

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.15%) gained 9.24 points and closed at 6,233.71. The blue-chip index DS30 (+0.17%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.10%) closed at 2,106.72, 1,352.54, and 1,206.97 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.15%, followed by Bank (+0.08%), NBF1 (+0.01%), Pharmaceutical (-0.00%), Fuel & Power (-0.02%), and Food & Allied (-0.07%), respectively. Block trades contributed 9.9% of the overall market turnover. Fu-Wang Ceramic Industries Ltd. (+0.5%) was the most traded share with a turnover of BDT 262 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,233.71	6,224.47	+9.24	+0.15%	+0.4%
DS30	2,106.72	2,103.20	+3.51	+0.17%	-4.0%
DSES	1,352.54	1,350.60	+1.94	+0.14%	-0.5%
CDSET	1,206.97	1,205.73	+1.24	+0.10%	-0.6%

	Advanced	Declined	Unchanged	Total
All Category	71	55	171	297
A Category (Equity)	33	42	118	193
B Category (Equity)	30	10	45	85
N Category (Equity)	0	1	0	1
Z Category (Equity)	8	2	8	18
Mutual Funds	1	1	15	17
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,724,916	7,719,723	+0.1%
	Mn USD	69,594	69,547	
Turnover	Mn BDT	3,704	4,096	-9.6%
	Mn USD	33	37	
Volume	Mn Shares	111	146	-23.6%
No. of Trade		111,696	121,617	-8.2%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 23, 2023

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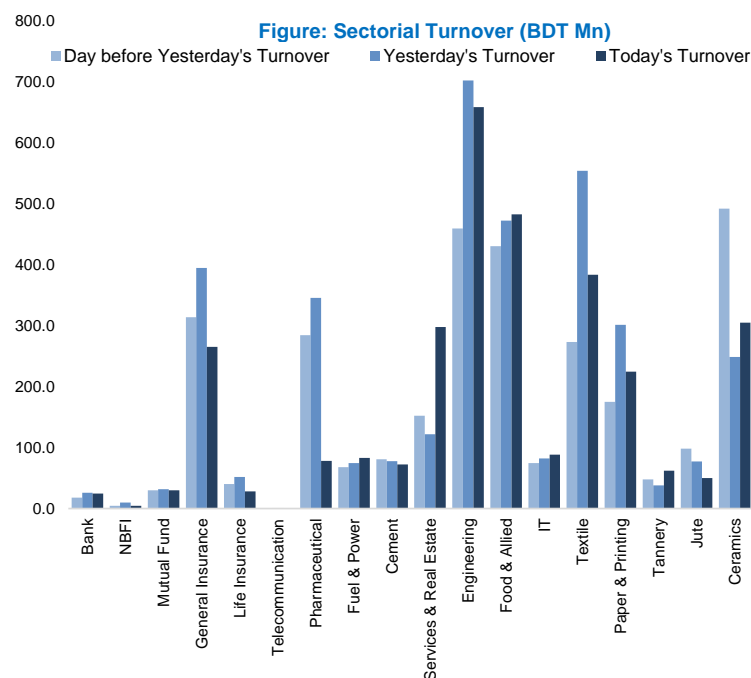
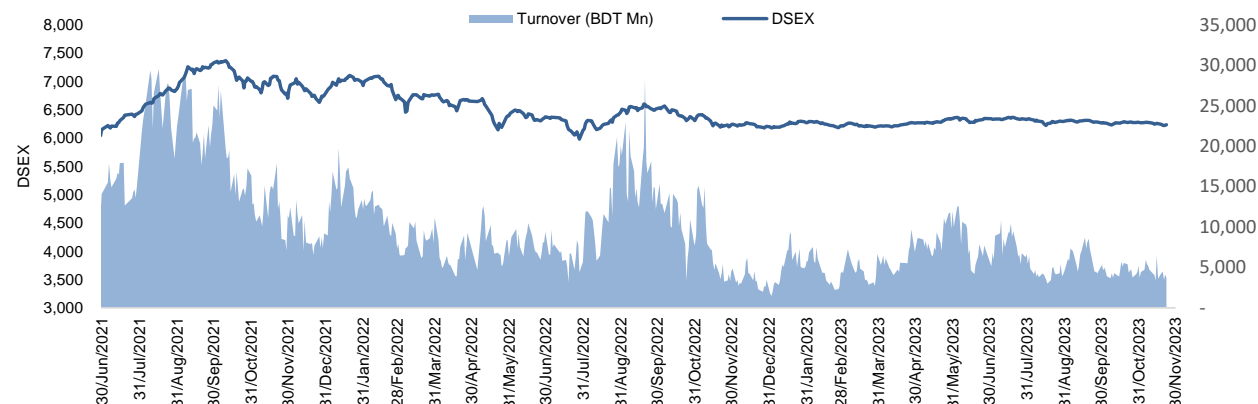
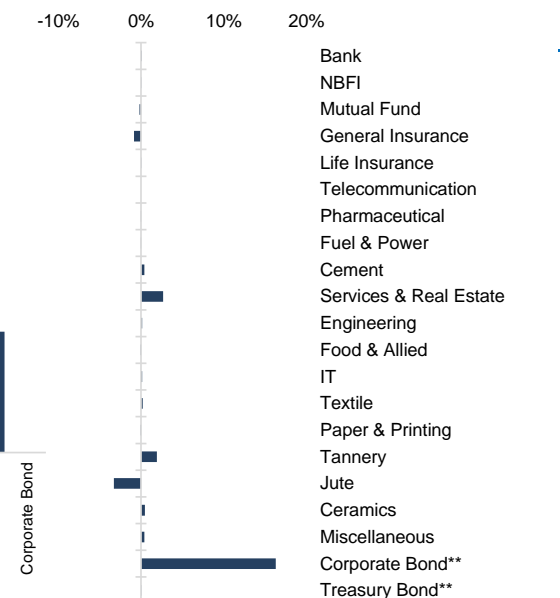


Figure: Sectorial Turnover (BDT Mn)

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	1,444	1,443	+1.15	+0.08%	35	681,228	8.8%	24.4	0.7%	12.4x	0.7x	GP	386,996	8.6%	0.1	12.5x	6.4x
NBFI	1,918	1,917	+0.15	+0.01%	23	186,604	2.4%	4.7	0.1%	NM	816.0x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	829	831	-1.60	-0.19%	37	39,211	0.5%	29.8	0.9%	NM	0.7x	BATBC	280,098	6.2%	0.2	15.4x	5.7x
General Insurance	3,473	3,503	-29.88	-0.85%	42	101,489	1.3%	265.1	7.9%	18.8x	1.6x	SQURPHARMA	185,977	4.1%	0.7	9.5x	1.5x
Life Insurance	2,565	2,564	+0.73	+0.03%	15	71,689	0.9%	28.1	0.8%	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	3,706	3,706	-0.14	-0.00%	33	716,346	9.3%	78.0	2.3%	19.5x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,697	1,697	-0.26	-0.02%	23	447,630	5.8%	83.0	2.5%	42.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,508	2,498	+9.81	+0.39%	7	120,446	1.6%	72.5	2.2%	17.1x	2.6x	BERGERPBL	79,742	1.8%	0.9	25.8x	6.3x
Services & Real Estate	1,784	1,737	+46.83	+2.70%	8	70,486	0.9%	297.6	8.9%	23.2x	0.9x	LHBL	78,973	1.8%	18.4	12.4x	3.7x
Engineering	4,507	4,501	+6.55	+0.15%	42	529,344	6.9%	658.5	19.7%	27.7x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,173	21,187	-13.90	-0.07%	21	391,785	5.1%	482.5	14.5%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,759	2,755	+3.75	+0.14%	11	35,965	0.5%	88.2	2.6%	28.4x	2.4x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,668	1,664	+3.69	+0.22%	58	172,750	2.2%	383.5	11.5%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	9,933	9,937	-3.63	-0.04%	6	38,272	0.5%	224.6	6.7%	57.8x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,104	3,045	+58.69	+1.93%	6	35,143	0.5%	62.1	1.9%	58.0x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	18,197	18,816	-618.81	-3.29%	3	4,452	0.1%	50.2	1.5%	NM	124.6x	TITASGAS	40,459	0.9%	0.3	NM	0.6x
Ceramics	699	696	+3.23	+0.46%	5	32,319	0.4%	305.1	9.1%	54.3x	1.9x	UNILEVERCL	38,738	0.9%	1.0	39.2x	18.7x
Miscellaneous	4,155	4,138	+16.86	+0.41%	14	226,214	2.9%	198.3	5.9%	25.9x	1.8x	POWERGRID	37,347	0.8%	0.4	NM	0.3x
Corporate Bond**	2,856	2,456	+400.44	+16.31%	11	40,883	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.02	+0.03%	239	3,188,458	41.3%	0.0	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
GQBALLPEN	130.4	+9.9%	35.8	NM	1.1x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	FUWANGCER	22.2	+0.5%	262.1	85.4x	1.9x
NFML	16.7	+9.9%	31.2	NM	1.4x	BATBC	74,086	4.3%	15.4x	5.7x	YPL	32.9	+6.8%	257.4	NM	6.1x
MEGHNA PET	41.4	+9.8%	16.3	NM	NM	BEXIMCO	69,196	4.0%	34.2x	1.2x	SEAPPEARL	189.8	+7.9%	228.5	30.8x	10.3x
MIRACLEIND	42.6	+9.8%	63.1	NM	2.6x	RENATA	68,042	3.9%	66.1x	4.4x	KPPL	25.3	+5.0%	168.7	NM	NM
RSRMSTEEL	18.6	+9.4%	12.3	NM	0.4x	BXPBARMA	45,564	2.6%	13.8x	1.4x	PDL	14.8	+7.2%	145.5	NM	1.1x
KBPPWBIL	68.0	+9.0%	56.9	NM	5.7x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	FUWANGFOOT	30.6	-1.3%	143.0	NM	11.7x
SEAPPEARL	189.8	+7.9%	228.5	30.8x	10x	GP	38,700	2.2%	12.5x	6.4x	BDTHAI	20.1	+4.7%	132.3	NM	0.7x
PDL	14.8	+7.2%	145.5	NM	1.1x	BRACBANK	30,964	1.8%	7.7x	0.9x	EMERALDOIL	97.5	-3.2%	94.6	49.2x	NM
YPL	32.9	+6.8%	257.4	NM	6.1x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	WMSHIPYARD	13.1	+4.8%	92.8	NM	0.7x
DACCADYE	17.0	+5.6%	56.1	NM	0.5x	LHBL	28,562	1.6%	12.4x	3.7x	ETL	12.6	+3.3%	85.1	27.4x	1.0x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CAPITECGBF	11.7	-4.1%	24.7	NM	1.2x	NBL	19,116	1.1%	NM	0.9x	SEAPPEARL	179.0	158.8	11.0	943	153.83
SONALIANSH	634.3	-4.1%	49.4	84.0x	5x	CITYBANK	18,190	1.0%	5.2x	0.7x	SQURPHARMA	203.7	200.1	25.0	176	35.77
IMAMBUTTON	205.5	-3.9%	11.0	NM	75.0x	OLYMPIC	16,066	0.9%	17.2x	2.7x	CNATEX	10.6	9.2	39.0	3,290	30.43
UNIONINS	60.1	-3.5%	32.1	21.5x	3.1x	ROBI	15,714	0.9%	52.6x	2.4x	HRTEX	120.1	115.8	6.0	162	19.13
AZIZPIPES	115.0	-3.4%	51.5	NM	NM	ALARABANK	14,357	0.8%	12.5x	1.1x	EMERALDOIL	110.7	110.7	2.0	159	17.60
EMERALDOIL	97.5	-3.2%	94.6	49.2x	NM	BSRMLTD	14,210	0.8%	5.2x	0.6x	FINEFOODS	126.0	113.5	2.0	94	10.93
UNITEDINS	44.7	-2.8%	3.2	24.6x	1.4x	SEAPPEARL	13,733	0.8%	30.8x	10.3x	GENEXIL	64.1	64.0	2.0	131	8.36
EASTERNINS	66.6	-2.5%	12.5	23.7x	1.3x	UPGDCL	13,547	0.8%	19.6x	4.1x	DELTALIFE	133.8	126.0	3.0	60	7.96
ICICL	30.8	-2.2%	6.9	27.8x	1.8x	PRIMEBANK	13,491	0.8%	5.0x	0.7x	KDSALTD	84.0	77.0	4.0	94	7.41
RELIANCINS	68.1	-1.9%	7.5	12.0x	1.0x						AL-HAJTEX	133.9	133.8	2.0	49	6.60

* 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
SEAPEARL	179.0	158.8	153.8	943	11
SQRPHARMA	203.7	200.1	35.8	176	25
CNATEX	10.6	9.2	30.4	3,290	39
HRTEX	120.1	115.8	19.1	162	6
EMERALDOIL	110.7	110.7	17.6	159	2
FINEFOODS	126.0	113.5	10.9	94	2
GENEXIL	64.1	64.0	8.4	131	2
DELTALIFE	133.8	126.0	8.0	60	3
KDSALTD	84.0	77.0	7.4	94	4
AL-HAJTEX	133.9	133.8	6.6	49	2
BEACHHATCH	52.0	52.0	5.7	111	2
PTL	70.1	70.1	5.6	80	1
ACMEPL	35.0	31.9	4.2	130	4
RUPALILIFE	113.0	113.0	4.1	36	1
EASTERNINS	75.0	75.0	3.8	50	1
ROBI	27.0	27.0	3.6	133	3
SUNLIFEINS	47.7	47.7	3.1	65	4
MARICO	2,401.0	2,400.0	3.0	1	2
BBSCABLES	49.9	49.9	2.8	55	1
SONALIPAPR	599.9	599.9	2.7	4	1
CONFIDCEM	89.0	81.0	2.4	28	2
BPPL	29.2	29.2	2.3	79	1
Total			367.3		159

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GOLDENSON		0.0%	1%	Record Date	26-Nov-23
JHRML		0.0%	5%	Record Date	26-Nov-23
SONARGAON		0.0%	0%	Record Date	27-Nov-23
PADMAOIL		0.0%	135%	Record Date	28-Nov-23
BDSERVICE		0.0%	0%	Record Date	28-Nov-23
EMERALDOIL		0.0%	10%	Record Date	29-Nov-23
NLTUBES		0.0%	0%	Record Date	29-Nov-23
ICB		2.5%	3%	Record Date	29-Nov-23
HFL		0.0%	5%	Record Date	30-Nov-23
SINOBANGLA		0.0%	10%	Record Date	30-Nov-23
SEAPEARL		0.0%	17%	Record Date	30-Nov-23
GBBPOWER		0.0%	2%	Record Date	30-Nov-23
AIL		0.0%	17%	Record Date	30-Nov-23

Important DSE News

GHCL

(Q1 Un-audited): EPS was Tk. (1.99) for July-September 2023 as against Tk. (0.46) for July-September 2022; NOCFPS was Tk. 0.61 for July-September 2023 as against Tk. 0.07 for July-September 2022. NAV per share was Tk. 45.86 as on September 30, 2023 and Tk. 47.85 as on June 30, 2023.

NCCBANK

Mr. Nisar Kader, one of the Sponsors of the company, has further informed that he has completed his sale of 3,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 08.11.2023.

SOUTHEASTB

Mrs. Rehana Kashem, one of the Sponsors of the company, has further informed that she has completed her sale of 20,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 22.10.2023.

ESQUIRENIT

The company has informed that the Board of Directors has elected Mrs. Piara Hossain as the Chairman of the Board of Directors of the company with effect from October 31, 2023.

APEXFOOT

Mr. Syed Manzur Elahi, one of the Sponsor Directors of the Company, has expressed his intention to buy 38,500 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Limited within next 30 working days.

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