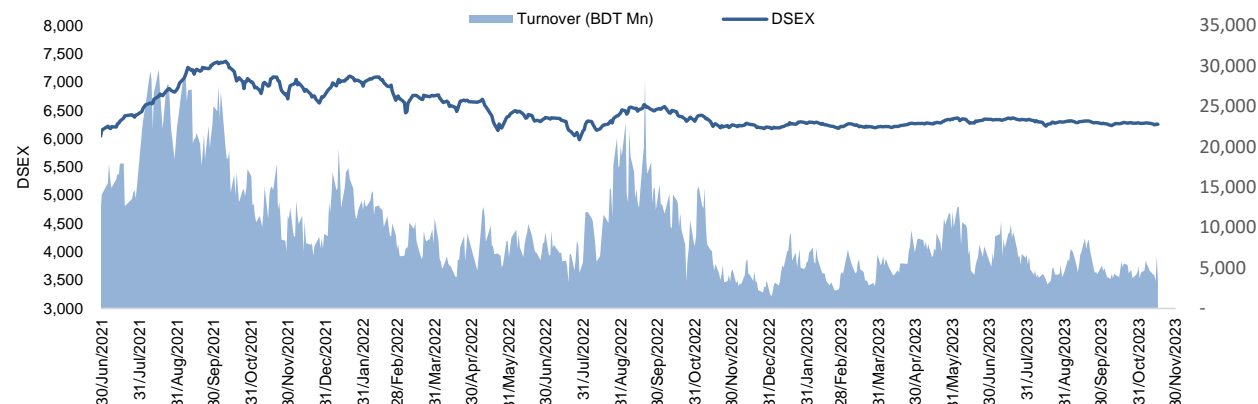


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 1.03 points and closed at 6,257.15. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (-0.06%), and the large-cap index CDSET (-0.03%) closed at 2,118.94, 1,359.28, and 1,212.08 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.06%, followed by Fuel & Power (+0.03%), Pharmaceutical (+0.02%), Engineering (+0.02%), and Food & Allied (-0.10%), respectively. Block trades contributed 6.2% of the overall market turnover. Fu Wang Food Ltd. (-2.4%) was the most traded share with a turnover of BDT 171 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,257.15	6,258.18	-1.03	-0.02%	+0.8%
DS30	2,118.94	2,120.75	-1.81	-0.09%	-3.5%
DSES	1,359.28	1,360.14	-0.86	-0.06%	+0.0%
CDSET	1,212.08	1,212.48	-0.40	-0.03%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	69	62	162	293
A Category (Equity)	38	42	99	179
B Category (Equity)	28	15	55	98
N Category (Equity)	0	1	0	1
Z Category (Equity)	3	4	8	15
Mutual Funds	0	3	13	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	7,752,425	7,752,364	+0.0%
	Mn USD	69,842	69,841	
Turnover	Mn BDT	3,608	6,450	-44.1%
	Mn USD	33	58	
Volume	Mn Shares	122	189	-35.2%
No. of Trade		110,952	117,620	-5.7%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 16, 2023

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Figure: Sectorial Turnover (BDT Mn)

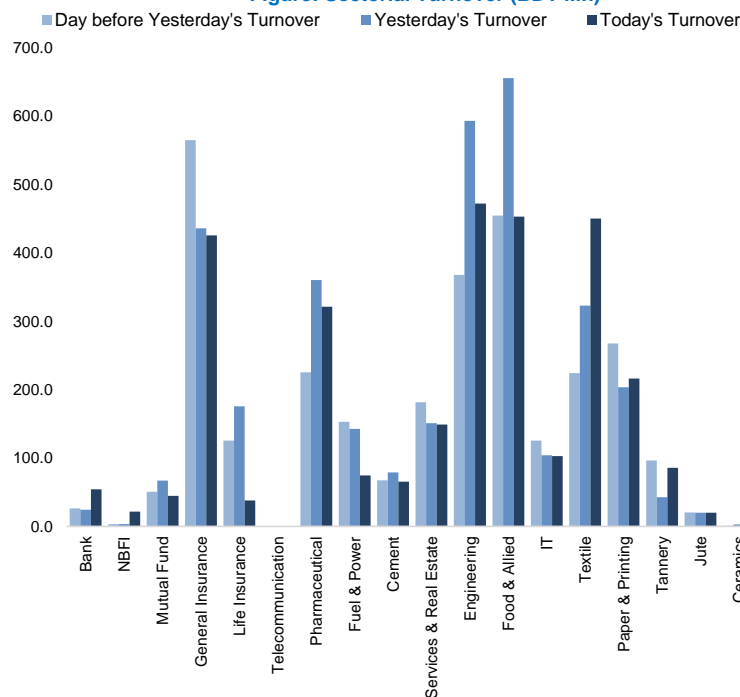
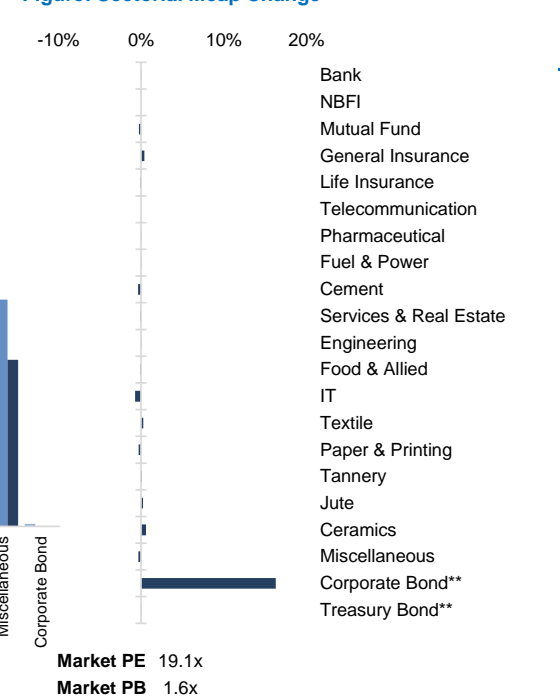


Figure: Sectorial Mcap Change



Market PE 19.1x

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	1,447	1,446	+0.80	+0.06%	35	682,619	8.8%	54.1	1.6%	12.4x	0.7x	GP	386,996	8.5%	0.1	12.5x	6.4x
NBFI	1,918	1,918	-	-	23	186,624	2.4%	21.7	0.6%	NM	72.3x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	831	833	-2.16	-0.26%	37	39,315	0.5%	44.8	1.3%	NM	0.8x	BATBC	280,098	6.2%	0.2	15.4x	5.7x
General Insurance	3,632	3,617	+14.90	+0.41%	42	106,118	1.4%	425.6	12.6%	19.7x	1.7x	SQURPHARMA	187,839	4.1%	0.0	9.6x	1.5x
Life Insurance	2,591	2,593	-1.85	-0.07%	15	72,430	0.9%	38.0	1.1%	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%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,718	3,717	+0.70	+0.02%	33	718,582	9.3%	321.5	9.5%	19.5x	2.2x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,701	1,701	+0.43	+0.03%	23	448,760	5.8%	74.4	2.2%	38.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,530	2,539	-8.80	-0.35%	7	121,536	1.6%	65.5	1.9%	18.1x	2.6x	LHBL	80,715	1.8%	46.5	12.7x	3.8x
Services & Real Estate	1,787	1,788	-1.58	-0.09%	8	70,591	0.9%	149.1	4.4%	23.2x	0.9x	BERGERPBL	80,238	1.8%	3.1	26.0x	6.4x
Engineering	4,500	4,500	+0.75	+0.02%	42	528,544	6.8%	472.4	14.0%	27.7x	1.9x	ICB	74,119	1.6%	0.0	95.2x	1.6x
Food & Allied	21,371	21,392	-20.50	-0.10%	21	395,448	5.1%	453.0	13.4%	19.9x	6.9x	BXPHERMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,812	2,832	-19.67	-0.69%	11	36,659	0.5%	102.8	3.0%	29.0x	2.4x	BRACBANK	57,596	1.3%	0.0	7.7x	0.9x
Textile	1,665	1,660	+4.70	+0.28%	58	172,445	2.2%	450.2	13.3%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,057	10,085	-27.73	-0.27%	6	38,749	0.5%	216.2	6.4%	58.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,113	3,110	+3.26	+0.10%	6	35,247	0.5%	85.6	2.5%	58.6x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,385	17,342	+42.66	+0.25%	3	4,253	0.1%	19.9	0.6%	NM	392.3x	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	684	680	+4.08	+0.60%	5	31,635	0.4%	146.8	4.3%	55.2x	1.9x	UNILEVERCL	38,876	0.9%	0.6	39.3x	18.8x
Miscellaneous	4,165	4,178	-13.46	-0.32%	14	226,753	2.9%	243.6	7.2%	26.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	1,342	1,154	+188.17	+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**	86	86	+0.00	+0.01%	241	3,201,973	41.4%	0.1	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KPPL	20.3	+9.7%	141.2	NM	NM
PDL	12.7	+9.5%	116.6	NM	0.9x
ETL	10.6	+9.3%	75.4	23.0x	0.8x
SHYAMPSUG	236.0	+8.4%	74.1	NM	NM
CONTININS	43.6	+7.7%	79.3	75.2x	2.0x
AMBEEPHA	843.8	+7.4%	13.0	NM	81.7x
ZAHEENSPIN	10.6	+7.1%	57.8	NM	2x
DACCADYE	14.8	+6.5%	34.0	NM	0.4x
LIBRAINFU	1,231.8	+6.2%	40.8	NM	1.0x
MONNOCERA	102.9	+5.1%	146.5	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%	9.6x	1.5x
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
BXPHERMA	45,564	2.6%	13.8x	1.4x
BEACONPHAR	39,617	2.3%	86.9x	9.0x
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%	12.7x	3.8x
PUBALIBANK	19,162	1.1%	4.2x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	18.6x	2.9x
ROBI	15,714	0.9%	52.6x	2.4x
ALARABANK	14,357	0.8%	12.6x	1.1x
BSRMLTD	14,210	0.8%	5.2x	0.6x
SHAPEARL	13,733	0.8%	30.5x	10.2x
UPGDCL	13,547	0.8%	16.9x	4.4x
PRIMEBANK	13,491	0.8%	5.1x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOI	32.1	-2.4%	171.2	NM	12.3x
EMERALDOIL	114.2	-5.5%	150.6	57.7x	NM
MONNOCERA	102.9	+5.1%	146.5	NM	1.2x
KPPL	20.3	+9.7%	141.2	NM	NM
BDTHAI	19.6	-0.5%	125.3	NM	0.7x
CENTRALPHL	15.2	+4.8%	124.2	NM	2.7x
PDL	12.7	+9.5%	116.6	NM	0.9x
KBPPWBIL	68.6	-0.6%	83.4	NM	5.8x
SKTRIMS	30.2	+3.4%	80.7	26.7x	1.9x
CONTININS	43.6	+7.7%	79.3	75.2x	2.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ARAMIT	265.5	-5.8%	17.9	NM	1.9x
EMERALDOIL	114.2	-5.5%	150.6	57.7x	NM
USMANIAGL	53.1	-4.3%	0.8	NM	0.7x
JUTESPINN	328.1	-4.3%	1.1	NM	NM
CAPITECGBF	12.4	-3.9%	40.8	NM	1.2x
KAY&QUE	200.9	-3.8%	3.3	NM	2.6x
BDWELDING	22.3	-3.0%	6.0	NM	1.9x
SAMORITA	93.0	-2.8%	38.1	NM	1.7x
AIL	83.0	-2.6%	77.3	42.8x	3.5x
MONOSPOOL	301.2	-2.5%	36.1	33.9x	5.5x

* 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)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MERCANBANK	12.0	12.0	2.0	3,000	36.00
BRACBANK	32.9	32.3	4.0	1,016	32.83
DESHBANDHU	40.0	39.5	9.0	397	15.86
ACMEPL	31.9	31.9	4.0	484	15.42
SPCL	61.0	59.0	11.0	162	9.63
AIL	82.0	78.0	3.0	89	7.26
LHBL	63.2	63.2	1.0	96	6.07
ACMELAB	83.6	83.0	10.0	70	5.84
BXPHERMA	131.6	131.6	4.0	38	5.00
MALEKSPIN	24.4	24.4	6.0	193	4.71

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MERCANBANK	12.0	12.0	36.0	3,000	2
BRACBANK	32.9	32.3	32.8	1,016	4
DESHBANDHU	40.0	39.5	15.9	397	9
ACMEPL	31.9	31.9	15.4	484	4
SPCL	61.0	59.0	9.6	162	11
AIL	82.0	78.0	7.3	89	3
LHBL	63.2	63.2	6.1	96	1
ACMELAB	83.6	83.0	5.8	70	10
BXPHARMA	131.6	131.6	5.0	38	4
MALEKSPIN	24.4	24.4	4.7	193	6
EASTERNINS	70.5	70.5	4.6	65	3
GENEXIL	67.0	63.0	4.2	64	4
ACFL	24.1	24.1	3.9	164	5
JANATAINS	37.9	37.9	3.8	100	1
SINGERBD	164.0	144.0	3.7	24	4
SEAPEARL	186.1	175.1	3.6	21	4
GP	261.6	261.6	3.5	13	3
FORTUNE	74.9	69.1	3.2	43	3
SILCOPHL	24.5	21.3	3.2	142	3
BDTHAI	20.5	17.8	3.1	167	3
SAIHAMTEX	17.5	15.9	2.7	160	2
HRTEX	115.8	115.0	2.6	22	2
Total			222.5		153

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RUNNERAUTO		0.0%	0%	Record Date	19-Nov-23
NAVANAPHAR		0.0%	13%	Record Date	19-Nov-23
MALEKSPIN		0.0%	0%	Record Date	19-Nov-23
SHASHADNIM		0.0%	10%	Record Date	19-Nov-23
NPLOYMER		0.0%	11%	Record Date	19-Nov-23
RANFOUNDRY		0.0%	23%	Record Date	19-Nov-23
ZAHINTEX		0.0%	0%	Record Date	19-Nov-23
IFADAUTOS		0.0%	10%	Record Date	19-Nov-23
AMCL(PRAN)		0.0%	32%	Record Date	19-Nov-23
IBP		0.0%	0%	Record Date	19-Nov-23
HWAWELLTEX		0.0%	25%	Record Date	19-Nov-23
RAHIMTEXT		0.0%	0%	Record Date	19-Nov-23
STYLECRAFT		0.0%	0%	Record Date	19-Nov-23
AGNISYSL		0.0%	5%	Record Date	19-Nov-23
CROWNCEMNT		0.0%	20%	Record Date	20-Nov-23
KDSALTD		0.0%	10%	Record Date	20-Nov-23
BANGAS		0.0%	3%	Record Date	20-Nov-23

Important DSE News

FUWANGFOOD

(Q1 Un-audited): EPS was Tk. (0.19) for July-September, 2023 as against Tk. 0.04 for July-September, 2022; NOCFPS was Tk. 0.08 for July-September, 2023 as against Tk. 0.15 for July-September, 2022. NAV per share was Tk. 2.61 as on September 30, 2023 and Tk. 3.70 as on September 30, 2022.

DOMINAGE

(Q1 Un-audited): EPS was Tk. 0.04 for July-September 2023 as against Tk. 0.03 for July-September 2022; NOCFPS was Tk. 0.02 for July-September 2023 as against Tk. 0.53 for July-September 2022. NAV per share was Tk. 17.18 as on September 30, 2023 and Tk. 17.14 as on June 30, 2023.

The Board of Directors has recommended 0.50% Cash dividend for general shareholders other than Sponsors/Directors for the year ended June 30, 2023. The Sponsors/Directors hold 30,980,609 shares of the Company and the cash payable to the general shareholders is Tk. 3,580,970.00. Date of AGM: 30.12.2023, Time: 3:00 PM, Venue: Digital Platform. Record Date: 06.12.2023. The Company has also reported EPS of Tk. 0.04, NAV per share of Tk. 17.14 and NOCFPS of Tk. 1.40 for the year ended June 30, 2023 as against Tk. 0.55, Tk. 17.23 and Tk. 2.61 respectively for the year ended June 30, 2022.

HRTEX

(Q1 Un-audited): EPS was Tk. 0.94 for July-September 2023 as against Tk. 0.89 (Restated) for July-September 2022; NOCFPS was Tk. 2.83 for July-September 2023 as against Tk. (0.31) for July-September 2022. NAV per share was Tk. 42.26 as on September 30, 2023 and Tk. 41.33 as on June 30, 2023.

ARAMITCEM

The Board of Directors has recommended No Dividend for the year ended June 30, 2023. Date of AGM: 30.12.2023, Time: 12:00 PM, Venue: Digital Platform. Record date: 06.12.2023. The Company has also reported EPS of Tk. (16.69), NAV per share of Tk. (4.03) and NOCFPS of Tk. 1.50 for the year ended June 30, 2023 as against Tk. (16.88), Tk. 12.58 and Tk. 5.88 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. (4.02) for July-September, 2023 as against Tk. (2.64) for July-September, 2022. NOCFPS was Tk. (3.46) for July-September, 2023 as against Tk. (1.98) for July-September, 2022. NAV per share was Tk. (8.49) as on September 30, 2023 and Tk. (4.03) as on June 30, 2023.

INTECH

(Q1 Un-audited): EPS was Tk. (0.16) for July-September 2022 as against Tk. (0.14) for July-September 2021. NOCFPS was Tk. (0.08) for July-September 2022 as against Tk. (0.10) for July-September 2021. NAV per share was Tk. 0.36 as on September 30, 2022 and Tk. 0.53 as on June 30, 2022.

(Q2 Un-audited): EPS was Tk. (0.05) for October-December 2022 as against Tk. (0.28) for October-December 2021; EPS was Tk. (0.35) for July-December 2022 as against Tk. (0.36) for July-December 2021. NOCFPS was Tk. (0.17) for July-December 2022 as against Tk. (0.21) for July-December 2021. NAV per share was Tk. 0.17 as on December 31, 2022 and Tk. 0.53 as on June 30, 2022.

(Q3 Un-audited): EPS was Tk. (0.18) for January-March 2023 as against Tk. (0.22) for January-March 2022. EPS was Tk. (0.54) for July 2022-March 2023 as against Tk. (0.54) for July 2021-March 2022. NOCFPS was Tk. (0.21) for July 2022-March 2023 as against Tk. (0.27) for July 2021-March 2022. NAV per share was Tk. (0.01) as on March 31, 2023 and Tk. 0.53 as on June 30, 2022.

The Board of Directors has recommended No dividend for the year ended June 30, 2023. Date of AGM: 31.12.2023, Time: 3:00 PM, Venue: Digital Platform. Record date: 07.12.2023. The Company has also reported EPS of Tk. (0.74), NAV per share of Tk. (0.21) and NOCFPS of Tk. (0.29) for the year ended June 30, 2023 as against Tk. (1.15), Tk. 0.53 and Tk. (0.36) respectively for the year ended June 30, 2022.

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SALVOCHEM

(Q1 Un-audited): EPS was Tk. 0.74 for July-September 2023 as against Tk. 0.63 for July-September 2022; NOCFPS was Tk. 0.29 for July-September 2023 as against Tk. 0.25 for July-September 2022. NAV per share was Tk. 15.66 as on September 30, 2023 and Tk. 14.92 as on June 30, 2023.

SAPORTL

(Q1 Un-audited): Consolidated EPS was Tk. 0.36 for July-September 2023 as against Tk. 0.46 for July-September 2022; Consolidated NOCFPS was Tk. 0.56 for July-September 2023 as against Tk. 0.66 for July-September 2022. Consolidated NAV per share was Tk. 33.47 as on September 30, 2023 and Tk. 33.11 as on June 30, 2023.

ALIF

(Q1 Un-audited): EPS was Tk. 0.07 for July-September 2023 as against Tk. 0.16 for July-September 2022; NOCFPS was Tk. (0.44) for July-September 2023 as against Tk. 0.51 for July-September 2022. NAV per share was Tk. 14.95 as on September 30, 2023 and Tk. 14.88 as on June 30, 2023.

AIL

(Q1 Un-audited): EPS was Tk. 0.53 for July-September 2023 as against Tk. 0.39 for July-September 2022; NOCFPS was Tk. 0.09 for July-September 2023 as against Tk. 0.07 for July-September 2022. NAV per share was Tk. 23.72 as on September 30, 2023 and Tk. 23.20 as on June 30, 2023.

SSSTEEL

The Board of Directors has recommended 2% Cash dividend to general shareholders other than sponsors and directors for the year ended June 30, 2023. The Sponsors/Directors hold 104,473,775 shares out of total 328,633,200 shares of the company and General Shareholders hold 224,159,425 shares. Cash dividend payable to the General Shareholders is Tk. 44,831,884.91. Date of AGM: 31.12.2023, Time: 2:00 PM, Venue: Digital Platform. Record Date: 05.12.2023. The Company has reported consolidated EPS of Tk. 0.05, consolidated NAV per share (with revaluation) of Tk. 23.99, consolidated NAV per share (without revaluation) of Tk. 21.50 and consolidated NOCFPS of Tk. (2.46) for the year ended June 30, 2023 as against Tk. 1.87, Tk. 24.05, Tk. 21.41 and Tk. (4.04) respectively for the year ended June 30, 2022.

ARAMIT

The Board of Directors recommended 25% Cash dividend for the year ended June 30, 2023. Date of AGM: 30.12.2023, Time: 10:30 AM, Venue: Digital Platform. Record date: 06.12.2023. The Company has also reported EPS of Tk. 4.01, NAV per share of Tk. 144.99 and NOCFPS of Tk. 5.69 for the year ended June 30, 2023 as against Tk. 8.25, Tk. 152.28 and Tk. 5.11 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. (0.39) for July-September, 2023 as against Tk. 1.13 for July-September, 2022. NOCFPS was Tk. (8.26) for July-September, 2023 as against Tk. (0.89) for July-September, 2022. NAV per share was Tk. 142.56 as on September 30, 2023 and Tk. 144.99 as on June 30, 2023.

FEKDIL

(Q1 Un-audited): EPS was Tk. (0.17) for July-September 2023 as against Tk. (0.08) for July-September 2022; NOCFPS was Tk. 3.51 for July-September 2023 as against Tk. 2.45 for July-September 2022. NAV per share was Tk. 19.36 as on September 30, 2023 and Tk. 19.53 as on June 30, 2023.

GHCL

The Board of Directors has recommended No Dividend for the year ended June 30, 2023. Date of AGM: 21.12.2023, Time: 10:30 AM, Venue: Digital Platform. Record Date: 06.12.2023. The Company has also reported EPS of Tk. (5.77), NAV per share of Tk. 47.85 and NOCFPS of Tk. (2.45) for the year ended June 30, 2023 as against Tk. (1.57), Tk. 53.68 and Tk. (0.50) respectively for the year ended June 30, 2022.

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