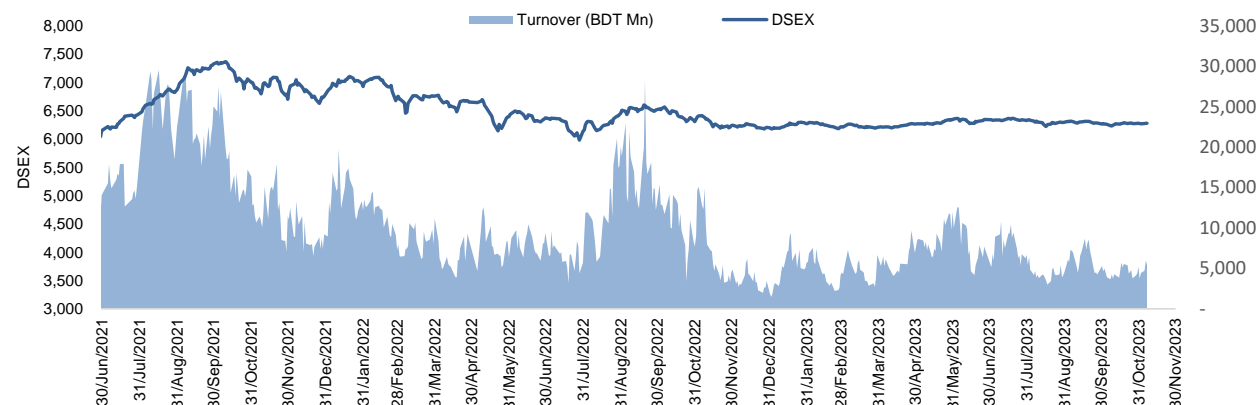


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 0.97 points and closed at 6,276.66. The blue-chip index DS30 (-0.13%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (-0.05%) closed at 2,130.56, 1,361.90, and 1,213.37 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.03% followed by NBF1 (+0.01%), Fuel & Power (+0.01%). Pharmaceutical experienced the highest loss of 0.12% followed by Bank (-0.04%), Food & Allied (-0.02%). Block trades contributed 7.2% of the overall market turnover. Fu Wang Food Ltd. (+1.5%) was the most traded share with a turnover of BDT 353 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,276.66	6,277.63	-0.97	-0.02%	+1.1%
DS30	2,130.56	2,133.32	-2.77	-0.13%	-2.9%
DSES	1,361.90	1,362.21	-0.30	-0.02%	+0.2%
CDSET	1,213.37	1,213.99	-0.62	-0.05%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	55	87	167	309
A Category (Equity)	26	60	112	198
B Category (Equity)	24	24	43	91
N Category (Equity)	0	1	0	1
Z Category (Equity)	5	2	12	19
Mutual Funds	1	2	17	20
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,796,448	7,798,793	
	Mn USD	70,238	70,259	-0.0%
Turnover	Mn BDT	5,458	5,958	-8.4%
	Mn USD	49	54	
Volume	Mn Shares	129	134	-3.3%
No. of Trade		141,018	149,599	-5.7%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 07, 2023

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Figure: Sectorial Turnover (BDT Mn)

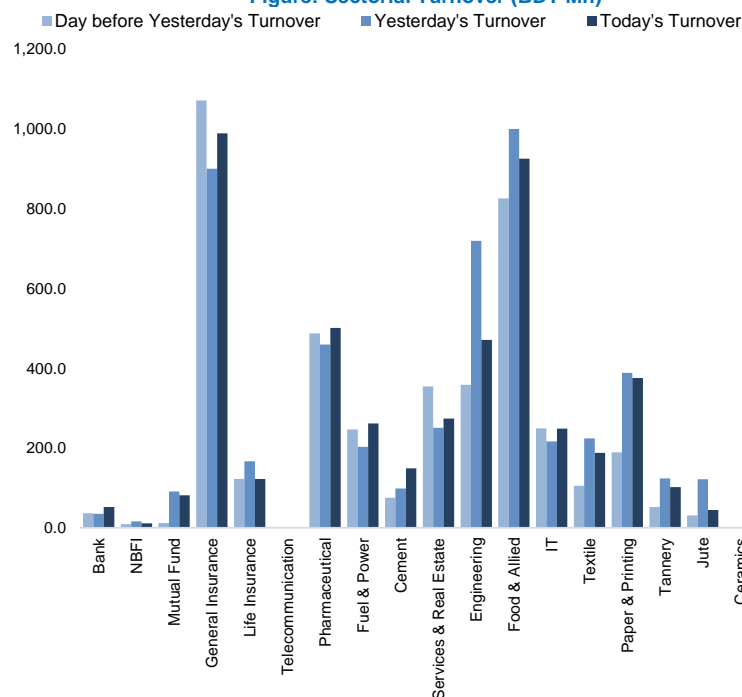
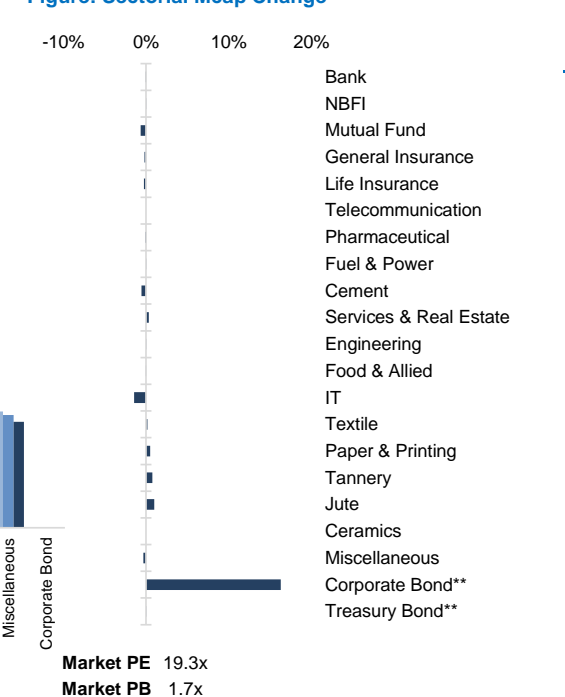


Figure: Sectorial Mcap Change



Market PE 19.3x

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	1,449	1,449	-0.64	-0.04%	35	683,638	8.8%	52.1	1.0%	12.5x	0.7x	GP	386,996	8.5%	0.1	12.5x	6.4x
NBFI	1,918	1,918	+0.18	+0.01%	23	186,658	2.4%	11.2	0.2%	NM	86.0x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	842	847	-5.54	-0.65%	37	39,821	0.5%	81.7	1.6%	NM	0.8x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,684	3,691	-7.03	-0.19%	42	107,472	1.4%	989.1	19.5%	19.9x	1.7x	SQURPHARM ^a	186,421	4.1%	89.8	9.8x	1.6x
Life Insurance	2,628	2,635	-6.48	-0.25%	15	73,462	0.9%	122.0	2.4%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.1	0.0%	15.9x	4.2x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,726	3,730	-4.55	-0.12%	33	721,994	9.3%	501.0	9.9%	20.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,701	1,701	+0.12	+0.01%	23	448,583	5.8%	261.7	5.2%	34.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,535	2,549	-14.32	-0.56%	7	121,733	1.6%	148.6	2.9%	20.6x	2.6x	LHBL	82,109	1.8%	106.0	12.9x	3.8x
Services & Real Esta	1,855	1,849	+6.23	+0.34%	8	73,307	0.9%	274.0	5.4%	23.0x	1.2x	BERGERPBL	81,463	1.8%	8.4	26.4x	6.5x
Engineering	4,496	4,494	+1.25	+0.03%	42	527,981	6.8%	470.9	9.3%	33.3x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,511	21,516	-5.19	-0.02%	21	398,029	5.1%	925.4	18.3%	20.1x	7.0x	BXPHARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,953	2,996	-43.17	-1.44%	11	38,496	0.5%	248.6	4.9%	32.1x	2.6x	BRACBANK	57,596	1.3%	0.4	7.7x	0.9x
Textile	1,657	1,654	+3.07	+0.19%	58	173,428	2.2%	188.1	3.7%	72.8x	1.2x	BEACONPHAR	56,595	1.2%	0.0	NM	9.5x
Paper & Printing	10,160	10,108	+51.39	+0.51%	6	39,145	0.5%	375.3	7.4%	56.0x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,177	3,153	+23.89	+0.76%	6	33,554	0.4%	102.1	2.0%	44.5x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,980	17,804	+176.25	+0.99%	3	4,398	0.1%	44.5	0.9%	NM	405.7x	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.2	0.0%	54.9x	1.9x	UNILEVERCL	38,936	0.9%	2.4	39.4x	18.8x
Miscellaneous	4,166	4,180	-13.54	-0.32%	14	226,850	2.9%	266.0	5.3%	26.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	466	401	+65.34	+16.31%	11	40,883	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	87	87	+0.02	+0.02%	242	3,232,758	41.5%	0.0	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
KPPL	15.4	+10.0%	98.9	NM	NM	SQURPHARMA	121,499	7.0%	9.8x	1.6x	FUWANGFOOD	34.7	+1.5%	352.6	NM	14.3x
EASTERNINS	76.2	+10.0%	228.9	27.1x	1.5x	BATBC	74,086	4.3%	15.4x	5.7x	EASTERNINS	76.2	+10.0%	228.9	27.1x	1.5x
OAL	12.5	+9.6%	97.6	NM	1.1x	BEXIMCO	69,196	4.0%	34.2x	1.2x	EMERALDOIL	124.7	+0.5%	171.0	63.0x	NM
SHYAMPSUG	169.2	+9.0%	26.1	NM	NM	RENATA	68,042	3.9%	66.1x	4.4x	MONOSPOOL	343.9	+4.4%	165.7	41.6x	6.6x
APEXFOOT	311.4	+8.7%	73.0	24.2x	1.3x	BXPHARMA	45,564	2.6%	13.8x	1.4x	UNIONINS	71.0	+0.3%	150.7	25.4x	3.7x
OIMEX	24.0	+8.1%	61.8	NM	2.2x	BEACONPHAR	39,617	2.3%	NM	9.5x	INTRACO	37.0	+7.2%	140.0	28.5x	3.0x
INTRACO	37.0	+7.2%	140.0	28.5x	3x	GP	38,700	2.2%	12.5x	6.4x	KBPPWBIL	48.1	-0.4%	132.3	NM	4.0x
CENTRALPHL	13.5	+6.3%	128.1	NM	2.4x	BRACBANK	30,964	1.8%	7.7x	0.9x	SAMORITA	110.1	+5.1%	128.4	NM	2.0x
AZIZPIPES	111.6	+5.6%	40.0	NM	NM	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	CENTRALPHL	13.5	+6.3%	128.1	NM	2.4x
RDFOOD	38.4	+5.2%	115.3	27.8x	2.4x	LHBL	28,562	1.6%	12.9x	3.8x	RDFOOD	38.4	+5.2%	115.3	27.8x	2.4x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CAPITECGBF	15.3	-10.0%	70.1	NM	1.5x	NBL	19,116	1.1%	NM	0.9x	MONOSPOOL	356.5	320.0	7.0	203	66.30
PREMIERCEM	46.3	-6.7%	17.9	NM	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	BRACBANK	33.0	32.6	8.0	930	30.44
ADNTEL	112.9	-5.1%	86.5	NM	3.6x	OLYMPIC	16,066	0.9%	20.2x	3.1x	CNATEX	10.1	9.2	20.0	1,624	15.05
KOHINOOR	479.4	-3.1%	28.1	38.9x	8.1x	ROBI	15,714	0.9%	52.6x	2.4x	GP	286.0	261.6	6.0	54	14.95
WMSHIPYARD	11.6	-2.5%	29.7	NM	0.6x	ALARABANK	14,357	0.8%	12.6x	1.1x	BSCCL	210.1	199.8	11.0	72	14.34
UNITEDINS	54.6	-2.5%	31.0	30.0x	1.7x	BSRMLTD	14,210	0.8%	9.2x	0.6x	POWERGRID	47.2	47.2	3.0	293	13.81
STANDARINS	52.4	-2.2%	42.0	21.8x	2.4x	SEAPEARL	13,733	0.8%	31.3x	10.5x	BEXIMCO	115.4	104.1	8.0	118	13.10
NTC	464.2	-2.1%	3.9	NM	NM	UPGDCL	13,547	0.8%	16.9x	4.4x	EMERALDOIL	130.0	130.0	3.0	100	13.00
HAKKANIPUL	70.2	-2.1%	32.3	51.6x	2.9x	PRIMEBANK	13,491	0.8%	5.2x	0.7x	SEAPPEARL	181.0	173.0	4.0	65	11.47
SKICL	57.7	-2.0%	53.2	22.5x	2.7x						RENATA	1,153.0	1,141.8	6.0	10	11.22
<div><div>* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.</div><div>** The base of the Bond Index starts at 100, starting from Jan 13, 2022</div><div>Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022</div></div>																

^a 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
MONOSPOOL	356.5	320.0	66.3	203	7
BRACBANK	33.0	32.6	30.4	930	8
CNATEX	10.1	9.2	15.1	1,624	20
GP	286.0	261.6	15.0	54	6
BSCCL	210.1	199.8	14.3	72	11
POWERGRID	47.2	47.2	13.8	293	3
BEXIMCO	115.4	104.1	13.1	118	8
EMERALDOIL	130.0	130.0	13.0	100	3
SEAPEARL	181.0	173.0	11.5	65	4
RENATA	1,153.0	1,141.8	11.2	10	6
DESHBANDHU	41.0	40.5	11.2	276	2
BATBC	556.4	479.8	10.9	20	4
SQURPHARMA	210.2	193.0	10.8	53	4
EASTERNINS	74.3	73.2	10.3	140	2
AIL	80.0	79.0	9.4	119	5
RELIANCINS	81.0	75.0	8.9	118	2
UNIONINS	77.7	76.8	8.5	110	2
JAMUNAOIL	177.0	177.0	7.8	44	5
NCCBANK	11.8	11.8	7.3	621	2
KBPPWBIL	46.7	46.4	7.2	155	6
ICBEPMF1S1	7.0	6.9	6.9	982	5
SOUTHEASTB	12.5	12.5	6.3	500	1
Total			394.8		201

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BEXIMCO		0.0%	10%	Record Date	13-Nov-23
BXPHARMA		0.0%	35%	Record Date	13-Nov-23
SPCERAMICS		0.0%	3%	Record Date	13-Nov-23
ETL		0.0%	2%	Record Date	14-Nov-23

Important DSE News

ADNTEL

(Q1 Un-audited): Consolidated EPS was Tk. 0.69 for July-September 2023 as against Tk. 1.01 for July-September 2022; Consolidated NOCFPS was Tk. 0.47 for July-September 2023 as against Tk. 0.24 for July-September 2022. Consolidated NAV per share was Tk. 31.23 as on September 30, 2023 and Tk. 30.54 as on June 30, 2023.

DN International Gateway Limited is a private limited company holding an International Internet Gateway (IIG) license issued by the Bangladesh Telecommunication Regulatory Commission (BTRC). This proposed vertical acquisition will lead to further success and growth for both the companies, strengthening their overall position in the market.

ECABLES

The Board of Directors has recommended 3% cash dividend for the year ended June 30, 2023. Date of AGM: 05.02.2024, Time: 11:00 AM, Venue: Digital Platform. Record Date: 13.12.2023. The Company has reported EPS of Tk. 0.49, NAV per share of Tk. 344.34 and NOCFPS of Tk. (1.46) for the year ended June 30, 2023 as against Tk. 0.34, Tk. 344.06 and Tk. 0.45 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. (0.45) for July-September 2023 as against Tk. 0.08 for July-September 2022; NOCFPS was Tk. 2.52 for July-September 2023 as against Tk. 1.73 for July-September 2022. NAV per share was Tk. 343.89 as on September 30, 2023 and Tk. 344.34 as on June 30, 2023.

GOLDENSON

The Board of Directors has recommended 1% Cash Dividend for the year ended June 30, 2023. Date of AGM: 28.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 29.11.2023. The Company has also reported Consolidated EPS of Tk. (0.75), Consolidated NAV per share of Tk. 18.99 and Consolidated NOCFPS of Tk. 1.00 for the year ended June 30, 2023 as against Tk. (0.29), Tk. 19.74 and Tk. 1.45 respectively for the year ended June 30, 2022.

LIBRAINFU

The company has announced their expansion of largest Brand New Dialysis Fluid Production Plant in the Country. The Board of Directors of the Company decided the largest Dialysis Fluid Production is going to start from late December 2023. All the permission from Regulatory Affairs body sought. The company has already imported brand new Machinery from China for the Plant. All Civil, Electricals and HVAC constructions have already been completed for going into large Production. The company has also informed that it will not only cater local demand and will also export large quantity of Dialysis Fluid productions for export purposes from this unit.

MARICO

The company has informed that Mr. Sumitava Basu has been nominated from Marico Limited, India as a Managing Director of Marico Bangladesh Limited with the letter of Nomination dated on 2nd November 2023. Marico Bangladesh Limited accepted the nomination and appointed Mr. Sumitava Basu as a Managing Director for three (3) years at its Board Meeting held on November 06, 2023. The first working day of Mr. Sumitava Basu with Marico Bangladesh Limited will be 31st December 2023.

NRBCBANK

Mr. A B M Abdul Mannan, one of the Sponsors of the company, has further informed that he has completed his sale of 4,49,99,511 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 31.10.2023.

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