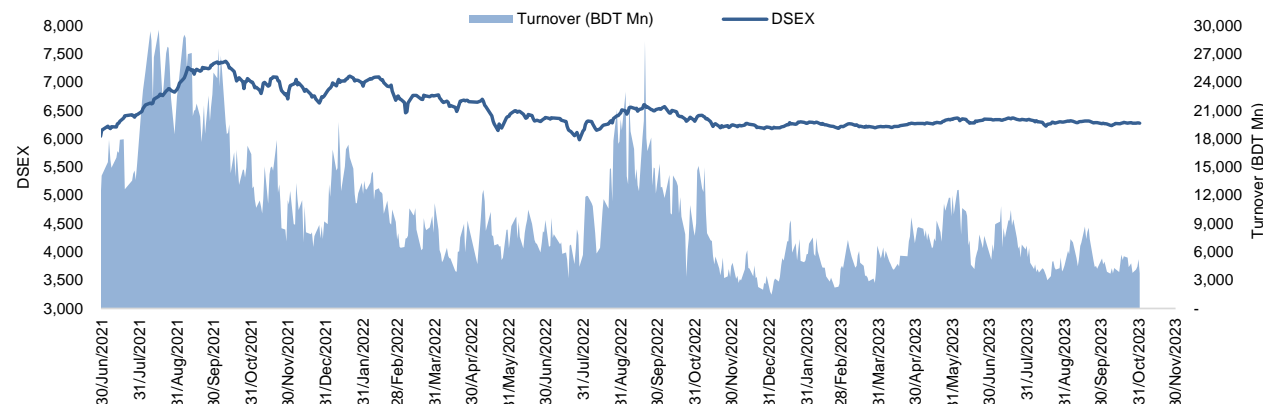


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.08%) lost 4.94 points and closed at 6,273.72. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (-0.17%), and the large-cap index CDSET (+0.03%) closed at 2,133.98, 1,360.42, and 1,214.94 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.59% followed by Food & Allied (+0.10%), NBFi (0.00%). Bank experienced the highest loss of 0.03% followed by Fuel & Power (-0.02%), Engineering (-0.02%). Block trades contributed 4.6% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+1.7%) was the most traded share with a turnover of BDT 238 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,273.72	6,278.66	-4.94	-0.08%	+1.1%
DS30	2,133.98	2,133.87	+0.11	+0.01%	-2.8%
DSES	1,360.42	1,362.73	-2.31	-0.17%	+0.1%
CDSET	1,214.94	1,214.63	+0.31	+0.03%	+0.0%

	Advanced	Declined	Unchanged	Total
All Category	50	92	167	309
A Category (Equity)	28	64	106	198
B Category (Equity)	17	26	51	94
N Category (Equity)	0	1	0	1
Z Category (Equity)	5	1	10	16
Mutual Funds	0	5	14	19
Corporate Bonds	0	0	1	1
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,848,803	7,842,670	+0.1%
	Mn USD	71,030	70,974	
Turnover	Mn BDT	3,723	5,229	-28.8%
	Mn USD	34	47	
Volume	Mn Shares	59	128	-54.2%
No. of Trade		114,720	135,371	-15.3%

* Average Interbank Exchange Rate is BDT 110.50 as of Nov 01, 2023

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Figure: Sectorial Turnover (BDT Mn)

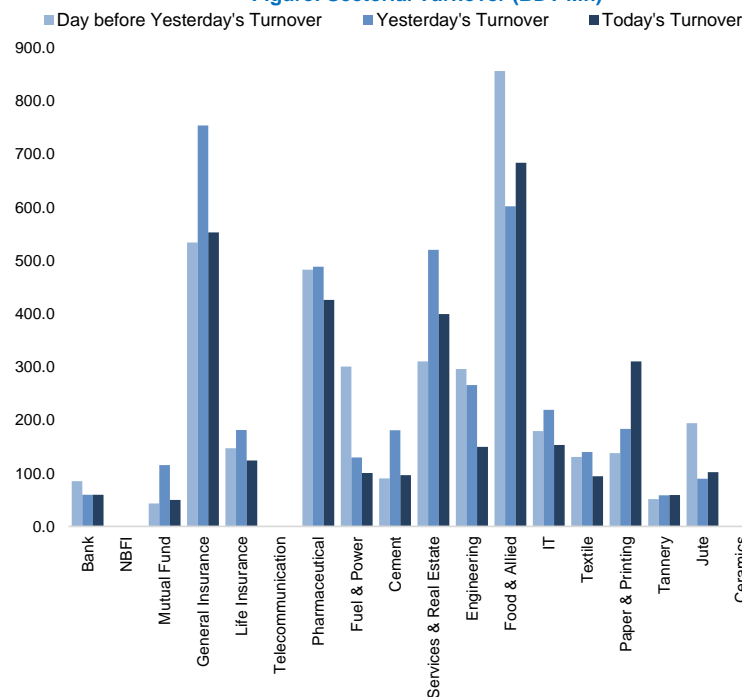
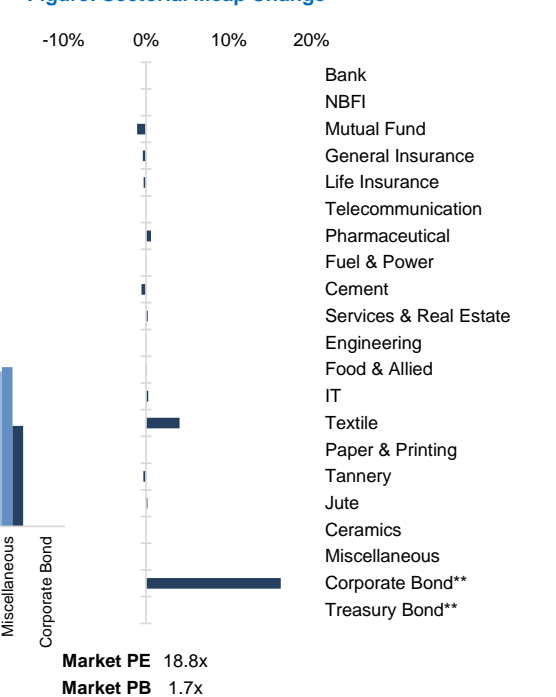


Figure: Sectorial Mcap Change



Market PE 18.8x

Market PB 1.7x

* 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	1,450	1,450	-0.40	-0.03%	35	684,166	8.7%	59.4	1.7%	12.5x	0.7x	GP	386,996	8.5%	0.1	12.5x	6.4x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.7	0.0%	NM	25.3x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	869	879	-9.33	-1.06%	37	41,124	0.5%	49.7	1.4%	NM	0.8x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,641	3,654	-13.35	-0.37%	42	106,201	1.4%	552.8	15.6%	19.7x	1.7x	SQURPHARMA	187,130	4.1%	31.4	9.9x	1.6x
Life Insurance	2,623	2,631	-7.51	-0.29%	15	73,323	0.9%	123.8	3.5%	NM	NM	ROBI	157,138	3.5%	0.2	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.3	0.0%	15.9x	4.2x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,741	3,719	+22.04	+0.59%	33	724,872	9.3%	425.8	12.0%	20.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,700	1,700	-0.36	-0.02%	23	448,316	5.7%	100.2	2.8%	34.3x	1.1x	BEXIMCO	103,571	2.3%	0.0	14.6x	1.2x
Cement	2,549	2,563	-14.24	-0.56%	7	122,436	1.6%	96.3	2.7%	20.7x	2.6x	LHBL	82,109	1.8%	67.4	12.9x	3.8x
Services & Real Esta	1,878	1,874	+4.27	+0.23%	8	74,194	0.9%	399.5	11.2%	23.3x	1.2x	BERGERPBL	81,973	1.8%	1.7	26.6x	6.5x
Engineering	4,489	4,490	-0.89	-0.02%	42	527,239	6.7%	149.7	4.2%	33.3x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,509	21,489	+20.63	+0.10%	21	398,007	5.1%	684.1	19.3%	20.2x	7.1x	BXPHARMA	65,222	1.4%	0.0	14.1x	1.5x
IT	2,992	2,983	+8.27	+0.28%	11	39,001	0.5%	153.1	4.3%	27.6x	2.6x	BRACBANK	57,596	1.3%	0.8	7.7x	0.9x
Textile	1,665	1,600	+65.19	+4.07%	58	174,315	2.2%	94.4	2.7%	73.1x	1.2x	BEACONPHAR	56,595	1.2%	0.0	NM	9.5x
Paper & Printing	9,910	9,905	+4.83	+0.05%	6	38,183	0.5%	310.5	8.7%	58.2x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,129	3,139	-10.25	-0.33%	6	33,045	0.4%	59.2	1.7%	43.8x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	19,348	19,311	+37.39	+0.19%	3	4,733	0.1%	101.8	2.9%	NM	NM	TITASGA	40,459	0.9%	0.0	NM	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.2	0.0%	53.7x	1.9x	UNILEVERCL	39,187	0.9%	0.8	39.6x	18.9x
Miscellaneous	4,151	4,150	+0.50	+0.01%	14	225,995	2.9%	189.2	5.3%	17.7x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	255	219	+35.70	+16.31%	11	40,883	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	89	89	+0.01	+0.01%	242	3,282,169	41.9%	0.2	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RNSPIN	23.2	#####	0.3	NM	1160.0x
FARCHEM	31.3	#####	0.0	NM	2.9x
IMAMBUTTON	198.2	+10.0%	17.2	NM	72.3x
SHYAMPSUG	153.2	+5.9%	9.9	NM	NM
BEACHHATCH	51.1	+4.9%	138.7	48.2x	4.6x
MONOSPOOL	313.1	+4.9%	208.6	37.9x	6.0x
AIL	80.0	+4.8%	43.6	44.4x	3x
RELIANCINS	74.5	+3.5%	34.0	13.2x	1.1x
MEGHNACEM	73.1	+3.4%	18.9	62.1x	1.4x
ADNTEL	123.1	+3.4%	34.0	30.8x	4.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CAPITECGBF	23.1	-9.8%	17.0	NM	2.3x
DESHBANDHU	37.8	-5.0%	56.5	NM	2x
CRYSTALINS	85.8	-4.7%	18.5	28.0x	3.4x
AMBEEPHA	1,055.2	-4.4%	37.4	NM	55.5x
SAMATALETH	59.7	-4.0%	4.0	NM	4.2x
KPPL	10.7	-3.6%	12.7	NM	NM
MIDLANDBNK	11.7	-3.3%	28.4	9.2x	0.9x
LIBRAINFU	1,531.1	-3.2%	76.3	NM	1.2x
EASTERNINS	63.2	-3.1%	31.2	22.5x	1.2x
CAPMBDBLMF	9.9	-2.9%	10.4	NM	1.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.9x	1.6x
BATBC	74,086	4.3%	15.4x	5.7x
BEXIMCO	69,196	4.0%	14.6x	1.2x
RENATA	68,042	3.9%	66.1x	4.4x
BXPHARMA	45,564	2.6%	14.1x	1.5x
BEACONPHAR	39,617	2.3%	NM	9.5x
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%	12.9x	3.8x
PUBALIBANK	19,162	1.1%	4.4x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	19.8x	3.1x
ROBI	15,714	0.9%	52.6x	2.4x
ALARABANK	14,357	0.8%	12.5x	1.1x
BSRMLTD	14,210	0.8%	9.2x	0.6x
SEAPEARL	13,733	0.8%	32.9x	11.0x
UPGDCL	13,547	0.8%	16.9x	4.4x
PRIMEBANK	13,491	0.8%	5.2x	0.7x

* 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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SEAPEARL	202.7	+1.7%	237.9	32.9x	11.0x
MONOSPOOL	313.1	+4.9%	208.6	37.9x	6.0x
ORIONINFU	360.0	-	188.7	NM	26.1x
FUWANGFOOI	31.8	+1.0%	169.7	NM	13.1x
EMERALDOIL	138.5	+0.4%	145.8	NM	NM
BEACHHATCH	51.1	+4.9%	138.7	48.2x	4.6x
GEMINISEA	733.7	-2.9%	125.9	47.4x	29.3x
SAMORITA	106.8	-2.3%	105.3	NM	1.9x
SONALIANS	687.4	-0.0%	101.2	NM	5.9x
LIBRAINFU	1,531.1	-3.2%	76.3	NM	1.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EMERALDOIL	151.8	126.0	17.0	409	52.24
NBL	8.1	7.9	8.0	2,100	16.71
SIMTEX	25.4	25.4	2.0	434	11.04
UTTARABANK	22.0	21.8	2.0	479	10.53
BRACBANK	32.3	32.3	1.0	204	6.59
SONALIPAPR	661.0	569.0	4.0	8	5.12
SEAPEARL	185.6	185.6	1.0	27	4.92
DULAMIACOT	71.0	71.0	4.0	66	4.69
SONALILIFE	88.5	88.5	1.0	50	4.43
FINEFOODS	127.0	127.0	2.0	32	4.03

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EMERALDOIL	151.8	126.0	52.2	409	17
NBL	8.1	7.9	16.7	2,100	8
SIMTEX	25.4	25.4	11.0	434	2
UTTARABANK	22.0	21.8	10.5	479	2
BRACBANK	32.3	32.3	6.6	204	1
SONALIPAPR	661.0	569.0	5.1	8	4
SEAPEARL	185.6	185.6	4.9	27	1
DULAMACOT	71.0	71.0	4.7	66	4
SONALILIFE	88.5	88.5	4.4	50	1
FINEFOODS	127.0	127.0	4.0	32	2
CNATEX	9.8	9.6	3.2	335	4
SONALIANS	739.0	739.0	3.0	4	2
GP	286.0	261.6	2.9	10	3
HRTEX	115.6	110.0	2.9	25	2
ABB1STMF	4.9	4.7	2.6	542	3
RUPALILIFE	114.0	110.0	2.5	22	3
BATBC	518.7	479.8	2.1	4	4
NPOLYMER	48.0	46.0	2.0	43	4
APEXFOODS	340.0	340.0	2.0	6	1
UNIQUEHRL	63.5	63.5	1.9	30	2
DESHBANDHU	41.0	41.0	1.8	45	1
APEXFOOT	286.9	286.9	1.5	5	1
Total			171.8		103

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
APEXTANRY		0.0%	5%	Record Date	7-Nov-23
MATINSPIIN		0.0%	40%	Record Date	7-Nov-23
BSC		0.0%	25%	Record Date	7-Nov-23
MIDASFIN		0.0%	2%	Record Date	7-Nov-23
EGEN		0.0%	10%	Record Date	8-Nov-23
BSRMSTEEL		0.0%	25%	Record Date	8-Nov-23
BSRMLTD		0.0%	25%	Record Date	8-Nov-23
PENINSULA		0.0%	0%	Record Date	9-Nov-23
DOREENPWR		0.0%	11%	Record Date	9-Nov-23
TILIL		0.0%	2%	Record Date	11-Nov-23
ISNLTD		0.0%	1%	Record Date	11-Nov-23
BDLAMPS		0.0%	10%	Record Date	12-Nov-23
RNSPIN		0.0%	0%	Record Date	12-Nov-23
FARCHEM		0.0%	0%	Record Date	12-Nov-23
RENATA		0.0%	63%	Record Date	12-Nov-23
LIBRAINFU		50.0%	30%	Record Date	12-Nov-23
IMAMBUTTON		0.0%	0%	Record Date	13-Nov-23

Important DSE News

ISNLTD

The Board of Directors has recommended 1% Cash Dividend for the year ended June 30, 2023. Date of AGM: 21.12.2023. Time: 11:30 AM. Venue: Digital Platform. Record Date: 23.11.2023. The Company has also reported EPS of Tk. 0.43, NAV per share of Tk. 2.93 and NOCFPS of Tk. 1.55 for the year ended June 30, 2023 as against Tk. 0.59, Tk. 3.12 and Tk. 1.59 respectively for the year ended June 30, 2022.

BRACBANK

(Q3 Un-audited): Consolidated EPS was Tk. 1.34 for July-September, 2023 as against Tk. 0.99 for July-September, 2022; Consolidated EPS was Tk. 3.26 for January-September, 2023 as against Tk. 2.35 for January-September, 2022. Consolidated NOCFPS was Tk. 28.02 for January-September, 2023 as against Tk. 4.46 for January-September, 2022. Consolidated NAV per share was Tk. 40.22 as on September 30, 2023 and Tk. 38.01 as on December 31, 2022.

MONOSPOOL

The Board of Directors has recommended 15% cash and 10% stock dividend for the year ended June 30, 2023. The stock dividend is subject to approval of BSEC. Date of AGM: 28.12.2023, Time: 10:30 AM, Venue: Digital Platform. Record Date: 10.12.2023. The Company has also reported EPS of Tk. 8.27, NAV per share of Tk. 52.17 and NOCFPS of Tk. (19.62) for the year ended June 30, 2023 as against Tk. 5.45, Tk. 44.88 and Tk. 7.19 respectively for the year ended June 30, 2022.

PHOENIXFIN

(Q3 Un-audited): EPS was Tk. (9.60) for July-September 2023 as against Tk. (1.51) for July-September 2022; EPS was Tk. (23.07) for January-September 2023 as against Tk. (1.50) for January-September 2022. NOCFPS was Tk. (1.56) for January-September 2023 as against Tk. (1.29) for January-September 2022. NAV per share was Tk. (13.89) as on September 30, 2023 and Tk. 9.18 as on December 31, 2022.

EASTERNINS

(Q3 Un-audited): EPS was Tk. 0.59 for July-September 2023 as against Tk. 0.88 for July-September 2022; EPS was Tk. 1.90 for January-September 2023 as against Tk. 2.65 for January-September 2022. NOCFPS was Tk. (0.73) for January-September 2023 as against Tk. 2.34 for January-September 2022. NAV per share was Tk. 51.45 as on September 30, 2023 and Tk. 52.49 as on December 31, 2022.

ABBANK

(Q3 Un-audited): Consolidated EPS was Tk. 0.13 for July-September 2023 as against Tk. 0.11 for July-September 2022; Consolidated EPS was Tk. 0.55 for January-September 2023 as against Tk. 0.52 for January-September 2022. Consolidated NOCFPS was Tk. 9.01 for January-September 2023 as against Tk. (18.66) for January-September 2022. Consolidated NAV per share was Tk. 29.45 as on September 30, 2023 and Tk. 29.05 as on September 30, 2022.

PRAGATIINS

(Q3 Un-audited): EPS was Tk. 0.36 for July-September 2023 as against Tk. 1.67 (Restated) for July-September 2022; EPS was Tk. 3.01 for January-September 2023 as against Tk. 4.63 (Restated) for January-September 2022. NOCFPS was Tk. (2.52) for January-September 2023 as against Tk. 4.85 (Restated) for January-September 2022. NAV per share was Tk. 56.69 as on September 30, 2023 and Tk. 59.01 as on December 31, 2022.

BATASHOE

(Q3 Un-audited): EPS was Tk. (1.19) for July-September 2023 as against Tk. (4.31) for July-September 2022; EPS was Tk. 30.88 for January-September 2023 as against Tk. 20.11 for January-September 2022. NOCFPS was Tk. 39.28 for January-September 2023 as against Tk. 53.97 for January-September 2022. NAV per share was Tk. 272.54 as on September 30, 2023 and Tk. 252.16 as on December 31, 2022.

The Board of Directors of the Company has declared 330% interim cash dividend based on 9 months financials for the period ended September 30, 2023 and the retained earnings up to December 31, 2022. Record date for entitlement of interim cash dividend: 21.11.2023.

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SAMATALETH

(Q2 Un-audited): EPS was Tk. (0.04) for October-December 2022 as against Tk. (0.02) for October-December 2021; EPS was Tk. (0.05) for July-December 2022 as against Tk. (0.04) for July-December 2021. NOCFPS was Tk. (0.07) for July-December 2022 as against Tk. 0.41 for July-December 2021. NAV per share was Tk. 14.25 as on December 31, 2022 and Tk. 14.30 as on June 30, 2022.

MEGHNAIS

(Q3 Un-audited): EPS was Tk. 0.11 for July-September, 2023 as against Tk. 0.24 for July-September, 2022; EPS was Tk. 1.08 for January-September, 2023 as against Tk. 0.47 for January-September, 2022. NOCFPS was Tk. (0.32) for January-September, 2023 as against Tk. (1.24) for January-September, 2022. NAV per share was Tk. 14.42 as on September 30, 2023 and Tk. 17.21 as on December 31, 2022.

PAPERPROC

The Board of Directors has recommended 12% Cash and 8% Stock Dividend for the year ended June 30, 2023. The Stock Dividend is subject to the approval of BSEC. Date of AGM: 28.12.2023, Time: 12:30 PM, Venue: Digital Platform. Record Date: 10.12.2023. The company has informed that Stock Dividend is declared to meet regulatory requirements to raise paid up capital and re-investment in business as working capital. The Company has also reported EPS of Tk. 4.71, NAV per share of Tk. 35.50 and NOCFPS of Tk. (2.91) for the year ended June 30, 2023 as against Tk. 4.62, Tk. 31.59 and Tk. 0.95 respectively for the year ended June 30, 2022.

USMANIAGL

The Board of Directors has recommended No dividend for the year ended June 30, 2023. Date of AGM: 20.12.2023, Time: 10:30 AM, Venue: Digital Platform. Record Date: 22.11.2023. The Company has also reported EPS of Tk. (5.94), NAV per share of Tk. 76.97 and NOCFPS of Tk. (7.30) for the year ended June 30, 2023 as against Tk. (2.66), Tk. 82.90 and Tk. 2.33 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. (3.10) for July-September 2023 as against Tk. (0.28) for July-September 2022; NOCFPS was Tk. (3.22) for July-September 2023 as against Tk. (0.84) for July-September 2022. NAV per share was Tk. 73.87 as on September 30, 2023 and Tk. 76.97 as on June 30, 2023. Reasons for deviation in NAVPS and NOCFPS: NAVPS has been decreased due to operating loss of the quarter.

SALAMCRST

The Board of Directors has recommended 5% Cash Dividend for the year ended June 30, 2023. Date of AGM: 23.01.2024, Time: 10:30 AM, Venue: Digital Platform. Record date: 07.12.2023. The Company has also reported consolidated EPS of Tk. 0.49, consolidated NAV per share of Tk. 18.55 and consolidated NOCFPS of Tk. (17.70) for the year ended June 30, 2023 as against Tk. 0.67, Tk. 18.56 and Tk. 37.57 respectively for the year ended June 30, 2022.

PUBALIBANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Pubali Bank PLC.' instead of 'Pubali Bank Limited' with effect from November 02, 2023. Other things (except name) will remain unchanged.

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