

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 2.74 points and closed at 6,224.47. The blue-chip index DS30 (-0.06%), the Shariah-based index DSES (+0.04%), and the large-cap index CDSET (-0.09%) closed at 2,103.20, 1,350.60, and 1,205.73 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.08% followed by Engineering (+0.06%), Food & Allied (+0.03%), Fuel & Power (+0.03%), NBF (0.01%), and Bank (-0.11%), respectively. Block trades contributed 8.1% of the overall market turnover. Fu-Wang Ceramic Industries Ltd. (-4.3%) was the most traded share with a turnover of BDT 226 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,224.47	6,221.73	+2.74	+0.04%	+0.3%
DS30	2,103.20	2,104.41	-1.21	-0.06%	-4.2%
DSES	1,350.60	1,350.02	+0.58	+0.04%	-0.6%
CDSET	1,205.73	1,206.82	-1.09	-0.09%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	100	33	186	319
A Category (Equity)	59	21	124	204
B Category (Equity)	35	9	51	95
N Category (Equity)	0	1	0	1
Z Category (Equity)	6	2	11	19
Mutual Funds	2	0	20	22
Corporate Bonds	0	0	0	0
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,719,723	7,716,893	+0.0%
	Mn USD	69,547	69,522	
Turnover	Mn BDT	4,096	3,454	+18.6%
	Mn USD	37	31	
Volume	Mn Shares	146	117	+24.5%
No. of Trade		121,617	105,736	+15.0%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 22, 2023

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Billal Hossain

Research Associate

(880) 1708805229

billal.hossain@bracepl.com

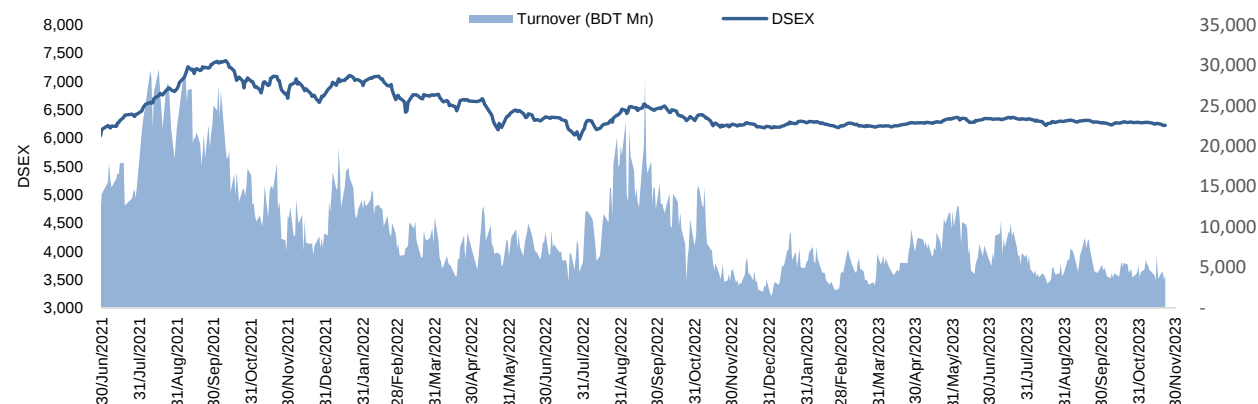


Figure: Sectorial Turnover (BDT Mn)

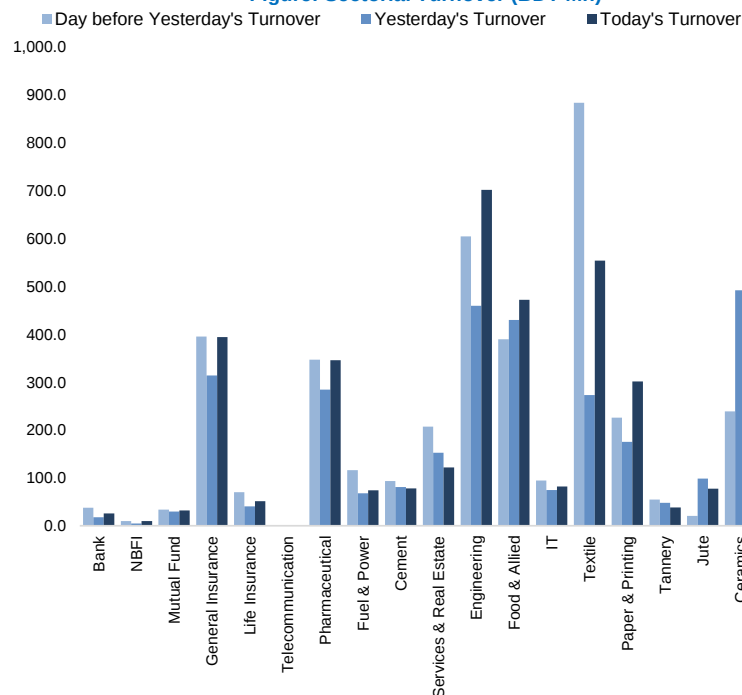
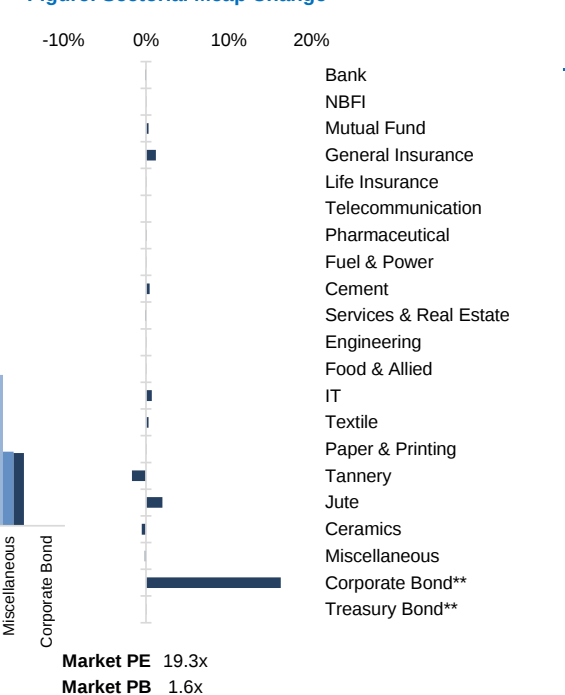


Figure: Sectorial Mcap Change



Market PE 19.3x

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	1,443	1,445	-1.65	-0.11%	35	680,685	8.8%	26.0	0.7%	12.4x	0.7x	GP	386,996	8.6%	0.8	12.5x	6.4x
NBFI	1,917	1,917	+0.18	+0.01%	23	186,589	2.4%	10.0	0.3%	NM	815.9x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	831	828	+2.59	+0.31%	37	39,287	0.5%	31.9	0.8%	NM	0.8x	BATBC	280,098	6.2%	0.2	15.4x	5.7x
General Insurance	3,503	3,462	+41.43	+1.20%	42	102,362	1.3%	394.5	10.5%	19.0x	1.6x	SQURPHARMA	185,977	4.1%	0.8	9.5x	1.5x
Life Insurance	2,564	2,564	+0.39	+0.02%	15	71,668	0.9%	51.6	1.4%	NM	NM	ROBI	157,138	3.5%	0.2	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%	0.1	66.1x	4.4x
Pharmaceutical	3,706	3,703	+3.08	+0.08%	33	716,372	9.3%	345.7	9.2%	19.4x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,697	1,697	+0.50	+0.03%	23	447,699	5.8%	74.4	2.0%	42.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,498	2,487	+10.74	+0.43%	7	119,974	1.6%	77.9	2.1%	17.1x	2.6x	BERGERPBL	79,789	1.8%	2.5	25.8x	6.3x
Services & Real Estate	1,737	1,739	-2.12	-0.12%	8	68,636	0.9%	122.1	3.2%	22.6x	0.9x	LHBL	78,741	1.7%	18.5	12.4x	3.7x
Engineering	4,501	4,498	+2.64	+0.06%	42	528,575	6.9%	702.0	18.7%	27.7x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,187	21,180	+7.12	+0.03%	21	392,042	5.1%	472.4	12.6%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,755	2,736	+18.93	+0.69%	11	35,916	0.5%	82.3	2.2%	28.4x	2.4x	BRACBANK	57,596	1.3%	0.0	7.7x	0.9x
Textile	1,664	1,660	+4.88	+0.29%	58	172,367	2.2%	554.1	14.7%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	9,937	9,934	+2.65	+0.03%	6	38,286	0.5%	301.4	8.0%	57.9x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,045	3,098	-52.66	-1.70%	6	34,478	0.4%	38.1	1.0%	56.9x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	18,816	18,450	+365.61	+1.98%	3	4,603	0.1%	77.3	2.1%	NM	128.8x	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	696	699	-3.52	-0.50%	5	32,169	0.4%	248.7	6.6%	54.0x	1.9x	UNILEVERCL	38,738	0.9%	1.3	39.2x	18.7x
Miscellaneous	4,138	4,144	-6.41	-0.15%	14	225,296	2.9%	152.1	4.0%	25.8x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	2,456	2,111	+344.39	+16.31%	11	40,885	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.02	+0.03%	239	3,187,655	41.4%	0.1	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
IMAMBUTTON	213.8	+9.8%	15.6	NM	78.0x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	FUWANGCER	22.1	-4.3%	225.8	85.0x	1.9x
KPPL	24.1	+9.0%	209.2	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	CENTRALPHL	17.0	-5.0%	223.8	NM	3.1x
CRYSTALINS	93.5	+9.0%	48.5	30.6x	3.7x	BEXIMCO	69,196	4.0%	34.2x	1.2x	YPL	30.8	+4.8%	210.9	NM	5.8x
GEMINISEA	534.4	+8.8%	64.1	47.5x	20.5x	RENATA	68,042	3.9%	66.1x	4.4x	KPPL	24.1	+9.0%	209.2	NM	NM
PDL	13.8	+8.7%	198.2	NM	1.0x	BXPBARMA	45,564	2.6%	13.8x	1.4x	PDL	13.8	+8.7%	198.2	NM	1.0x
AZIZPIPES	119.0	+7.2%	74.4	NM	NM	BEACONPHAR	39,617	2.3%	86.9x	9.0x	ETL	12.2	+7.0%	144.1	26.5x	1.0x
ETL	12.2	+7.0%	144.1	26.5x	1x	GP	38,700	2.2%	12.5x	6.4x	FUWANGFOOI	31.0	+0.3%	139.1	NM	11.9x
LIBRAINFU	1,176.8	+6.2%	18.1	NM	0.9x	BRACBANK	30,964	1.8%	7.7x	0.9x	OAL	13.2	-1.5%	104.3	NM	1.2x
CAPITECGBF	12.2	+6.1%	26.6	NM	1.2x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	BDTHAI	19.2	-3.5%	89.6	NM	0.7x
AMBEEPHA	789.5	+5.9%	9.5	NM	76.4x	LHBL	28,562	1.6%	12.4x	3.7x	EMERALDOIL	100.7	+1.3%	80.8	50.9x	NM

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)
KBPPWBIL	62.4	-5.6%	78.3	NM	5.3x	SQURPHARMA	202.0	200.1	27.0	257	51.77
CENTRALPHL	17.0	-5.0%	223.8	NM	3x	SEAPPEARL	183.0	172.0	4.0	229	40.45
BATASHOE	928.4	-4.9%	0.6	22.8x	3.4x	BEXIMCO	114.8	104.1	7.0	251	27.87
FUWANGCER	22.1	-4.3%	225.8	85.0x	1.9x	FINEFOODS	126.0	113.5	2.0	240	27.69
BDTHAI	19.2	-3.5%	89.6	NM	0.7x	ACMEPL	34.4	31.9	7.0	818	27.10
PUBALIBANK	26.0	-3.0%	0.7	4.1x	0.6x	EMERALDOIL	100.0	90.5	5.0	266	25.93
HEIDELBCEM	241.9	-2.9%	24.0	26.6x	3.6x	CNATEX	11.0	9.3	15.0	1,277	12.08
SHURWID	14.2	-2.7%	5.1	NM	1.1x	HRTEX	120.1	113.9	3.0	94	11.08
OIMEX	22.9	-2.6%	58.8	NM	7.8x	RUPALILIFE	113.5	93.0	2.0	93	9.46
BPML	59.0	-1.8%	10.9	25.1x	0.8x	ASIAPACINS	59.4	51.0	2.0	150	8.49

* 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	202.0	200.1	51.8	257	27
SEAPPEARL	183.0	172.0	40.5	229	4
BEXIMCO	114.8	104.1	27.9	251	7
FINEFOODS	126.0	113.5	27.7	240	2
ACMEPL	34.4	31.9	27.1	818	7
EMERALDOIL	100.0	90.5	25.9	266	5
CNATEX	11.0	9.3	12.1	1,277	15
HRTEX	120.1	113.9	11.1	94	3
RUPALILIFE	113.5	93.0	9.5	93	2
ASIAPACINS	59.4	51.0	8.5	150	2
GP	286.6	261.6	7.7	29	3
MONNOCERA	110.0	110.0	7.0	64	1
APEXTANRY	99.2	99.2	6.3	64	2
SIBL	12.0	11.3	6.0	515	2
RAHIMAFood	230.1	220.1	5.6	25	2
PRAGATIINS	60.0	60.0	3.9	65	1
PTL	77.0	69.4	3.7	50	6
SAIHAMTEX	15.9	15.9	3.5	220	6
ACFL	24.1	24.1	2.9	121	4
FIRSTSBANK	8.7	8.7	2.9	336	2
GREENDELMF	6.6	6.6	2.9	440	1
LHBL	74.1	74.1	2.5	34	1
Total			332.2		150

Important DSE News

SAMATALETH

(Q3 Un-audited): EPS was Tk. 0.01 for January-March 2023 as against Tk. 0.01 for January-March 2022; EPS was Tk. (0.04) for July 2022-March 2023 as against Tk. (0.03) for July 2021-March 2022. NOCFPS was Tk. 0.02 for July 2022-March 2023 as against Tk. 0.41 for July 2021-March 2022. NAV per share was Tk. 14.22 as on March 31, 2023 and Tk. 14.30 as on June 30, 2022.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DESCO		0.0%	10%	Record Date	23-Nov-23
OAL		0.0%	0%	Record Date	23-Nov-23
TOSRIFA		0.0%	4%	Record Date	23-Nov-23
SIMTEX		0.0%	10%	Record Date	23-Nov-23
GPHISPAT		5.0%	5%	Record Date	23-Nov-23
FORTUNE		0.0%	5%	Record Date	23-Nov-23
SKTRIMS		0.0%	3%	Record Date	23-Nov-23
CVOPRL		0.0%	5%	Record Date	23-Nov-23
SAFKOSPINN		0.0%	0%	Record Date	23-Nov-23
AMBEEPFA		0.0%	15%	Record Date	23-Nov-23
HAKKANIPUL		0.0%	2%	Record Date	23-Nov-23
KOHINOOR		10.0%	40%	Record Date	23-Nov-23
ORIONINFU		0.0%	10%	Record Date	23-Nov-23
SAPORTL		0.0%	12%	Record Date	26-Nov-23
ACFL		0.0%	10%	Record Date	26-Nov-23
FASFIN		0.0%	0%	Record Date	26-Nov-23
BDTHAI		0.0%	0%	Record Date	26-Nov-23

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