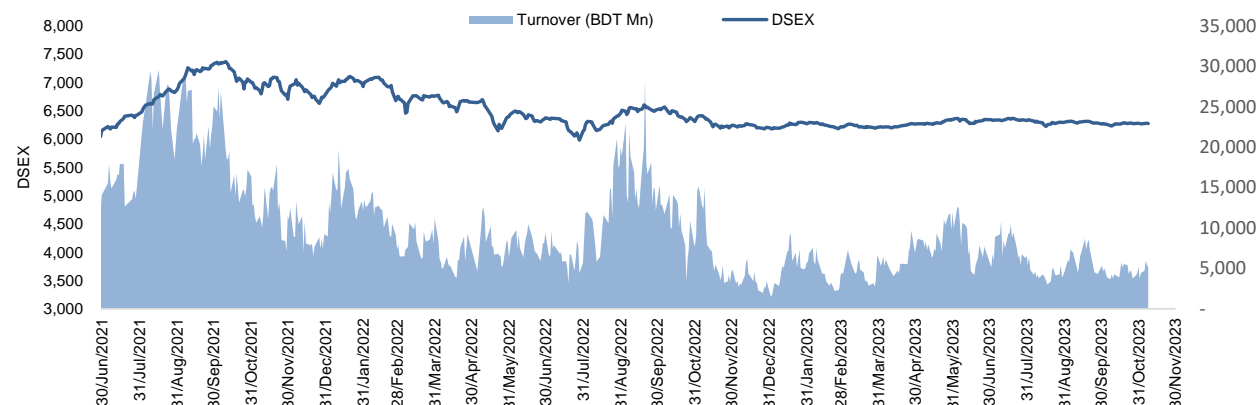


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.05%) lost 2.89 points and closed at 6,273.77. The blue-chip index DS30 (-0.07%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (-0.05%) closed at 2,129.11, 1,362.00, and 1,212.72 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.09% followed by Engineering (+0.06%). Bank experienced the highest loss of 0.11% followed by Pharmaceutical (-0.10%), NBFi (-0.04%), Food & Allied (-0.02%). Block trades contributed 5.6% of the overall market turnover. Fu Wang Food Ltd. (-2.6%) was the most traded share with a turnover of BDT 310 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,273.77	6,276.66	-2.89	-0.05%	+1.1%
DS30	2,129.11	2,130.56	-1.44	-0.07%	-3.0%
DSES	1,362.00	1,361.90	+0.10	+0.01%	+0.2%
CDSET	1,212.72	1,213.37	-0.65	-0.05%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	45	102	155	302
A Category (Equity)	22	70	105	197
B Category (Equity)	19	29	38	86
N Category (Equity)	0	1	0	1
Z Category (Equity)	4	2	12	18
Mutual Funds	0	2	16	18
Corporate Bonds	0	0	0	0
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,793,678	7,796,448	-0.0%
	Mn USD	70,213	70,238	-0.0%
Turnover	Mn BDT	5,160	5,458	-5.4%
	Mn USD	46	49	-5.4%
Volume	Mn Shares	120	129	-6.9%
No. of Trade		141,991	141,018	+0.7%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 08, 2023

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Figure: Sectorial Turnover (BDT Mn)

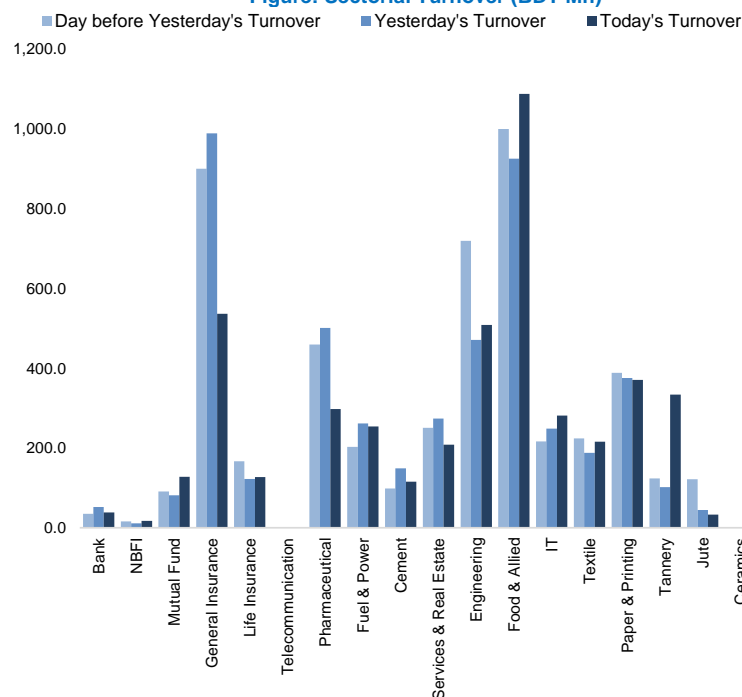
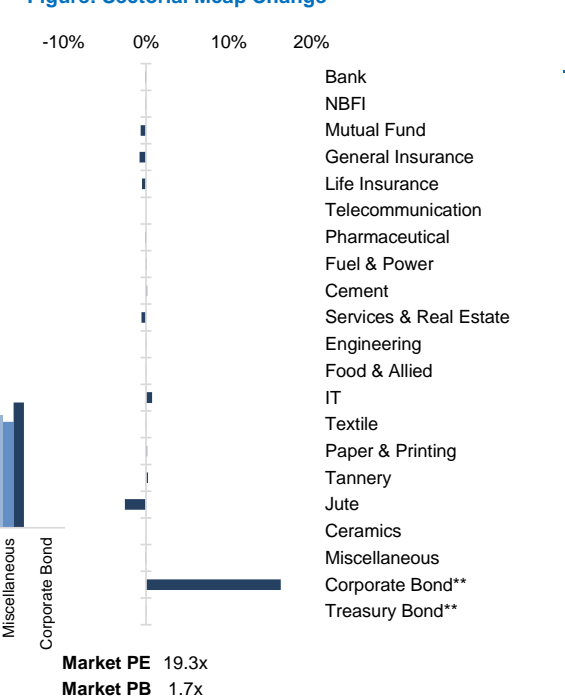


Figure: Sectorial Mcap Change



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	1,447	1,449	-1.54	-0.11%	35	682,913	8.8%	38.3	0.8%	12.4x	0.7x	GP	386,996	8.5%	0.7	12.5x	6.4x
NBFI	1,917	1,918	-0.71	-0.04%	23	186,589	2.4%	17.0	0.3%	NM	112.5x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	837	842	-5.36	-0.64%	37	39,568	0.5%	127.5	2.6%	NM	0.8x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,656	3,684	-28.46	-0.77%	42	106,642	1.4%	536.6	11.0%	19.8x	1.7x	SQURPHARMA	186,421	4.1%	43.8	9.8x	1.6x
Life Insurance	2,616	2,628	-12.34	-0.47%	15	73,117	0.9%	127.2	2.6%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.8	0.0%	15.9x	4.2x	RENATA	139,689	3.1%	0.2	66.1x	4.4x
Pharmaceutical	3,722	3,726	-3.82	-0.10%	33	721,254	9.3%	297.8	6.1%	20.1x	2.3x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,702	1,701	+1.47	+0.09%	23	448,970	5.8%	254.3	5.2%	32.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,538	2,535	+3.51	+0.14%	7	121,902	1.6%	115.2	2.4%	20.7x	2.6x	LHBL	81,761	1.8%	37.0	12.9x	3.8x
Services & Real Esta	1,845	1,855	-10.11	-0.54%	8	72,907	0.9%	208.1	4.3%	22.9x	1.2x	BERGERPBL	81,351	1.8%	4.2	26.4x	6.5x
Engineering	4,498	4,496	+2.75	+0.06%	42	528,304	6.8%	508.5	10.4%	33.4x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,506	21,511	-4.90	-0.02%	21	397,939	5.1%	1,087.6	22.3%	20.1x	7.0x	BXPHARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,975	2,953	+22.22	+0.75%	11	38,786	0.5%	281.5	5.8%	32.4x	2.6x	BRACBANK	57,596	1.3%	0.1	7.7x	0.9x
Textile	1,656	1,657	-0.37	-0.02%	58	173,389	2.2%	216.1	4.4%	72.7x	1.2x	BEACONPHAR	56,595	1.2%	0.0	NM	9.5x
Paper & Printing	10,174	10,160	+13.89	+0.14%	6	39,198	0.5%	370.7	7.6%	56.0x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,185	3,177	+7.68	+0.24%	6	33,635	0.4%	333.7	6.9%	44.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,519	17,980	-461.28	-2.57%	3	4,286	0.1%	32.9	0.7%	NM	395.3x	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.9	0.0%	54.9x	1.9x	UNILEVERCL	38,998	0.9%	1.3	39.4x	18.8x
Miscellaneous	4,164	4,166	-2.68	-0.06%	14	226,704	2.9%	314.4	6.5%	26.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	542	466	+75.99	+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**	87	87	+0.00	+0.00%	242	3,232,818	41.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	184.6	+9.1%	24.9	NM	NM
KPPL	16.8	+9.1%	166.5	NM	NM
PREMIERCEM	50.0	+8.0%	31.9	NM	0.8x
KBPPWBIL	51.6	+7.3%	118.4	NM	4.3x
INTECH	25.9	+7.0%	10.2	NM	48.9x
DESHBANDHU	42.5	+6.0%	111.7	NM	2.3x
ARAMITCEM	25.4	+5.4%	13.8	NM	26x
CVOPRL	191.6	+5.3%	153.6	NM	23.2x
BEACHHATCH	52.7	+5.0%	278.9	49.7x	4.8x
BDTHAI	14.3	+4.4%	20.1	NM	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CAPITECGBF	13.8	-9.8%	118.7	NM	1.4x
AMBEEPHA	875.1	-7.4%	19.7	NM	90x
LIBRAINFU	1,336.3	-6.2%	32.8	NM	1.1x
UNIONCAP	7.7	-4.9%	12.5	NM	NM
CRYSTALINS	96.3	-4.9%	22.2	31.5x	3.8x
MONOSPOOL	329.6	-4.2%	119.2	39.9x	6.3x
NTC	445.8	-4.0%	4.3	NM	NM
AZIZPIPES	107.3	-3.9%	23.7	NM	NM
IMAMBUTTON	186.1	-3.6%	12.4	NM	67.9x
SONALIANS	602.7	-3.4%	32.6	NM	5.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.8x	1.6x
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
BXPHARMA	45,564	2.6%	13.8x	1.4x
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%	4.3x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	20.1x	3.1x
ROBI	15,714	0.9%	52.6x	2.4x
ALARABANK	14,357	0.8%	12.6x	1.1x
BSRMLTD	14,210	0.8%	9.2x	0.6x
SEAPPEARL	13,733	0.8%	31.0x	10.4x
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
FUWANGFOOI	33.8	-2.6%	309.8	NM	13.9x
APEXFOOT	321.2	+3.1%	308.0	25.0x	1.3x
BEACHHATCH	52.7	+5.0%	278.9	49.7x	4.8x
KPPL	16.8	+9.1%	166.5	NM	NM
EMERALDOIL	123.7	-0.8%	158.7	62.5x	NM
CVOPRL	191.6	+5.3%	153.6	NM	23.2x
RDFOOD	39.7	+3.4%	125.0	28.8x	2.5x
MONOSPOOL	329.6	-4.2%	119.2	39.9x	6.3x
CAPITECGBF	13.8	-9.8%	118.7	NM	1.4x
KBPPWBIL	51.6	+7.3%	118.4	NM	4.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
APEXFOOT	315.0	309.9	5.0	133	41.92
BEACHHATCH	52.5	48.0	11.0	458	23.82
CRYSTALINS	103.0	98.4	2.0	200	20.14
BSCCL	218.8	215.0	3.0	73	16.02
EMERALDOIL	131.0	129.0	3.0	92	11.95
SEAPPEARL	212.4	174.0	5.0	54	10.70
AIL	82.0	80.1	4.0	117	9.53
SAIFPOWER	28.5	27.9	7.0	289	8.13
SONALILIFE	83.9	83.0	2.0	95	7.94
EASTERNINS	75.0	75.0	1.0	100	7.50

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
APEXFOOT	315.0	309.9	41.9	133	5
BEACHHATCH	52.5	48.0	23.8	458	11
CRYSTALINS	103.0	98.4	20.1	200	2
BSCCL	218.8	215.0	16.0	73	3
EMERALDOIL	131.0	129.0	12.0	92	3
SEAPEARL	212.4	174.0	10.7	54	5
AIL	82.0	80.1	9.5	117	4
SAIFPOWER	28.5	27.9	8.1	289	7
SONALILIFE	83.9	83.0	7.9	95	2
EASTERNINS	75.0	75.0	7.5	100	1
ADNTEL	124.0	124.0	7.1	58	2
NCCBANK	11.8	11.8	6.5	550	3
ANLIMAYARN	33.5	33.5	5.7	169	1
GENEXIL	69.8	67.0	5.3	78	3
PADMAOIL	212.0	212.0	5.3	25	2
CNATEX	9.2	9.2	5.2	565	7
RAHIMAFOOD	235.0	217.0	5.0	22	6
UNIONINS	76.5	70.9	4.8	65	3
SINOBANGLA	74.0	73.5	4.5	61	2
BATBC	518.8	479.8	3.9	8	5
MERCANBANK	12.1	12.0	3.7	308	4
BEXIMCO	115.4	104.5	3.6	34	5
Total			291.1		155

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ARGONDENIM		0.0%	10%	Record Date	14-Nov-23
MIRAKHTER		0.0%	13%	Record Date	15-Nov-23
RAHIMAFOOD		0.0%	10%	Record Date	15-Nov-23

Important DSE News

PADMAOIL

The Board of Directors has recommended 135% Cash Dividend for the year ended June 30, 2023. Date of AGM: 06.01.2024, Time: 11:00 AM, Venue: Digital Platform. Record Date: 28.11.2023. The Company has also reported EPS of Tk. 35.58, NAV per share of Tk. 203.46 and NOCFPS of Tk. (51.99) for the year ended June 30, 2023 as against Tk. 24.47, Tk. 180.38 and Tk. 98.15 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. 9.24 for July-September 2023 as against Tk. 7.20 for July-September 2022; NOCFPS was Tk. (5.38) for July-September 2023 as against Tk. (5.24) for July-September 2022. NAV per share was Tk. 212.70 as on September 30, 2023 and Tk. 203.46 as on June 30, 2023.

PHARMAID

The Board of Directors has recommended 10% cash dividend for the year ended June 30, 2023. Date of AGM: 28.12.2023, Time: 11:30 AM, Venue: Digital Platform. Record date: 07.12.2023. The Company has reported EPS of Tk. (2.05), NAV per share of Tk. 91.28 and NOCFPS of Tk. 2.33 for the year ended June 30, 2023 as against Tk. 11.14, Tk. 98.83 and Tk. 10.85 respectively for the year ended June 30, 2022.

BIFC

(Q1 Un-audited): EPS was Tk. (1.61) for January-March, 2022 as against Tk. (2.25) for January-March, 2021; NOCFPS was Tk. 0.09 for January-March, 2022 as against Tk. (0.83) for January-March, 2021. NAV per share was Tk. (108.44) as on March 31, 2022 and Tk. (104.62) as on March 31, 2021.

(Q2 Un-audited): EPS was Tk. (1.77) for April-June 2022 as against Tk. (2.24) for April-June 2021; EPS was Tk. (3.38) for January-June 2022 as against Tk. (4.49) for January-June 2021. NOCFPS was Tk. (0.59) for January-June 2022 as against Tk. (1.63) for January-June 2021. NAV per share was Tk. (110.22) as on June 30, 2022 and Tk. (106.86) as on June 30, 2021.

(Q3 Un-audited): EPS was Tk. (1.70) for July-September, 2022 as against Tk. (1.88) for July-September, 2021; EPS was Tk. (5.08) for January-September, 2022 as against Tk. (6.37) for January-September, 2021. NOCFPS was Tk. (1.39) for January-September, 2022 as against Tk. (2.28) for January-September, 2021. NAV per share was Tk. (111.92) as on September 30, 2022 and Tk. (108.74) as on September 30, 2021.

MEGHNACEM

The Board of Directors has recommended 5% Cash and 5% Stock Dividend for the year ended June 30, 2023. The Stock Dividend is subject to the approval from BSEC. Date of AGM: 27.12.2023, Time: 11:00 AM, Venue: Digital Platform. Link: <https://meghnacement.bdvirtualagm.com>; Record Date: 03.12.2023. The Company has also reported EPS of Tk. 0.53, NAV per share of Tk. 50.58 and NOCFPS of Tk. 54.43 for the year ended June 30, 2023 as against Tk. 1.91, Tk. 55.14 and Tk. 14.42 respectively for the year ended June 30, 2022.

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