

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.07%) gained 4.49 points and closed at 6,223.03. The blue-chip index DS30 (+0.24%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (-0.01%) closed at 2,108.32, 1,353.21, and 1,205.62 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.05%, followed by Food & Allied (+0.04%), Telecommunication (+0.00%), NBFi (-0.01%), Fuel & Power (-0.01%), Bank (-0.02%), and Engineering (-0.05%), respectively. Block trades contributed 5.7% of the overall market turnover. Khulna Printing & Packaging Limited (+9.8%) was the most traded share with a turnover of BDT 256 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,223.03	6,218.54	+4.49	+0.07%	+0.3%
DS30	2,108.32	2,103.36	+4.96	+0.24%	-4.0%
DSES	1,353.21	1,351.29	+1.92	+0.14%	-0.4%
CDSET	1,205.62	1,205.74	-0.12	-0.01%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	68	71	170	309
A Category (Equity)	42	42	119	203
B Category (Equity)	23	23	42	88
N Category (Equity)	1	0	0	1
Z Category (Equity)	2	6	9	17
Mutual Funds	0	2	16	18
Corporate Bonds	0	0	2	2
Treasury Bonds	0	3	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,718,169	7,717,417	+0.0%
	Mn USD	69,848	69,841	
Turnover	Mn BDT	3,887	3,030	+28.3%
	Mn USD	35	27	
Volume	Mn Shares	106	82	+29.9%
No. of Trade		126,493	102,562	+23.3%

* Average Interbank Exchange Rate is BDT 110.50 as of Nov 30, 2023

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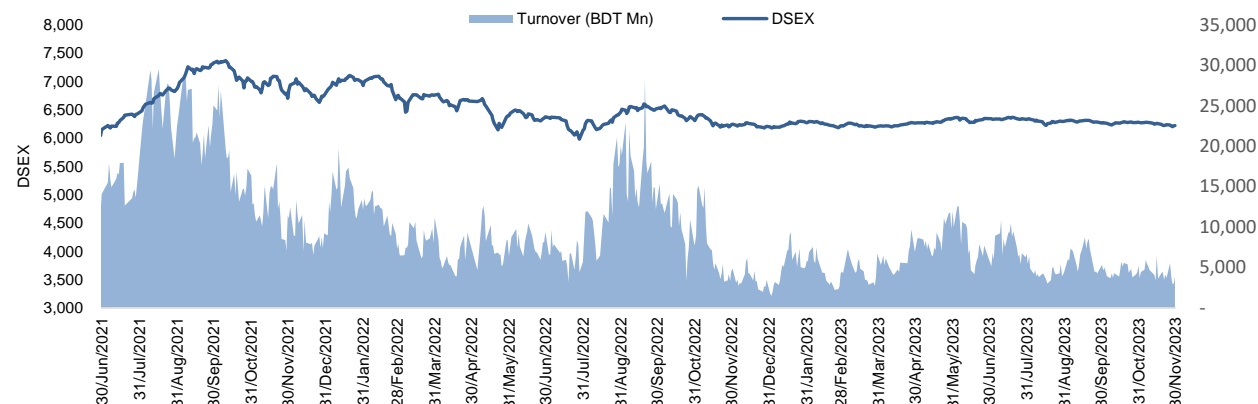


Figure: Sectorial Turnover (BDT Mn)

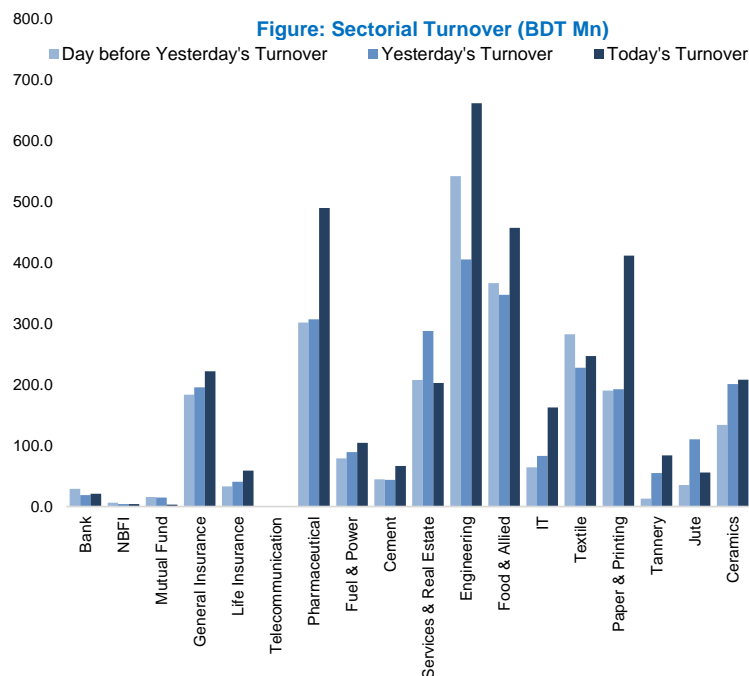
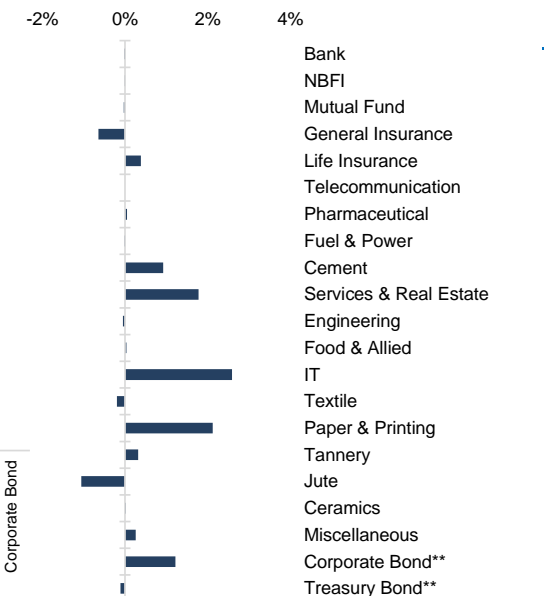


Figure: Sectorial Mcap Change



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	1,441	1,441	-0.34	-0.02%	35	679,754	8.8%	21.1	0.6%	12.4x	0.7x	GP	386,996	8.6%	0.1	12.5x	6.4x
NBFI	1,917	1,917	-0.18	-0.01%	23	186,572	2.4%	4.1	0.1%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	826	826	-0.27	-0.03%	37	39,076	0.5%	3.1	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.1	15.4x	5.7x
General Insurance	3,413	3,435	-22.08	-0.64%	42	99,737	1.3%	221.8	6.1%	18.5x	1.6x	SQURPHARMA	185,977	4.1%	0.4	9.5x	1.5x
Life Insurance	2,561	2,552	+9.77	+0.38%	15	71,592	0.9%	58.9	1.6%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.2	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,706	3,704	+1.79	+0.05%	33	716,322	9.3%	489.8	13.4%	19.5x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,698	1,698	-0.23	-0.01%	23	447,874	5.8%	104.5	2.9%	42.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,507	2,484	+22.97	+0.92%	7	120,404	1.6%	66.6	1.8%	17.1x	2.6x	BERGERPBL	79,775	1.8%	9.0	25.8x	6.3x
Services & Real Estate	1,773	1,742	+30.99	+1.78%	8	70,049	0.9%	202.6	5.5%	23.0x	0.9x	LHBL	79,554	1.8%	50.0	12.5x	3.7x
Engineering	4,499	4,502	-2.21	-0.05%	42	528,438	6.9%	661.6	18.1%	26.8x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,164	21,156	+8.01	+0.04%	21	391,613	5.1%	457.0	12.5%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,850	2,778	+71.96	+2.59%	11	37,154	0.5%	162.6	4.4%	29.4x	2.4x	BRACBANK	57,596	1.3%	0.2	7.7x	0.9x
Textile	1,650	1,654	-3.22	-0.19%	58	170,904	2.2%	246.8	6.7%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,179	9,968	+211.65	+2.12%	6	39,221	0.5%	411.4	11.2%	59.3x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,085	3,075	+9.82	+0.32%	6	34,926	0.5%	84.0	2.3%	57.5x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,948	18,140	-192.00	-1.06%	3	4,391	0.1%	55.8	1.5%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	695	695	+0.16	+0.02%	5	32,154	0.4%	208.1	5.7%	54.0x	1.9x	UNILEVERCL	38,872	0.9%	1.0	39.3x	18.8x
Miscellaneous	4,166	4,155	+10.67	+0.26%	14	226,815	2.9%	161.9	4.4%	26.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,007	3,959	+48.42	+1.22%	12	41,383	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	-0.09	-0.11%	238	3,184,454	41.3%	42.3	1.2%	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
SAMATALETH	71.1	+17.5%	51.2	NM	5.0x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	KPPL	27.0	+9.8%	256.0	NM	NM
AFTABAUTO	31.3	+11.0%	209.9	NM	0.6x	BATBC	74,086	4.3%	15.4x	5.7x	AFTABAUTO	31.3	+11.0%	209.9	NM	0.6x
GQBALLPEN	173.0	+10.0%	15.5	NM	1.5x	BEXIMCO	69,196	4.0%	34.2x	1.2x	ORIONINFU	329.7	+4.3%	198.5	NM	22.1x
EMERALDOIL	91.6	+10.0%	131.8	46.3x	NM	RENATA	68,042	3.9%	66.1x	4.4x	FUWANGFOOI	30.0	-2.6%	150.5	NM	11.5x
ADNTEL	109.5	+9.9%	54.9	NM	3.5x	BXPBARMA	45,564	2.6%	13.8x	1.4x	YPL	29.5	-2.3%	139.3	NM	5.5x
STANCERAM	131.2	+9.8%	33.0	NM	NM	BEACONPHAR	39,617	2.3%	86.9x	9.0x	EMERALDOIL	91.6	+10.0%	131.8	46.3x	NM
KPPL	27.0	+9.8%	256.0	NM	NM	GP	38,700	2.2%	12.5x	6.4x	CENTRALPHL	16.2	-4.7%	120.9	NM	2.9x
SAMORITA	97.7	+9.3%	89.8	NM	1.8x	BRACBANK	30,964	1.8%	7.7x	0.9x	PDL	11.8	-8.5%	120.2	NM	0.9x
ISNLTD	49.4	+7.6%	18.2	NM	16.4x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	FUWANGCER	18.1	-5.2%	90.3	69.6x	1.5x
PAPERPROC	220.4	+6.7%	54.3	44.0x	6.0x	LHBL	28,562	1.6%	12.5x	3.7x	SAMORITA	97.7	+9.3%	89.8	NM	1.8x

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)
PDL	11.8	-8.5%	120.2	NM	0.9x	NBL	19,116	1.1%	NM	0.9x	EMERALDOIL	91.0	75.1	9.0	606	47.72
BDTHAI	15.5	-7.7%	73.4	NM	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	SQURPHARMA	203.8	200.2	24.0	98	19.78
RSRMSTEEL	19.6	-6.2%	13.6	NM	0.4x	OLYMPIC	16,066	0.9%	17.3x	2.7x	KDSALTD	76.5	76.5	2.0	253	19.36
ETL	9.8	-5.8%	31.0	21.3x	0.8x	ROBI	15,714	0.9%	52.6x	2.4x	ISNLTD	43.6	43.3	6.0	428	18.60
AMBEEPHA	827.3	-5.4%	22.5	NM	80.1x	ALARABANK	14,357	0.8%	12.5x	1.1x	KBPPWBIL	66.5	65.0	6.0	280	18.29
FUWANGCER	18.1	-5.2%	90.3	69.6x	1.5x	BSRMLTD	14,210	0.8%	5.2x	0.6x	FINEFOODS	120.0	115.1	4.0	156	18.29
OAL	11.5	-5.0%	33.1	NM	1.0x	SEAPEARL	13,733	0.8%	29.4x	9.8x	ACMEPL	33.1	31.9	3.0	548	17.53
CENTRALPHL	16.2	-4.7%	120.9	NM	2.9x	UPGDCL	13,547	0.8%	19.6x	4.1x	ORIONINFU	329.2	329.2	2.0	19	6.09
WMSHIPYARD	11.5	-4.2%	21.7	NM	0.6x	PRIMEBANK	13,491	0.8%	4.8x	0.7x	DESHBANDHU	33.4	33.4	1.0	145	4.84
DACCADYE	13.2	-3.6%	20.8	NM	0.4x						ACMELAB	77.1	76.5	7.0	58	4.46

* 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
EMERALDOIL	91.0	75.1	47.7	606	9
SQURPHARMA	203.8	200.2	19.8	98	24
KDSALTD	76.5	76.5	19.4	253	2
ISNLTD	43.6	43.3	18.6	428	6
KBPPWBIL	66.5	65.0	18.3	280	6
FINEFOODS	120.0	115.1	18.3	156	4
ACMEPL	33.1	31.9	17.5	548	3
ORIONINFU	329.2	329.2	6.1	19	2
DESHBANDHU	33.4	33.4	4.8	145	1
ACMELAB	77.1	76.5	4.5	58	7
BRACBANK	33.0	33.0	4.1	125	3
BATBC	480.8	479.8	3.7	8	5
PREMIERBAN	12.6	12.5	3.5	280	5
EBL	29.0	29.0	2.9	100	1
DSHGARME	111.0	111.0	2.2	20	1
PTL	70.0	70.0	1.9	27	1
SAMORITA	92.0	92.0	1.8	20	1
ACFL	24.1	24.1	1.8	74	1
NCCBANK	14.4	14.4	1.6	112	1
PRAGATIINS	60.0	60.0	1.6	26	1
ESQUIRENIT	34.6	34.6	1.5	45	1
MALEKSPIN	24.5	24.5	1.5	60	1
Total			222.6		117

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ORIONPHARM		0.0%	10%	Record Date	3-Dec-23
ANWARGALV		0.0%	10%	Record Date	4-Dec-23
EASTRNLU		10.0%	60%	Record Date	4-Dec-23
HRTEX		0.0%	5%	Record Date	4-Dec-23
WMSHIPYARD		0.0%	0%	Record Date	4-Dec-23
RDFOOD		0.0%	5%	Record Date	5-Dec-23
ESQUIRENIT		0.0%	10%	Record Date	5-Dec-23
QUEENSOUTH		0.0%	6%	Record Date	5-Dec-23
LRGLOBMF1		0.0%	3%	Record Date	5-Dec-23
VAMLBDMF1		0.0%	2%	Record Date	5-Dec-23
KBPPWBIL		0.0%	0%	Record Date	5-Dec-23
SSSTEEL		0.0%	2%	Record Date	5-Dec-23
DOMINAGE		0.0%	1%	Record Date	6-Dec-23

Important DSE News

DHAKAINS

(Q3 Un-audited): EPS was Tk. 0.48 for July-September 2023 as against Tk. 0.70 for July-September 2022; EPS was Tk. 2.04 for January-September 2023 as against Tk. 2.10 for January-September 2022. NOCFPS was Tk. 0.38 for January-September 2023 as against Tk. 2.43 for January-September 2022. NAV per share (without Revaluation) was Tk. 23.56 as on September 30, 2023 and Tk. 23.36 as on December 31, 2022 and NAV per share (with Revaluation) was Tk. 34.19 as on September 30, 2023 and Tk. 33.99 as on December 31, 2022.

SILCOPHL

(Q1 Un-audited): EPS was Tk. 0.11 for July-September 2023 as against Tk. 0.29 for July-September 2022; NOCFPS was Tk. 0.16 for July-September 2023 as against Tk. 0.40 for July-September 2022. NAV per share was Tk. 22.52 as on September 30, 2023 and Tk. 22.35 as on June 30, 2023.

PTL

(Q1 Un-audited): Consolidated EPS was Tk. 1.34 for July-September 2023 as against Tk. 1.62 for July-September 2022; Consolidated NOCFPS was Tk. 1.35 for July-September 2023 as against Tk. 3.66 for July-September 2022. Consolidated NAV per share was Tk. 37.55 as on September 30, 2023 and Tk. 36.10 as on June 30, 2023.

FASFIN

(Q1 Un-audited): Consolidated EPS was Tk. (4.85) for January-March 2023 as against Tk. (6.66) for January-March 2022. Consolidated NOCFPS was Tk. (0.28) for January-March 2023 as against Tk. 0.36 for January-March 2022. Consolidated NAV per share was Tk. (91.01) as on March 31, 2023 and Tk. (40.00) as on March 31, 2022.

(Q2 Un-audited): Consolidated EPS was Tk. (9.30) for January-June 2023 as against Tk. (13.20) for January-June 2022. Consolidated NOCFPS was Tk. (1.62) for January-June 2023 as against Tk. (0.99) for January-June 2022. Consolidated NAV per share was Tk. (95.42) as on June 30, 2023 and Tk. (46.62) as on June 30, 2022.

(Q3 Un-audited): Consolidated EPS was Tk. (13.63) for January-September, 2023 as against Tk. (17.79) for January-September, 2022. Consolidated NOCFPS was Tk. (1.77) for January-September 2023 as against Tk. (1.74) for January-September 2022. Consolidated NAV per share was Tk. (99.75) as on September 30, 2023 and Tk. (51.15) as on September 30, 2022.

AFTABAUTO

The Board of Directors has recommended 10% Cash Dividend for the general shareholders excluding Sponsors and Directors for the year ended June 30, 2023. Date of AGM: 30.12.2023, Time: 12:00 PM, Venue: Digital Platform. Record date: 19.12.2023. The Company has also reported EPS of Tk. 0.04, NAV per share of Tk. 51.76 and NOCFPS of Tk. 2.39 for the year ended June 30, 2023 as against Tk. 0.01, Tk. 54.88 and Tk. 3.54 respectively for the year ended June 30, 2022. (end)

SAMATALETH

The Board of Directors has recommended 0.40% Cash Dividend for each ordinary share only for General Shareholders (except Sponsors, Directors and Placement holders) for the year ended June 30, 2023. Date of AGM: 31.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record date: 20.12.2023. The Company has also reported EPS of Tk. 0.04, NAV per share of Tk. 14.34 and NOCFPS of Tk. (0.07) for the year ended June 30, 2023 as against Tk. (0.06), Tk. 14.30 and Tk. 0.09 respectively for the year ended June 30, 2022.

TAKAFULINS

The Company has informed that as per approval accorded by Insurance Development and Regulatory Authority (IDRA), Mr. Abul Kalam Azad has assumed the Office as Chief Executive Officer of the company with effect from November 26, 2023.

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