

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.11%) lost 6.63 points and closed at 6,202.81. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (-0.05%) closed at 2,099.39, 1,346.61, and 1,205.51 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.02%, followed by Fuel & Power (+0.02%), Food & Allied (+0.01%), Telecommunication (+0.00%), NBFI (-0.02%), Bank (-0.03%), and Engineering (-0.13%), respectively. Block trades contributed 10.0% of the overall market turnover. Central Pharmaceuticals Limited (-5.5%) was the most traded share with a turnover of BDT 160 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,202.81	6,209.44	-6.63	-0.11%	-0.1%
DS30	2,099.39	2,101.37	-1.99	-0.09%	-4.4%
DSES	1,346.61	1,347.33	-0.72	-0.05%	-0.9%
CDSET	1,205.51	1,206.08	-0.57	-0.05%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	54	77	174	305
A Category (Equity)	34	38	122	194
B Category (Equity)	15	34	42	91
N Category (Equity)	1	0	0	1
Z Category (Equity)	4	5	10	19
Mutual Funds	1	2	12	15
Corporate Bonds	0	0	2	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,708,781	7,712,023	-0.0%
	Mn USD	69,763	69,792	
Turnover	Mn BDT	2,972	3,700	-19.7%
	Mn USD	27	33	
Volume	Mn Shares	106	132	-19.7%
	No. of Trade	95,718	123,883	

* Average Interbank Exchange Rate is BDT 110.50 as of Nov 28, 2023

Fahim Hassan
 Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Billal Hossain

Research Associate

(880) 1708805229

billal.hossain@bracepl.com

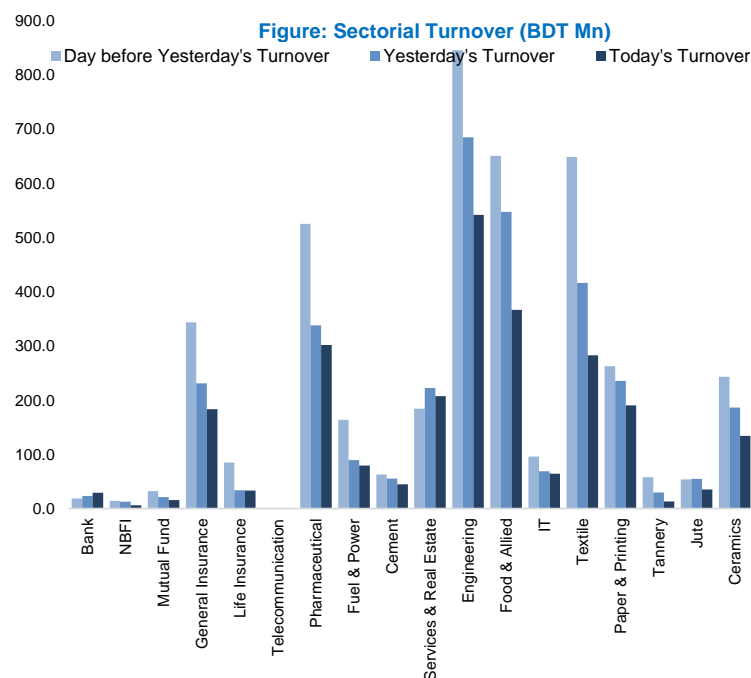
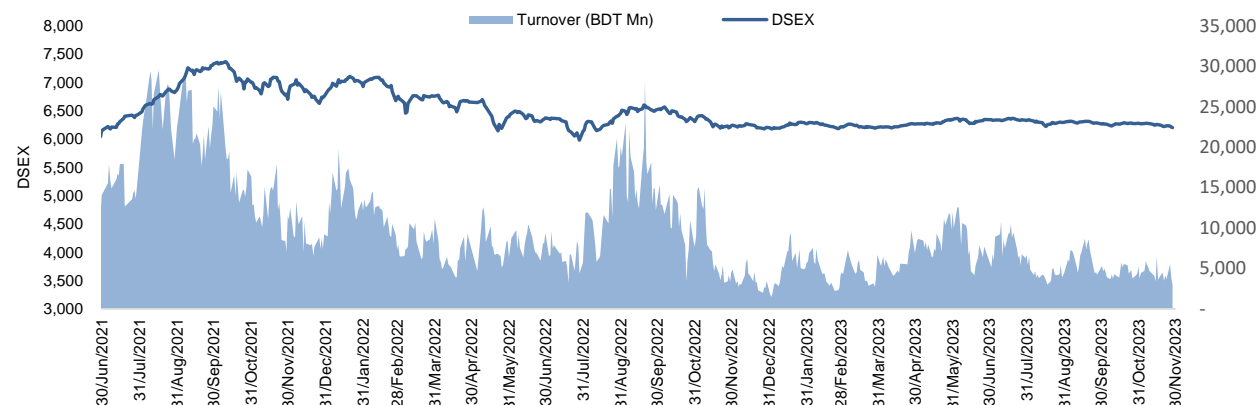
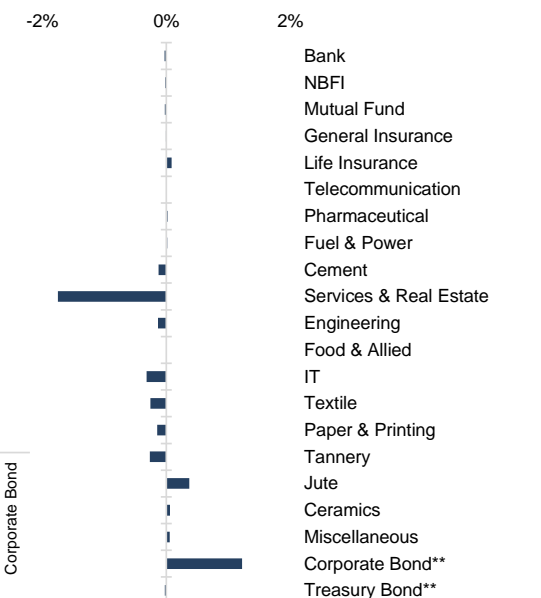


Figure: Sectorial Mcap Change



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	1,442	1,443	-0.38	-0.03%	35	680,461	8.8%	29.1	1.1%	12.4x	0.7x	GP	386,996	8.6%	0.1	12.5x	6.4x
NBFI	1,917	1,918	-0.35	-0.02%	23	186,572	2.4%	6.2	0.2%	NM	815.8x	WALTONHIL	317,378	7.1%	0.0	30.8x	4.2x
Mutual Fund	826	826	-0.20	-0.02%	37	39,076	0.5%	15.7	0.6%	NM	0.7x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,387	3,388	-0.13	-0.00%	42	98,982	1.3%	183.3	6.9%	18.4x	1.6x	SQURPHARMA	185,977	4.1%	0.5	9.5x	1.5x
Life Insurance	2,540	2,538	+2.14	+0.08%	15	70,992	0.9%	33.1	1.2%	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	3,696	3,696	+0.66	+0.02%	33	714,501	9.3%	301.6	11.3%	19.4x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,698	1,698	+0.28	+0.02%	23	447,844	5.8%	79.2	3.0%	42.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,479	2,482	-3.12	-0.13%	7	119,061	1.5%	44.5	1.7%	16.9x	2.6x	BERGERPBL	79,775	1.8%	8.0	25.8x	6.3x
Services & Real Estate	1,715	1,745	-30.54	-1.75%	8	67,751	0.9%	207.5	7.8%	22.3x	0.9x	LHBL	78,973	1.8%	27.1	12.4x	3.7x
Engineering	4,497	4,503	-5.98	-0.13%	42	528,102	6.9%	541.8	20.3%	26.7x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,092	21,091	+1.40	+0.01%	21	390,286	5.1%	366.7	13.7%	19.6x	6.8x	BXPHERMA	65,222	1.5%	0.0	13.8x	1.4x
IT	2,736	2,745	-8.77	-0.32%	11	35,673	0.5%	64.1	2.4%	28.2x	2.3x	BRACBANK	57,596	1.3%	5.4	7.7x	0.9x
Textile	1,653	1,657	-4.25	-0.26%	58	171,157	2.2%	282.8	10.6%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	9,838	9,852	-14.34	-0.15%	6	37,904	0.5%	190.2	7.1%	57.3x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,056	3,064	-8.16	-0.27%	6	34,598	0.4%	13.0	0.5%	57.1x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,748	17,682	+65.59	+0.37%	3	4,342	0.1%	35.2	1.3%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	685	685	+0.40	+0.06%	5	31,682	0.4%	134.1	5.0%	53.2x	1.9x	UNILEVERCL	38,759	0.9%	1.0	39.2x	18.7x
Miscellaneous	4,151	4,148	+2.36	+0.06%	14	226,002	2.9%	144.3	5.4%	25.9x	1.8x	POWERGRID	37,347	0.8%	0.3	NM	0.3x
Corporate Bond**	3,911	3,864	+47.26	+1.22%	12	41,383	0.5%	0.5	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	-0.02	-0.02%	238	3,187,407	41.4%	0.9	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ZEALBANGLA	146.0	+9.9%	2.4	NM	NM
AMBEEPHA	838.4	+6.8%	22.9	NM	81.2x
LIBRAINFU	1,294.4	+6.2%	49.0	NM	1.0x
STANDARINS	47.0	+4.7%	15.4	19.6x	2.2x
MEGHNAPET	42.0	+4.2%	7.5	NM	NM
YPL	30.1	+4.2%	99.9	NM	5.6x
MONNOAGML	603.0	+3.9%	43.0	NM	3x
MEGHNACEM	69.4	+3.0%	1.7	NM	1.4x
1STPRIMFMF	15.1	+2.7%	3.7	NM	1.4x
EASTRNULUB	1,737.6	+2.5%	9.1	73.2x	9.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.5x	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%	12.4x	3.7x
PUBALIBANK	19,162	1.1%	4.1x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	17.2x	2.7x
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
SEAPPEARL	13,733	0.8%	28.3x	9.5x
UPGDCL	13,547	0.8%	19.6x	4.1x
PRIMEBANK	13,491	0.8%	4.9x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CENTRALPHL	17.1	-5.5%	159.6	NM	3.1x
KPPL	22.5	+1.8%	145.3	NM	NM
SEAPPEARL	174.4	-4.2%	144.7	28.3x	9.5x
GEMINISEA	596.0	-1.4%	109.3	53.0x	22.8x
PDL	12.7	-3.1%	105.4	NM	0.9x
FUWANGCER	17.8	-2.7%	103.0	68.5x	1.5x
YPL	30.1	+4.2%	99.9	NM	5.6x
BDTHAI	16.7	-7.7%	95.2	NM	0.6x
EMERALDOIL	83.3	-1.5%	87.0	42.1x	NM
DOMINAGE	16.3	-2.4%	84.4	NM	0.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BDTHAI	16.7	-7.7%	95.2	NM	0.6x
SIMTEX	17.9	-7.3%	12.4	22.7x	1x
ETL	10.2	-5.6%	41.1	22.2x	0.8x
OAL	11.9	-5.6%	48.2	NM	1.1x
CENTRALPHL	17.1	-5.5%	159.6	NM	3.1x
RSRMSTEEL	19.9	-5.2%	16.2	NM	0.4x
AZIZPIPES	110.1	-4.4%	23.9	NM	NM
SEAPPEARL	174.4	-4.2%	144.7	28.3x	9.5x
SHYAMPSUG	192.9	-4.2%	8.1	NM	NM
WMSHIPYARD	11.6	-4.1%	48.7	NM	0.6x

* 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)
SONALIPAPR	627.0	615.3	5.0	89	54.82
APEXFOOT	257.6	257.6	3.0	187	48.09
ACMEPL	35.1	31.9	10.0	1,444	46.19
BSC	107.0	107.0	1.0	200	21.40
MARICO	2,415.0	2,410.0	12.0	8	20.26
NBL	8.1	8.1	18.0	1,800	14.58
SQURPHARMA	203.6	201.5	16.0	70	14.13
AIL	77.0	75.0	3.0	95	7.20
LHBL	61.3	61.3	2.0	110	6.76
SEAPPEARL	199.0	190.0	2.0	28	5.40

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	627.0	615.3	54.8	89	5
APEXFOOT	257.6	257.6	48.1	187	3
ACMEPL	35.1	31.9	46.2	1,444	10
BSC	107.0	107.0	21.4	200	1
MARICO	2,415.0	2,410.0	20.3	8	12
NBL	8.1	8.1	14.6	1,800	18
SQURPHARMA	203.6	201.5	14.1	70	16
AIL	77.0	75.0	7.2	95	3
LHBL	61.3	61.3	6.8	110	2
SEAPEARL	199.0	190.0	5.4	28	2
CNATEX	11.2	9.2	5.1	468	3
UNIONINS	61.9	59.0	4.5	74	3
NPOLYMER	52.0	46.0	3.4	66	2
GP	261.6	261.6	3.1	12	2
PROVATIINS	53.1	53.1	2.8	52	4
GSPFINANCE	27.5	27.5	2.7	99	1
BEXIMCO	104.1	104.1	2.6	25	1
NCCBANK	14.4	14.4	2.5	173	1
LOVELLO	38.0	38.0	2.2	59	1
MPETROLEUM	204.0	204.0	2.0	10	1
ORIONINFU	314.9	265.5	2.0	7	2
CENTRALPHL	18.7	18.7	1.9	100	1
Total			298.5		128

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ALIF		0.0%	1%	Record Date	30-Nov-23
OIMEX		0.0%	0%	Record Date	30-Nov-23
LEGACYFOOT		0.0%	1%	Record Date	30-Nov-23
ATLASBANG		0.0%	0%	Record Date	30-Nov-23
GSPFINANCE		0.0%	0%	Record Date	30-Nov-23
SILVAPHL		0.0%	1%	Record Date	3-Dec-23
MHSML		0.0%	2%	Record Date	3-Dec-23
SPCL		0.0%	11%	Record Date	3-Dec-23
MEGHNACEM		5.0%	5%	Record Date	3-Dec-23

Important DSE News

JUTESPINN

The Board of Directors has recommended No dividend for the year ended June 30, 2023. Record Date: 28.12.2023. Date and Venue of the 44th AGM will be notified later on after receipt of permission from the High Court for 38th, 39th, 40th, 41st, 42nd and 43rd AGM. The Company has also reported EPS of Tk. (83.78), NAV per share of Tk. (522.19) and NOCFPS of Tk. (68.73) for the year ended June 30, 2023 as against Tk. (44.84), Tk. (438.42) and Tk. (17.05) respectively for the year ended June 30, 2022.

BDTHAI

(Q1 Un-audited): EPS was Tk. (0.19) for July-September 2023 as against Tk. (0.12) for July-September 2022; NOCFPS was Tk. (0.58) for July-September 2023 as against Tk. (0.24) for July-September 2022. NAV per share was Tk. 27.66 as on September 30, 2023 and Tk. 27.84 as on June 30, 2023.

RINGSHINE

The Board of Directors has recommended No Dividend for the year ended on June 30, 2023. Date of AGM: 20.01.2024, Time: 10:30 AM, Venue: Digital Platform. Record Date: 17.12.2023. The Company has also reported EPS of Tk. (2.53), NAV per share of Tk. (4.97) and NOCFPS of Tk. (1.07) for the year ended on June 30, 2023 as against Tk. (1.54), Tk. (2.50) and Tk. (0.65) respectively for the year ended on June 30, 2022.

APEXFOOT

Mr. Syed Manzur Elahi, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 38,500 shares of the company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 23.11.2023.

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