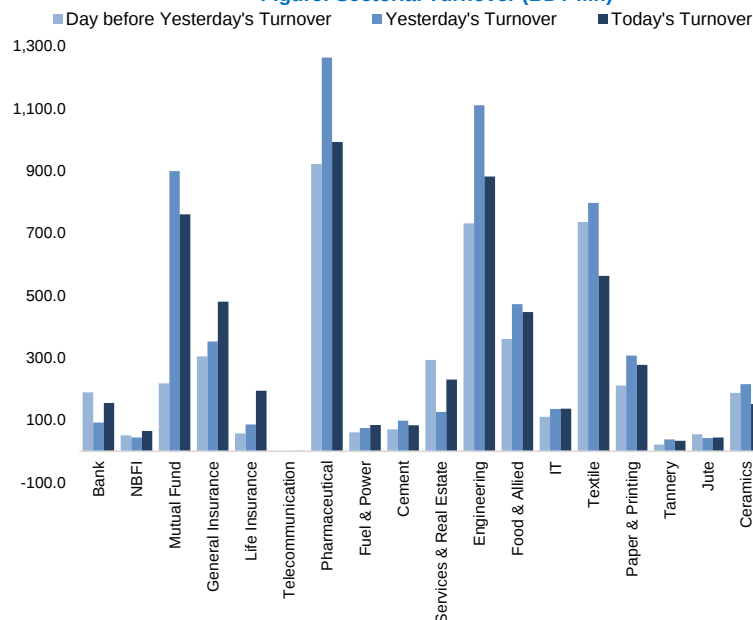
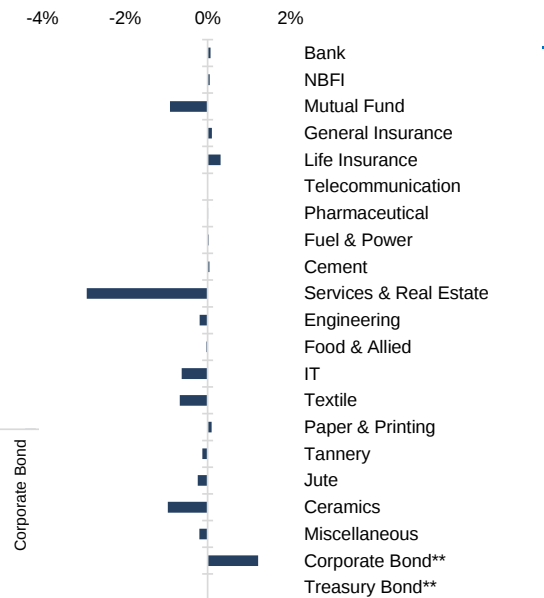


Figure: Sectorial Mcap Change



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	1,452	1,451	+1.00	+0.07%	35	684,760	8.9%	155.0	2.7%	12.5x	0.7x	GP	386,996	8.6%	0.6	12.5x	6.4x
NBFI	1,923	1,922	+1.01	+0.05%	23	187,116	2.4%	65.3	1.1%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	864	872	-7.97	-0.91%	37	40,879	0.5%	760.2	13.1%	NM	0.8x	BATBC	280,098	6.2%	0.9	15.4x	5.7x
General Insurance	3,452	3,449	+3.51	+0.10%	42	100,873	1.3%	479.9	8.3%	18.7x	1.6x	SQURPHARMA	185,977	4.1%	58.9	9.5x	1.5x
Life Insurance	2,602	2,594	+8.06	+0.31%	15	72,725	0.9%	194.7	3.4%	NM	NM	ROBI	157,138	3.5%	0.6	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	1.1	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,741	3,740	+0.45	+0.01%	33	723,090	9.4%	992.7	17.1%	19.7x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,690	1,690	+0.39	+0.02%	23	445,889	5.8%	84.5	1.5%	44.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,509	2,508	+1.12	+0.04%	7	120,609	1.6%	83.4	1.4%	17.0x	2.6x	BERGERPBL	80,493	1.8%	2.4	26.1x	6.4x
Services & Real Estate	1,573	1,621	-47.47	-2.93%	8	62,152	0.8%	230.2	4.0%	20.4x	0.8x	LHBL	79,902	1.8%	51.5	12.6x	3.7x
Engineering	4,516	4,525	-8.82	-0.19%	42	530,415	6.9%	881.6	15.2%	26.9x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,225	21,231	-6.16	-0.03%	21	392,748	5.1%	447.1	7.7%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,870	2,888	-18.17	-0.63%	11	37,419	0.5%	137.0	2.4%	29.6x	2.5x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,665	1,676	-11.26	-0.67%	58	172,440	2.2%	562.8	9.7%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.1	86.9x	9.0x
Paper & Printing	10,123	10,114	+9.72	+0.10%	6	39,004	0.5%	277.2	4.8%	58.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,130	3,134	-4.01	-0.13%	6	35,441	0.5%	33.6	0.6%	58.3x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,476	17,518	-41.70	-0.24%	3	4,275	0.1%	44.4	0.8%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	695	702	-6.74	-0.96%	5	32,138	0.4%	151.8	2.6%	53.9x	1.9x	UNILEVERCL	39,106	0.9%	1.2	39.5x	18.9x
Miscellaneous	4,237	4,245	-8.42	-0.20%	14	230,692	3.0%	212.3	3.7%	26.4x	1.8x	POWERGRID	37,347	0.8%	0.2	NM	0.3x
Corporate Bond**	4,416	4,362	+53.36	+1.22%	12	41,374	0.5%	1.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.01%	238	3,185,000	41.3%	2.0	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
GLDNJMF	11.7	+9.3%	96.5	NM	1.2x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	ORIONINFU	413.2	-2.4%	392.4	NM	27.7x
MIDLANDBNK	13.9	+5.3%	73.6	10.9x	1.1x	BATBC	74,086	4.3%	15.4x	5.7x	OAL	18.9	-7.8%	279.8	NM	1.7x
NCCBLMF1	8.1	+5.2%	18.3	NM	0.9x	BEXIMCO	69,196	4.0%	34.2x	1.2x	KPPL	28.3	-9.3%	186.3	NM	NM
KOHINOOR	468.3	+4.9%	150.3	45.8x	15.5x	RENATA	68,042	3.9%	66.1x	4.4x	SEAPEARL	124.0	-9.9%	183.0	20.1x	6.7x
UNIONCAP	9.5	+4.4%	39.1	NM	NM	BXPBARMA	45,564	2.6%	13.8x	1.4x	PDL	15.5	-8.8%	178.7	NM	1.1x
FINEFOODS	139.2	+3.6%	54.4	NM	13.2x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	BDTHAI	21.2	+2.4%	174.3	NM	0.8x
APEXFOODS	314.2	+3.4%	38.4	34.3x	2x	GP	38,700	2.2%	12.5x	6.4x	CENTRALPHL	21.7	-6.9%	168.5	NM	3.9x
RUPALIBANK	27.7	+3.4%	35.4	20.6x	0.8x	BRACBANK	30,964	1.8%	7.7x	0.9x	EIL	37.7	+1.3%	165.2	32.5x	2.1x
MONOSPOOL	258.0	+3.2%	37.8	31.9x	5.2x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	KOHINOOR	468.3	+4.9%	150.3	45.8x	15.5x
BDTHAI	21.2	+2.4%	174.3	NM	0.8x	LHBL	28,562	1.6%	12.6x	3.7x	ETL	13.3	-8.3%	127.6	28.9x	1.1x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	19,116	1.1%	NM	0.9x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	124.0	-9.9%	183.0	20.1x	6.7x	CITYBANK	18,190	1.0%	5.2x	0.7x	PTL	83.6	76.5	5.0	1,616	134.54
ANLIMAYARN	40.2	-9.5%	41.1	NM	4x	OLYMPIC	16,066	0.9%	18.5x	2.9x	DAFODILCOM	93.4	93.4	1.0	900	84.06
KPPL	28.3	-9.3%	186.3	NM	NM	ROBI	15,714	0.9%	52.6x	2.4x	EGEN	45.1	40.7	5.0	587	25.30
CAPMIBBLMF	13.8	-9.2%	36.3	NM	1.5x	ALARABANK	14,357	0.8%	12.5x	1.1x	BEACHHATCH	54.0	46.5	2.0	510	23.79
PDL	15.5	-8.8%	178.7	NM	1.1x	BSRMLTD	14,210	0.8%	5.2x	0.6x	ORIONPHARM	71.8	71.8	2.0	243	17.48
AFTABAUTO	29.0	-8.8%	27.6	NM	0.6x	SEAPEARL	13,733	0.8%	20.1x	6.7x	CITYBANK	19.3	19.3	6.0	902	17.41
STANCERAM	171.3	-8.7%	45.4	NM	NM	UPGDCL	13,547	0.8%	19.6x	4.1x	ACMEPL	35.4	31.9	17.0	513	16.54
ETL	13.3	-8.3%	127.6	28.9x	1.1x	PRIMEBANK	13,491	0.8%	5.1x	0.7x	EMERALDOIL	92.2	76.5	5.0	145	13.13
1STPRIMFMF	28.2	-8.1%	112.0	NM	2.7x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.					EXIM1STMF	5.3	5.3	19.0	2,055	10.89
DACCADYE	13.8	-8.0%	37.0	NM	0.4x	** The base of the Bond Index starts at 100, starting from Jan 13, 2022					ROBI	27.0	27.0	2.0	298	8.04
						Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022										

* 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
PTL	83.6	76.5	134.5	1,616	5
DAFODILCOM	93.4	93.4	84.1	900	1
EGEN	45.1	40.7	25.3	587	5
BEACHHATCH	54.0	46.5	23.8	510	2
ORIONPHARM	71.8	71.8	17.5	243	2
CITYBANK	19.3	19.3	17.4	902	6
ACMEPL	35.4	31.9	16.5	513	17
EMERALDOIL	92.2	76.5	13.1	145	5
EXIM1STMF	5.3	5.3	10.9	2,055	19
ROBI	27.0	27.0	8.0	298	2
NBL	8.0	8.0	8.0	1,000	8
BATBC	480.0	479.8	6.8	14	8
AL-HAJTEX	130.0	130.0	6.5	50	4
ACMELAB	79.5	76.5	5.8	75	10
BXPHARMA	131.6	131.6	5.3	40	3
ASIAPACINS	53.6	45.0	5.2	105	2
SKTRIMS	35.7	34.0	3.9	112	3
BRACBANK	34.1	33.9	3.6	106	4
PRAGATIINS	60.0	60.0	3.6	60	1
FAREASTLIF	74.9	67.6	3.6	49	5
MPETROLEUM	198.3	193.1	3.3	17	4
SEAPEARL	150.0	130.0	2.8	20	3
Total			471.4		188

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

MLDYEING

The Company will be placed in 'B' category from existing 'A' category with effect from December 24, 2023 as the Company has approved 2% Cash Dividend for the year ended June 30, 2023.

TITASGAS

The Company will be placed in 'B' category from existing 'A' category with effect from December 24, 2023 as the Company has approved 5% Cash Dividend for the year ended June 30, 2023.

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