

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.23%) lost 14.42 points and closed at 6,226.56. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.20%), and the large-cap index CDSET (-0.06%) closed at 2,105.82, 1,351.05, and 1,207.29 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.32% followed by Pharmaceutical (-0.10%), Engineering (-0.08%), Fuel & Power (-0.08%), NBFI (-0.03%), Telecommunication (0.00%), and Bank (+0.03%), respectively. Block trades contributed 6.5% of the overall market turnover. C & A Textiles Limited (0.0%) was the most traded share with a turnover of BDT 508 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,226.56	6,240.98	-14.42	-0.23%	+0.3%
DS30	2,105.82	2,110.64	-4.82	-0.23%	-4.1%
DSES	1,351.05	1,353.76	-2.71	-0.20%	-0.6%
CDSET	1,207.29	1,207.96	-0.67	-0.06%	-0.6%

	Advanced	Declined	Unchanged	Total
All Category	19	124	151	294
A Category (Equity)	11	77	101	189
B Category (Equity)	6	40	40	86
N Category (Equity)	0	1	0	1
Z Category (Equity)	2	6	10	18
Mutual Funds	0	4	14	18
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,721,419	7,743,966	-0.3%
	Mn USD	69,562	69,765	
Turnover	Mn BDT	4,429	4,339	+2.1%
	Mn USD	40	39	
Volume	Mn Shares	173	142	+21.1%
No. of Trade		125,447	132,013	-5.0%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 20, 2023

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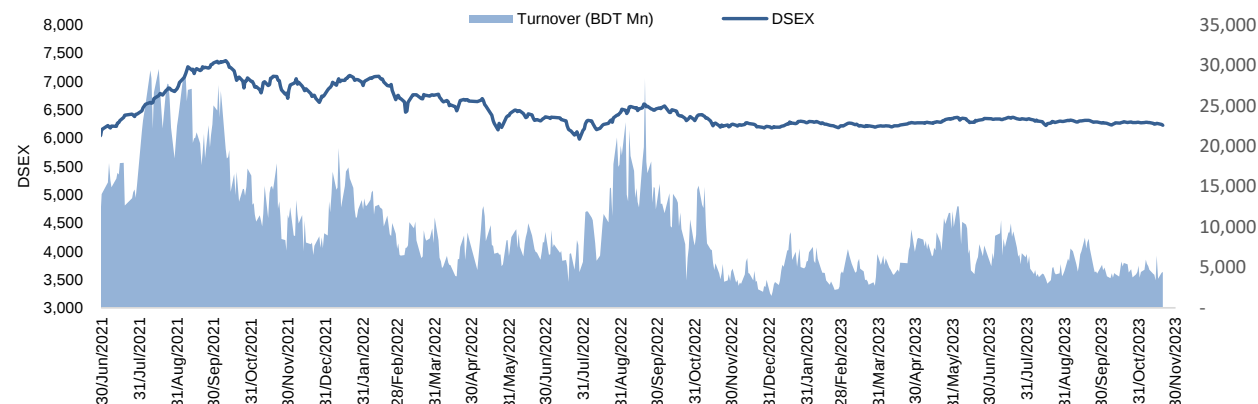


Figure: Sectorial Turnover (BDT Mn)

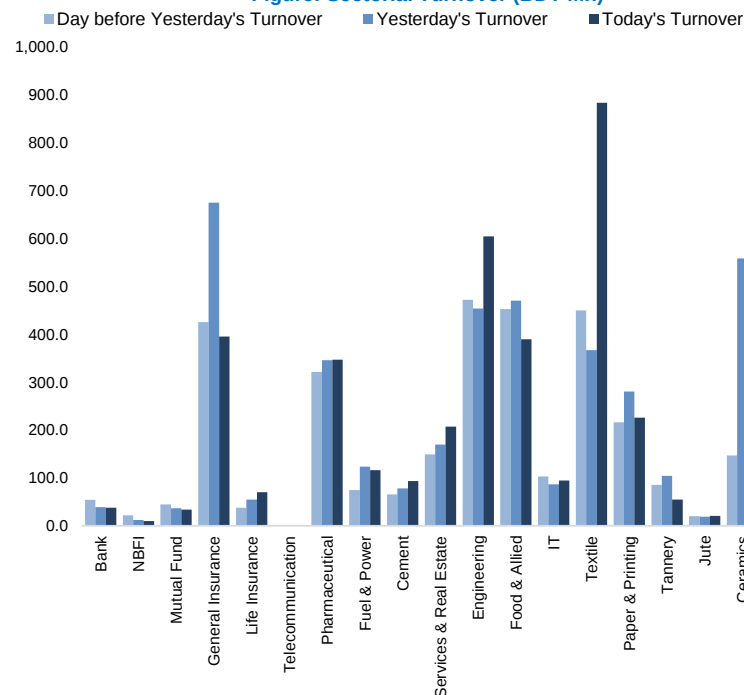
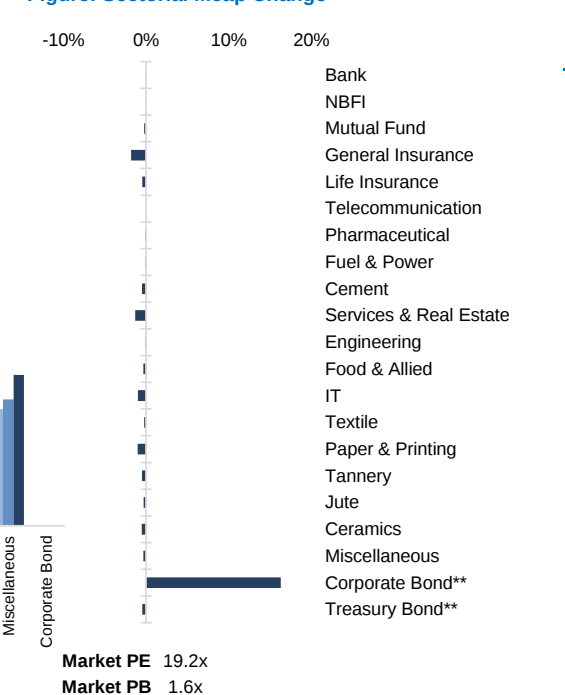


Figure: Sectorial Mcap Change



Market PE 19.2x

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	1,445	+0.42	+0.03%	35	681,761	8.8%	37.7	0.9%	12.4x	0.7x	GP	386,996	8.6%	1.0	12.5x	6.4x
NBFI	1,917	1,918	-0.50	-0.03%	23	186,589	2.4%	10.0	0.2%	NM	815.9x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	828	830	-1.87	-0.23%	37	39,180	0.5%	33.8	0.8%	NM	0.7x	BATBC	280,098	6.2%	0.2	15.4x	5.7x
General Insurance	3,528	3,592	-64.33	-1.79%	42	103,077	1.3%	395.6	9.6%	19.1x	1.6x	SQURPHARMA	185,977	4.1%	1.3	9.5x	1.5x
Life Insurance	2,571	2,582	-11.25	-0.44%	15	71,855	0.9%	69.8	1.7%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	1.0	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,704	3,708	-3.77	-0.10%	33	716,014	9.3%	347.1	8.4%	19.4x	2.2x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,697	1,699	-1.34	-0.08%	23	447,715	5.8%	116.1	2.8%	38.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,503	2,515	-12.13	-0.48%	7	120,203	1.6%	93.4	2.3%	17.1x	2.6x	BERGERPBL	80,034	1.8%	7.8	25.9x	6.4x
Services & Real Estate	1,745	1,768	-23.17	-1.31%	8	68,944	0.9%	207.3	5.0%	22.7x	0.9x	LHBL	78,857	1.7%	41.9	12.4x	3.7x
Engineering	4,497	4,500	-3.60	-0.08%	42	528,098	6.9%	604.8	14.6%	27.7x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,174	21,242	-67.61	-0.32%	21	391,804	5.1%	389.8	9.4%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.2	13.8x	1.4x
IT	2,786	2,814	-27.67	-0.98%	11	36,323	0.5%	94.7	2.3%	28.7x	2.4x	BRACBANK	57,596	1.3%	0.0	7.7x	0.9x
Textile	1,660	1,663	-3.51	-0.21%	58	171,863	2.2%	883.9	21.3%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	9,895	9,997	-102.26	-1.02%	6	38,123	0.5%	225.7	5.5%	57.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.1	8.5x	0.7x
Tannery	3,100	3,115	-15.45	-0.50%	6	35,096	0.5%	55.0	1.3%	58.3x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,257	17,307	-50.00	-0.29%	3	4,221	0.1%	20.6	0.5%	NM	389.4x	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	695	699	-3.67	-0.53%	5	32,140	0.4%	239.1	5.8%	54.0x	1.9x	UNILEVERCL	38,757	0.9%	0.5	39.2x	18.7x
Miscellaneous	4,150	4,163	-13.37	-0.32%	14	225,952	2.9%	315.5	7.6%	25.9x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	1,815	1,561	+254.56	+16.31%	11	40,883	0.5%	0.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	-0.37	-0.43%	239	3,188,238	41.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mean	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OIMEX	23.1	+9.0%	64.5	NM	7.9x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	CNATEX	10.2	-	508.5	34.0x	NM
FINEFOODS	125.0	+6.4%	46.4	NM	11.8x	BATBC	74,086	4.3%	15.4x	5.7x	FUWANGCER	21.5	-	191.5	82.7x	1.8x
PDL	12.7	+4.1%	129.2	NM	0.9x	BEXIMCO	69,196	4.0%	34.2x	1.2x	YPL	28.4	-2.1%	179.8	NM	5.3x
HEIDELBCEM	248.8	+3.3%	33.6	27.4x	3.7x	RENATA	68,042	3.9%	66.1x	4.4x	EMERALDOIL	98.4	-9.2%	177.1	49.7x	NM
PREMIERCEM	53.9	+2.7%	10.9	NM	0.9x	BXPBARMA	45,564	2.6%	13.8x	1.4x	CENTRALPHL	16.3	-2.4%	173.0	NM	2.9x
INTRACO	34.2	+2.1%	23.8	31.1x	2.7x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	SEAPEARL	179.9	-2.7%	156.9	29.2x	9.8x
DAFODILCOM	81.2	+2.0%	1.6	NM	6x	GP	38,700	2.2%	12.5x	6.4x	KPPL	20.1	-9.0%	149.0	NM	NM
AZIZPIPES	104.4	+1.8%	11.6	NM	NM	BRACBANK	30,964	1.8%	7.7x	0.9x	KBPPWBIL	67.4	-2.2%	143.0	NM	5.7x
SHYAMPSUG	219.0	+1.7%	37.0	NM	NM	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	PDL	12.7	+4.1%	129.2	NM	0.9x
DACCADYE	15.0	+1.4%	40.3	NM	0.4x	LHBL	28,562	1.6%	12.4x	3.7x	OAL	13.2	-1.5%	98.5	NM	1.2x
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)
EMERALDOIL	98.4	-9.2%	177.1	49.7x	NM	NBL	19,116	1.1%	NM	0.9x	SQURPHARMA	214.1	199.9	52.0	207	41.86
KPPL	20.1	-9.0%	149.0	NM	NM	CITYBANK	18,190	1.0%	5.2x	0.7x	ASIAPACINS	48.7	48.7	1.0	851	41.44
AMBEEPBA	772.0	-7.1%	15.4	NM	74.7x	OLYMPIC	16,066	0.9%	17.6x	2.7x	SEAPPEARL	178.0	170.0	6.0	173	29.86
GEMINISEA	514.8	-6.9%	48.9	45.8x	19.7x	ROBI	15,714	0.9%	52.6x	2.4x	EMERALDOIL	119.0	107.0	5.0	220	26.10
DESHBANDHU	35.5	-6.3%	56.0	59.2x	1.8x	ALARABANK	14,357	0.8%	12.5x	1.1x	MERCANBANK	12.0	12.0	3.0	1,550	18.60
SIMTEX	20.2	-6.0%	16.6	25.6x	0.9x	BSRMLTD	14,210	0.8%	5.2x	0.6x	SONALIPAPR	615.2	569.0	3.0	24	14.67
LIBRAINFU	1,135.9	-5.9%	30.2	NM	0.9x	SEAPPEARL	13,733	0.8%	29.2x	9.8x	ADNTEL	98.0	98.0	3.0	84	8.23
REPUBLIC	43.0	-5.7%	24.9	21.5x	2.4x	UPGDCL	13,547	0.8%	16.9x	4.4x	ACMEPL	35.4	31.9	5.0	240	8.10
MEGHNACEM	68.5	-5.6%	4.2	NM	1.4x	PRIMEBANK	13,491	0.8%	5.1x	0.7x	EASTERNINS	74.0	74.0	1.0	100	7.40
HWAWELLTEX	52.2	-5.3%	2.6	9.1x	1.3x						INDEXAGRO	103.0	103.0	3.0	67	6.95

* NBFJ 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

* 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
SQURPHARMA	214.1	199.9	41.9	207	52
ASIAPACINS	48.7	48.7	41.4	851	1
SEAPEARL	178.0	170.0	29.9	173	6
EMERALDOIL	119.0	107.0	26.1	220	5
MERCANBANK	12.0	12.0	18.6	1,550	3
SONALIPAPR	615.2	569.0	14.7	24	3
ADNTEL	98.0	98.0	8.2	84	3
ACMEPL	35.4	31.9	8.1	240	5
EASTERNINS	74.0	74.0	7.4	100	1
INDEXAGRO	103.0	103.0	6.9	67	3
BXPBARMA	131.6	131.6	6.6	50	3
HRTEX	116.0	110.0	6.2	54	3
ACMELAB	82.5	80.2	5.9	72	10
LHBL	75.0	75.0	5.8	77	1
ACFL	24.1	23.9	4.9	205	6
FEKDIL	17.0	15.5	4.8	298	3
CRYSTALINS	96.0	95.5	4.6	48	2
NBL	8.1	8.1	3.2	400	4
CNATEX	11.2	9.4	3.0	300	3
IPDC	57.0	57.0	2.9	51	1
GSPFINANCE	27.4	27.4	2.7	99	1
PARAMOUNT	64.0	64.0	2.7	42	1
Total			287.2		152

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PTL		0.0%	10%	Record Date	21-Nov-23
RENWICKJA		0.0%	0%	Record Date	21-Nov-23
SHYAMPSUG		0.0%	0%	Record Date	21-Nov-23
PDL		0.0%	1%	Record Date	21-Nov-23
SAVAREFR		0.0%	0%	Record Date	21-Nov-23
SAIHAMCOT		0.0%	0%	Record Date	21-Nov-23
DULAMACOT		0.0%	0%	Record Date	21-Nov-23
BENGALWTL		0.0%	5%	Record Date	21-Nov-23
GHAIL		0.0%	1%	Record Date	21-Nov-23
BPML		0.0%	11%	Record Date	21-Nov-23
ZEALBANGLA		0.0%	0%	Record Date	21-Nov-23
BATASHOE		0.0%	330%	Record Date	21-Nov-23
METROSPIN		0.0%	0%	Record Date	22-Nov-23
ACMELAB		0.0%	33%	Record Date	22-Nov-23
NFML		0.0%	0%	Record Date	22-Nov-23
SALVOCHEM		0.0%	5%	Record Date	22-Nov-23
JMISMDL		0.0%	10%	Record Date	22-Nov-23

Important DSE News

CNATEX

The Board of Directors has recommended 0.50% Cash Dividend (Tk. 0.05 per share) for each ordinary share only for general shareholders other than Sponsors/Directors for the year ended June 30, 2023. Date of AGM: 28.12.2023, Time: 5:00 PM, Venue: Digital Platform. Record Date: 06.12.2023. The Company has also reported EPS of Tk. 0.19, NAV per share of Tk. (3.81) and NOCFPS of Tk. 0.03 for the year ended June 30, 2023 as against Tk. 0.10, Tk. (3.61) and Tk. 0.04 respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. 0.08 for July-September 2023 as against Tk. (0.03) for July-September 2022. NOCFPS was Tk. 0.04 for July-September 2023 as against Tk. 0.008 for July-September 2022. NAV per share was Tk. (3.73) as on September 30, 2023 and Tk. (3.81) as on June 30, 2023.

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