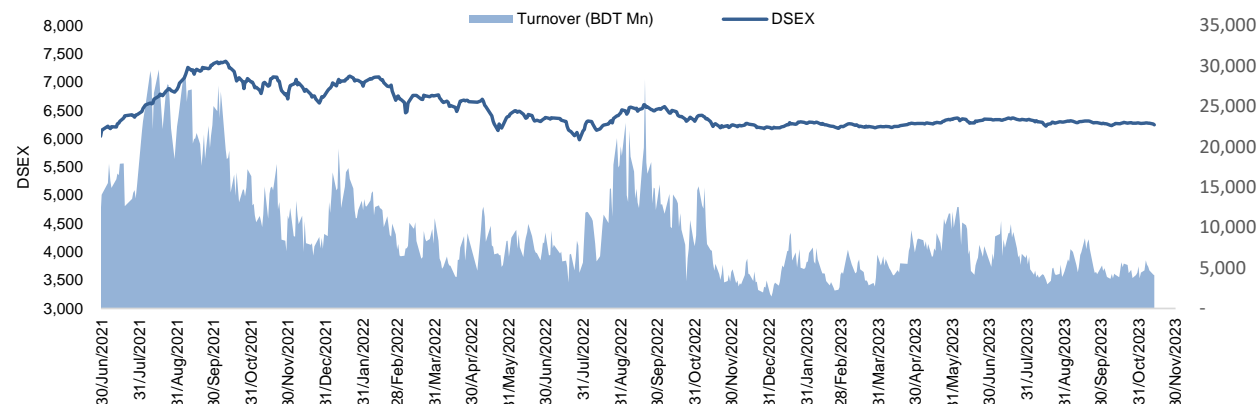


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.19%) lost 11.92 points and closed at 6,245.81. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.28%), and the large-cap index CDSET (-0.03%) closed at 2,118.30, 1,356.17, and 1,210.38 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.08% followed by NBFi (-0.02%). Food & Allied experienced the highest loss of 0.28% followed by Engineering (-0.25%), Pharmaceutical (-0.16%), Fuel & Power (-0.16%). Block trades contributed 4.7% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (-0.2%) was the most traded share with a turnover of BDT 188 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,245.81	6,257.73	-11.92	-0.19%	+0.6%
DS30	2,118.30	2,123.21	-4.92	-0.23%	-3.5%
DSES	1,356.17	1,359.92	-3.74	-0.28%	-0.2%
CDSET	1,210.38	1,210.75	-0.37	-0.03%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	42	105	159	306
A Category (Equity)	30	59	105	194
B Category (Equity)	8	42	44	94
N Category (Equity)	0	1	0	1
Z Category (Equity)	4	3	10	17
Mutual Funds	1	3	12	16
Corporate Bonds	0	0	1	1
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,777,090	7,783,508	
	Mn USD	70,064	70,122	-0.1%
Turnover	Mn BDT	4,100	4,190	
	Mn USD	37	38	-2.2%
Volume	Mn Shares	112	129	
				-13.1%
No. of Trade		127,927	118,974	+7.5%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 13, 2023

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Figure: Sectorial Turnover (BDT Mn)

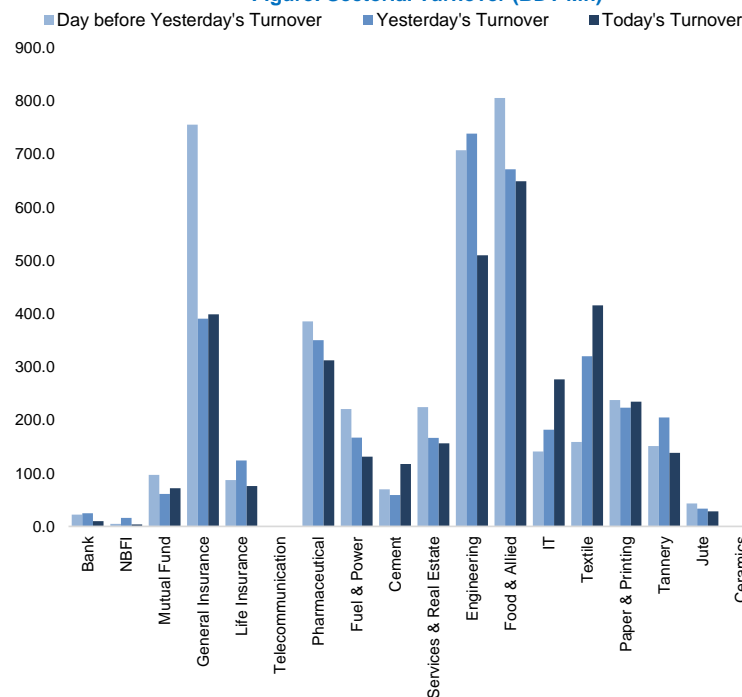
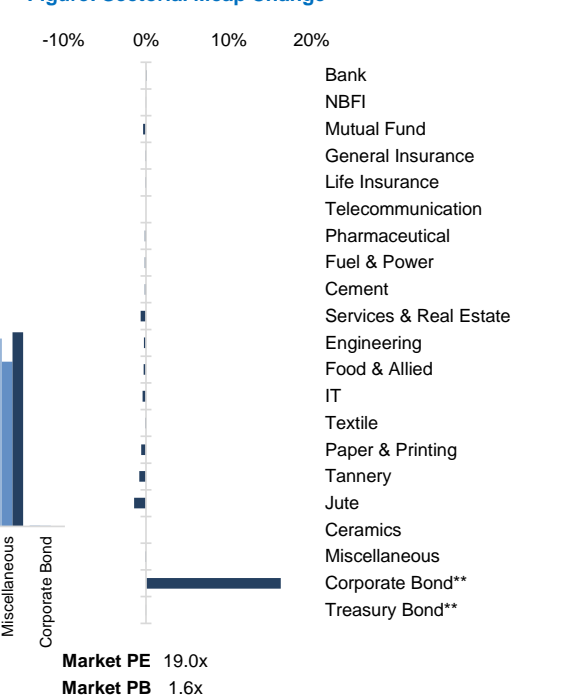


Figure: Sectorial Mcap Change



Market PE 19.0x

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	1,445	1,444	+1.59	+0.11%	35	681,761	8.8%	9.8	0.2%	12.4x	0.7x	GP	386,996	8.6%	0.0	12.5x	6.4x
NBFI	1,917	1,918	-0.35	-0.02%	23	186,589	2.4%	4.0	0.1%	NM	72.3x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	830	833	-3.01	-0.36%	37	39,235	0.5%	71.6	1.8%	NM	0.8x	BATBC	280,098	6.2%	0.0	15.4x	5.7x
General Insurance	3,594	3,597	-3.42	-0.10%	42	105,011	1.4%	398.9	10.2%	19.5x	1.7x	SQURPHARMA	186,066	4.1%	106.0	9.8x	1.6x
Life Insurance	2,585	2,588	-2.60	-0.10%	15	72,257	0.9%	76.0	1.9%	NM	NM	ROBI	157,138	3.5%	0.7	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.7	0.0%	15.9x	4.2x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,710	3,716	-5.93	-0.16%	33	717,197	9.2%	312.3	8.0%	19.8x	2.2x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,699	1,702	-2.70	-0.16%	23	448,273	5.8%	131.2	3.4%	38.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,532	2,536	-3.51	-0.14%	7	121,615	1.6%	117.4	3.0%	19.3x	2.6x	LHBL	81,296	1.8%	70.1	12.8x	3.8x
Services & Real Esta	1,791	1,802	-11.37	-0.63%	8	70,742	0.9%	156.3	4.0%	22.7x	0.9x	BERGERPBL	80,438	1.8%	3.5	26.1x	6.4x
Engineering	4,495	4,507	-11.21	-0.25%	42	527,971	6.8%	510.1	13.1%	27.8x	1.9x	ICB	74,119	1.6%	0.0	95.2x	1.6x
Food & Allied	21,393	21,453	-59.35	-0.28%	21	395,858	5.1%	649.2	16.6%	20.0x	6.9x	BXPHARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,856	2,868	-12.18	-0.42%	11	37,237	0.5%	276.5	7.1%	31.2x	2.5x	BRACBANK	57,596	1.3%	0.3	7.7x	0.9x
Textile	1,657	1,660	-2.02	-0.12%	58	171,654	2.2%	415.5	10.6%	70.8x	1.2x	BEACONPHAR	56,595	1.3%	0.0	NM	9.5x
Paper & Printing	10,016	10,074	-57.92	-0.57%	6	38,590	0.5%	234.6	6.0%	55.2x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,128	3,154	-25.30	-0.80%	6	35,501	0.5%	138.3	3.5%	45.5x	3.4x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	17,355	17,610	-254.68	-1.45%	3	4,246	0.1%	28.5	0.7%	NM	391.6x	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.1	0.0%	54.9x	1.9x	UNILEVERCL	38,845	0.9%	4.5	39.3x	18.8x
Miscellaneous	4,154	4,158	-3.53	-0.08%	14	226,203	2.9%	365.0	9.3%	25.9x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	853	733	+119.58	+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	-0.01	-0.01%	241	3,231,618	41.6%	9.3	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ZEALBANGLA	161.8	+10.0%	16.5	NM	NM
SHYAMPUSUG	216.0	+9.9%	41.0	NM	NM
DACCADYE	14.4	+7.5%	35.2	NM	0.4x
KARNAPHULI	35.3	+5.1%	41.3	20.9x	1.7x
CROWNCEMNT	77.5	+4.2%	25.9	11.4x	1.4x
PDL	11.2	+3.7%	117.9	93.3x	0.8x
MONOSPOOL	331.3	+3.2%	75.9	40.1x	6x
CRYSTALINS	100.1	+3.1%	47.9	32.7x	4.0x
GLOBALINS	33.9	+3.0%	7.9	25.1x	2.5x
APEXFOODS	329.8	+2.9%	14.6	37.0x	2.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OAL	11.6	-9.4%	53.1	NM	1.0x
WMSHIPYARD	11.7	-9.3%	50.3	NM	1x
CENTRALPHL	12.9	-9.2%	63.0	NM	2.3x
KPPL	15.4	-8.9%	115.9	NM	NM
NFML	15.1	-7.9%	21.3	NM	1.3x
YPL	26.5	-7.7%	103.1	NM	5.0x
BEACHHATCH	47.3	-7.3%	63.7	44.6x	4.3x
GEMINISEA	637.7	-7.2%	163.6	41.2x	25.5x
OIMEX	20.7	-7.2%	22.3	NM	7.1x
MIRACLEIND	41.8	-7.1%	47.5	NM	2.5x

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%	12.8x	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%	18.9x	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%	29.5x	9.9x
UPGDCL	13,547	0.8%	16.9x	4.4x
PRIMEBANK	13,491	0.8%	5.0x	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
KBPPWBIL	61.9	-0.2%	188.1	NM	5.2x
GEMINISEA	637.7	-7.2%	163.6	41.2x	25.5x
ADNTEL	97.9	-3.2%	140.5	NM	3.1x
BDTHAI	16.8	-2.3%	131.7	NM	0.6x
PDL	11.2	+3.7%	117.9	93.3x	0.8x
APEXFOOT	282.5	-3.0%	116.9	22.0x	1.2x
KPPL	15.4	-8.9%	115.9	NM	NM
EMERALDOIL	111.9	-1.4%	110.4	56.5x	NM
FUWANGFOOT	31.6	-2.5%	106.3	NM	13.0x
SQURPHARMA	209.9	-0.1%	106.0	9.8x	1.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CRYSTALINS	105.0	105.0	2.0	235	24.68
BRACBANK	32.7	32.7	1.0	400	13.08
ACIFORMULA	155.1	139.5	3.0	76	11.75
INDEXAGRO	103.6	93.3	10.0	110	10.88
APEXFOOT	301.0	301.0	2.0	35	10.51
FINEFOODS	126.0	126.0	1.0	59	7.43
KBPPWBIL	66.0	57.3	3.0	115	7.15
BEACONPHAR	223.6	223.6	9.0	28	6.15
PARAMOUNT	66.4	66.4	1.0	90	5.98
MALEKSPIN	26.4	24.4	9.0	213	5.53

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
CRYSTALINS	105.0	105.0	24.7	235	2
BRACBANK	32.7	32.7	13.1	400	1
ACIFORMULA	155.1	139.5	11.7	76	3
INDEXAGRO	103.6	93.3	10.9	110	10
APEXFOOT	301.0	301.0	10.5	35	2
FINEFOODS	126.0	126.0	7.4	59	1
KBPPWBIL	66.0	57.3	7.2	115	3
BEACONPHAR	223.6	223.6	6.1	28	9
PARAMOUNT	66.4	66.4	6.0	90	1
MALEKSPIN	26.4	24.4	5.5	213	9
RUPALILIFE	96.5	96.5	5.1	53	1
EGEN	44.9	44.9	4.9	109	1
FORTUNE	79.9	69.7	4.8	63	4
AIL	86.3	80.5	4.8	58	4
AL-HAJTEX	142.0	142.0	4.5	32	1
SONALIPAPR	629.5	569.9	4.2	7	4
DELTALIFE	142.9	138.0	3.9	28	3
SONALILIFE	69.5	69.5	3.8	55	1
LHBL	77.0	77.0	3.6	47	1
ALIF	12.2	12.0	3.0	245	5
ACMELAB	84.5	83.0	2.9	35	5
DSSL	16.8	16.8	2.5	148	1
Total			194.6		129

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
TITASGAS		0.0%	5%	Record Date	15-Nov-23
QUASEMIND		0.0%	2%	Record Date	15-Nov-23
ITC		0.0%	10%	Record Date	15-Nov-23
NTC		0.0%	0%	Record Date	15-Nov-23
FEKDIL		0.0%	10%	Record Date	16-Nov-23
SQUARETEXT		0.0%	10%	Record Date	16-Nov-23
SQURPHARMA		0.0%	105%	Record Date	16-Nov-23
BEACONPHAR		0.0%	16%	Record Date	16-Nov-23
MLDYEING		0.0%	2%	Record Date	16-Nov-23
BEACHHATCH		0.0%	2%	Record Date	16-Nov-23
INDEXAGRO		0.0%	20%	Record Date	16-Nov-23
AZIZPIPES		0.0%	0%	Record Date	16-Nov-23
MEGCONMILK		0.0%	0%	Record Date	16-Nov-23

Important DSE News

ETL

(Q1 Un-audited): Consolidated EPS was Tk. 0.01 for July-September 2023 as against Tk. (0.36) for July-September 2022; Consolidated NOCFPS was Tk. (0.61) for July-September 2023 as against Tk. 0.54 for July-September 2022. Consolidated NAV per share was Tk. 12.65 as on September 30, 2023 and Tk. 12.66 as on June 30, 2023.

BENGALWTL

(Q1 Un-audited): EPS was Tk. 0.15 for July-September 2023 as against Tk. 0.16 for July-September 2022; NOCFPS was Tk. 0.64 for July-September 2023 as against Tk. 0.49 for July-September 2022. NAV per share was Tk. 25.83 as on September 30, 2023 and Tk. 25.68 as on June 30, 2023.

BSRMSTEEL

(Q1 Un-audited): EPS was Tk. 1.21 for July-September 2023 as against Tk. (0.93) for July-September 2022; NOCFPS was Tk. 4.86 for July-September 2023 as against Tk. (2.93) for July-September 2022. NAV per share was Tk. 74.54 as on September 30, 2023 and Tk. 73.32 as on June 30, 2023.

MIRAKHTER

(Q1 Un-audited): Consolidated EPS was Tk. 0.27 for July-September 2023 as against Tk. 0.27 for July-September 2022; NOCFPS was Tk. 2.65 for July-September 2023 as against Tk. 0.35 for July-September 2022. NAV per share was Tk. 50.07 as on September 30, 2023 and Tk. 49.81 as on June 30, 2023.

ARGONDENIM

(Q1 Un-audited): EPS was Tk. 0.29 for July-September 2023 as against Tk. 0.19 for July-September 2022; NOCFPS was Tk. 3.01 for July-September 2023 as against Tk. 2.20 for July-September 2022. NAV per share was Tk. 24.42 as on September 30, 2023 and Tk. 24.13 as on June 30, 2023.

RAHIMTEXT

(Q1 Un-audited): EPS was Tk. 0.12 for July-September 2023 as against Tk. (2.01) for July-September 2022; NOCFPS was Tk. 0.52 for July-September 2023 as against Tk. (6.49) for July-September 2022. NAV per share was Tk. 23.91 as on September 30, 2023 and Tk. 23.79 as on June 30, 2023.

LOVELLO

(Q1 Un-audited): EPS was Tk. 0.32 for July-September 2023 as against Tk. 0.56 for July-September 2022; NOCFPS was Tk. 0.98 for July-September 2023 as against Tk. 1.40 for July-September 2022. NAV per share was Tk. 13.25 as on September 30, 2023 and Tk. 12.94 as on June 30, 2023.

MALEKSPIN

(Q1 Un-audited): Consolidated EPS was Tk. 1.90 for July-September 2023 as against Tk. 1.21 for July-September 2022; Consolidated NOCFPS was Tk. 2.29 for July-September 2023 as against Tk. (1.88) for July-September 2022. Consolidated NAV per share was Tk. 48.67 as on September 30, 2023 and Tk. 46.77 as on June 30, 2023.

RAHIMAFOOD

(Q1 Un-audited): EPS was Tk. 0.26 for July-September 2023 as against Tk. 0.21 for July-September 2022; NOCFPS was Tk. 1.16 for July-September 2023 as against Tk. 0.72 for July-September 2022. NAV per share was Tk. 10.58 as on September 30, 2023 and Tk. 9.33 as on June 30, 2023.

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JAMUNAOIL

The Board of Directors has recommended 130% cash dividend for the year ended June 30, 2023. Date of AGM: 27.01.2024, Time: 11:00 AM, Venue: Digital Platform; Record Date: 14.12.2023. The Company has also reported EPS of Tk. 30.87, NAV per share of Tk. 205.49 and NOCFPS of Tk. 109.01 for the year ended June 30, 2023 as against Tk. 16.87, Tk. 189.00 and Tk. 101.43 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. 7.59 for July-September 2023 as against Tk. 5.98 for July-September 2022; NOCFPS was Tk. 40.85 for July-September 2023 as against Tk. 130.37 for July-September 2022. NAV per share was Tk. 213.29 as on September 30, 2023 and Tk. 205.49 as on June 30, 2023.

CROWNCEMNT

(Q1 Un-audited): EPS was Tk. 2.32 for July-September 2023 as against Tk. (0.36) for July-September 2022; NOCFPS was Tk. 0.93 for July-September 2023 as against Tk. 2.98 for July-September 2022. NAV per share was Tk. 54.54 as on September 30, 2023 and Tk. 52.22 as on June 30, 2023.

GSPFINANCE

The Board of Directors has recommended No dividend for the year ended December 31, 2022. The Board of Directors of the company also decided to amend the name clause (clause no: 01) of the Memorandum of Association (MOA) of the company subject to approval of the regulatory authorities and the shareholders in the 10th Extra ordinary General Meeting (EGM). Proposed name of the company: "GSP Finance Company (Bangladesh) PLC". Date of EGM and AGM: 26.12.2023, Time: 11:30 AM (EGM), 12:00 PM (AGM), Venue: Digital Platform. Record Date for EGM & AGM: 30.11.2023. The Company has also reported Consolidated EPS of Tk. (1.08), Consolidated NAV per share of Tk. 27.78 and Consolidated NOCFPS of Tk. (1.15) for the year ended December 31, 2022 as against Tk. 1.44, Tk. 21.35 and Tk. 0.84 respectively for the year ended December 31, 2021.

AGNISYSL

(Q1 Un-audited): EPS was Tk. 0.28 for July-September 2023 as against Tk. 0.38 for July-September 2022; NOCFPS was Tk. 0.31 for July-September 2023 as against Tk. 0.42 for July-September 2022. NAV per share was Tk. 16.23 as on September 30, 2023 and Tk. 15.95 as on June 30, 2023.

WMSHIPYARD

(Q3 Un-audited): EPS was Tk. (0.02) for January-March 2023 as against Tk. (0.04) for January-March 2022; EPS was Tk. (0.09) for July 2022-March 2023 as against Tk. (0.10) for July 2021-March 2022. NOCFPS was Tk. 0.83 for July 2022-March 2023 as against Tk. 0.44 for July 2021-March 2022. NAV per share was Tk. 20.17 as on March 31, 2023 and Tk. 21.08 as on June 30, 2022.

ORIONPHARM

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2023. The Board has also considered and recommended the proposal for approval of the shareholders regarding Related Party Transaction for the Financial year ended June 30, 2023 and in this regard, the Board also advised to hold an EGM. Date of AGM and EGM: 26.12.2023, Time of AGM and EGM: 3:00 PM and 3:45 PM respectively, Venue: Digital Platform. Record Date for AGM and EGM: 03.12.2023. The Company has reported Consolidated EPS of Tk. 2.74, Consolidated NAV per share (Including Revaluation Surplus) of Tk. 88.99, Consolidated NAV per share (Excluding Revaluation Surplus) of Tk. 81.15 and Consolidated NOCFPS of Tk. 10.65 for the year ended June 30, 2023 as against Tk. 3.62, Tk. 82.53, Tk. 74.62 and Tk. 4.96 respectively for the year ended June 30, 2022.

BSRMLTD

(Q1 Un-audited): Consolidated EPS was Tk. 2.20 for July-September 2023 as against Tk. (5.51) for July-September 2022; Consolidated NOCFPS was Tk. 13.11 for July-September 2023 as against Tk. 4.27 for July-September 2022. Consolidated NAV per share was Tk. 142.67 as on September 30, 2023 and Tk. 140.46 as on June 30, 2023.

AAMRATECH

(Q1 Un-audited): EPS was Tk. 0.19 for July-September, 2023 as against Tk. 0.36 (Restated) for July-September, 2022. NOCFPS was Tk. (0.39) for July-September, 2023 as against Tk. (0.36) (Restated) for July-September, 2022. NAV per share was Tk. 23.04 as on September 30, 2023 and Tk. 22.85 (Restated) as on June 30, 2023.

OLYMPIC

(Q1 Un-audited): EPS was Tk. 2.81 for July-September 2023 as against Tk. 2.33 for July-September 2022; NOCFPS was Tk. 4.42 for July-September 2023 as against Tk. 4.32 for July-September 2022. NAV per share was Tk. 52.93 as on September 30, 2023 and Tk. 49.16 as on September 30, 2022.

AAMRANET

(Q1 Un-audited): EPS was Tk. 1.24 for July-September 2023 as against Tk. 0.99 (restated) for July-September 2022; NOCFPS was Tk. 0.27 for July-September 2023 as against Tk. 0.66 (restated) for July-September 2022. NAV per share was Tk. 38.25 as on September 30, 2023 and Tk. 38.11 as on June 30, 2023.

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