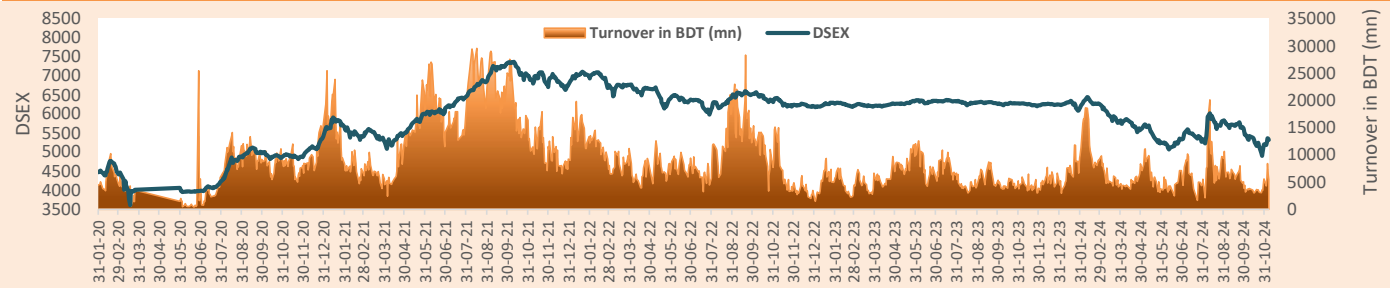


**RECENT MARKET MOVEMENT**

**DSE MARKET SUMMARY**

|                     | Today   | Yday    | Point Change | Δ Daily | Δ 1 Month | Δ YTD  | Δ 1 Year |
|---------------------|---------|---------|--------------|---------|-----------|--------|----------|
| DSEX                | 5,316   | 5,347   | ▼ (30.7)     | -0.6%   | -0.4%     | -14.9% | -15.3%   |
| DS30                | 1,966   | 1,968   | ▼ (2.2)      | -0.1%   | 1.2%      | -6.1%  | -7.7%    |
| DSMEX (SME)         | 1,065   | 1,061   | ▲ 4.5        | 0.4%    | -3.6%     | -15.7% | -13.3%   |
| Market Cap (BDT bn) | 6,718   | 6,726   | ▼ (7.9)      | -0.1%   | 1.6%      | -14.0% | -13.8%   |
| Turnover (BDT mn)   | 5,416   | 6,512   | ▼ (1,096.5)  | -16.8%  | 47.7%     | -18.0% | 4.9%     |
| Total Trade         | 174,271 | 200,032 | ▼ (25,761.0) | -12.9%  | 46.2%     | 8.0%   | 22.7%    |
| Volume (mn)         | 187     | 243     | ▼ (55.6)     | -22.9%  | 45.6%     | -15.7% | 55.6%    |

**CSE MARKET SUMMARY**

|                     | Today  | Yday   | Point Change | Daily | Δ 1 Month | Δ YTD  | Δ 1 Year |
|---------------------|--------|--------|--------------|-------|-----------|--------|----------|
| CSCX                | 9,033  | 9,046  | ▼ (13.2)     | -0.1% | -0.9%     | -18.4% | -18.8%   |
| CASPI               | 14,852 | 14,879 | ▼ (27.6)     | -0.2% | -1.1%     | -19.8% | -20.1%   |
| Market Cap (BDT bn) | 7,064  | 7,076  | ▼ (12.1)     | -0.2% | 1.1%      | -9.0%  | -8.8%    |
| Turnover (BDT mn)   | 50     | 52     | ▼ (1.7)      | -3.3% | -13.0%    | -64.5% | -9.1%    |
| Total Trade         | 2,984  | 2,598  | ▲ 386.0      | 14.9% | 35.9%     | -32.8% | 19.6%    |
| Volume ('000)       | 2,426  | 2,373  | ▲ 52.9       | 2.2%  | 28.6%     | -54.7% | 25.3%    |

**TODAY'S MARKET COMMENTARY**

The DSEX, the core index of the premier bourse, closed in the red as many investors took advantage of recent short-lived gains to book profits. Overall, the market exhibited a mixed trading pattern with investors being cautious on the bourse, selectively shifted positions toward stocks anticipated to declare strong earnings in the coming fiscal declaration. DSEX, the broad index of the Dhaka Stock Exchange, declined by 30.7 points or -0.6% and settled at 5,316 points as against 5,347 points in the previous trading session. The market exhibited volatile trading activity today as profit-taking began early in the session, with buyers and sellers actively competing to steer market momentum. Despite efforts by bargain-hunting investors to accumulate selective large-cap stocks, sellers ultimately gained control, pushing the market into negative territory again, after two consecutive sessions of gains. Trading activities also declined as market turnover decreased by 16.8% to BDT 5.4 billion as against BDT 6.5 billion in the previous session. On the sectoral front, Pharma (22.6%) issues exerted the highest turnover, followed by Bank (12.6%) and Engineering (8.6%) sectors. Most of the sectors displayed mixed returns, out of which Telecom (1.3%), Ceramic (1.0%) and Fuel & Power (0.6%) exerted the most gains while Jute (-6.1%), Engineering (-2.4%) and Mutual Fund (-1.6%) exerted most corrections on the bourse today. Out of the 397 issues traded, 94 advanced, 246 declined and 57 remained unchanged.

The port city bourse, CSE, also settled on red terrain. The selected indices (CSCX) declined by 13.2 while All Share Price Index (CASPI) advanced by 27.6 points, respectively.

**Sources:** DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

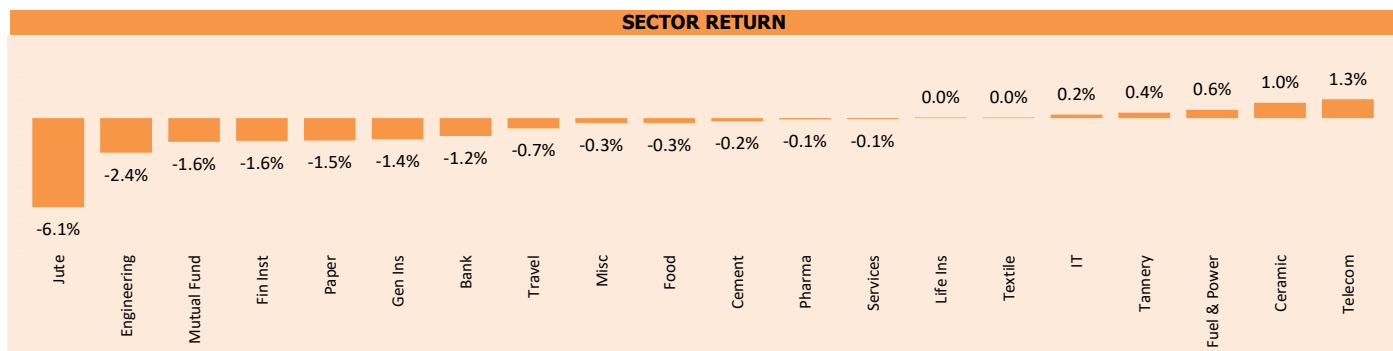
\*Turnover includes block trade in DSE; \*\*Return means Capital gain plus any dividend yield;

\*\*\*PE includes negative earnings and MFs

> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

| MARKET VALUATION |       |       | SCRIP WISE PERFORMANCE |          |           |  |
|------------------|-------|-------|------------------------|----------|-----------|--|
|                  | Today | Yday  | Advanced               | Declined | Unchanged |  |
| Market P/NAVPS   | 1.23  | 1.23  |                        |          |           |  |
| Market Fw. P/E** | 15.45 | 15.49 | ↑ 94                   | ↓ 246    | ▬ 57      |  |

| DAY'S SECTOR MOVEMENT  |                |               |                  |               |          |            |           |
|------------------------|----------------|---------------|------------------|---------------|----------|------------|-----------|
| Sector                 | Turnover (mn)  | % of T/O      | M. Cap (mn)      | % of M. Cap   | T.PE (x) | F. P/E (x) | P/NAV (x) |
| Bank                   | 679.6          | 12.6%         | 706,521          | 19.3%         | 6.5      | 6.8        | 0.7       |
| Cement                 | 29.4           | 0.5%          | 99,608           | 2.7%          | 11.2     | 13.4       | 2.1       |
| Ceramics               | 95.1           | 1.8%          | 17,003           | 0.5%          | 21.9     | 190.0      | 1.0       |
| Engineering            | 462.6          | 8.6%          | 296,075          | 8.1%          | 12.6     | 12.4       | 0.9       |
| Financial Institutions | 210.9          | 3.9%          | 123,992          | 3.4%          | 22.4     | 32.3       | (3.9)     |
| Food & Allied          | 268.7          | 5.0%          | 314,076          | 8.6%          | 40.1     | 14.8       | 4.5       |
| Fuel & Power           | 444.6          | 8.2%          | 306,162          | 8.3%          | 11.4     | 7.8        | 0.6       |
| General Insurance      | 152.6          | 2.8%          | 76,383           | 2.1%          | 14.3     | 12.7       | 1.2       |
| IT                     | 332.7          | 6.2%          | 29,476           | 0.8%          | 20.3     | 19.5       | 1.6       |
| Jute                   | 70.8           | 1.3%          | 4,184            | 0.1%          | 63.3     | 18.5       | 6.1       |
| Life Insurance         | 90.2           | 1.7%          | 50,210           | 1.4%          | 51.4     | n/a        | n/a       |
| Miscellaneous          | 208.8          | 3.9%          | 226,944          | 6.2%          | 36.8     | 31.8       | 1.7       |
| Mutual Fund            | 98.0           | 1.8%          | 29,001           | 0.8%          | 55.8     | 5.5        | 0.6       |
| Paper & Printing       | 70.7           | 1.3%          | 20,247           | 0.6%          | 27.4     | 38.1       | 0.9       |
| Pharma. & Chemicals    | 1,224.6        | 22.6%         | 572,524          | 15.6%         | 14.3     | 12.6       | 1.7       |
| Services & Real Est.   | 73.0           | 1.3%          | 17,146           | 0.5%          | 13.7     | 12.8       | 0.7       |
| Tannery                | 22.2           | 0.4%          | 22,071           | 0.6%          | 32.3     | 36.3       | 1.5       |
| Telecommunication      | 218.3          | 4.0%          | 593,763          | 16.2%         | 34.0     | 12.8       | 4.3       |
| Textile                | 388.6          | 7.2%          | 115,791          | 3.2%          | 16.8     | 17.0       | 0.8       |
| Travel & Leisure       | 268.2          | 5.0%          | 46,470           | 1.3%          | 25.9     | 14.3       | 0.4       |
| <b>Equity Market</b>   | <b>5,409.7</b> | <b>100.0%</b> | <b>3,667,648</b> | <b>100.0%</b> |          |            |           |



| TODAY'S INDEX (DSEX) PULLER <sup>&gt;</sup> |             |             | TODAY'S INDEX (DSEX) DRAGGER <sup>&gt;</sup> |             |             |
|---|-------------|-------------|--|-------------|-------------|
| TICKER                                      | %Δ in M.Cap | (+)ve Cont. | TICKER                                       | %Δ in M.Cap | (-)ve Cont. |
| BXPHARMA                                    | 6.3%        | 6.8         | ISLAMIBANK                                   | -2.5%       | (10.7)      |
| GP  | 1.7%        | 3.2         | BEACONPHAR                                   | -3.4%       | (2.8)       |
| SQURPHARMA                                  | 0.3%        | 1.5         | BRACBANK                                     | -1.2%       | (2.5)       |
| ORIONINFU                                   | 4.0%        | 0.7         | UCB  | -2.7%       | (2.0)       |
| AFTABAUTO                                   | 4.9%        | 0.6         | KOHINOOR                                     | -4.2%       | (1.7)       |
| LEGACYFOOT                                  | 9.8%        | 0.5         | CITYBANK                                     | -1.8%       | (1.7)       |
| JAMUNAOIL                                   | 1.3%        | 0.4         | EBL  | -1.2%       | (1.2)       |
| SOUTHEASTB                                  | 1.1%        | 0.4         | NBL  | -1.8%       | (1.2)       |
| SAIFPOWER                                   | 2.4%        | 0.3         | LINDEBD                                      | -4.2%       | (1.2)       |
| NAVANAPHAR                                  | 1.6%        | 0.2         | KBPPWBIL                                     | -2.7%       | (1.2)       |

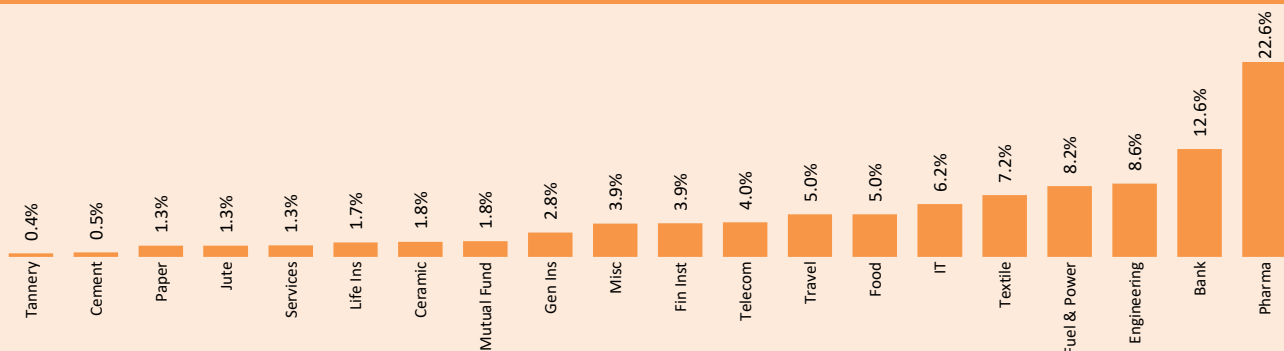
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

Note: Disclaimer has been annexed at the end of the report.

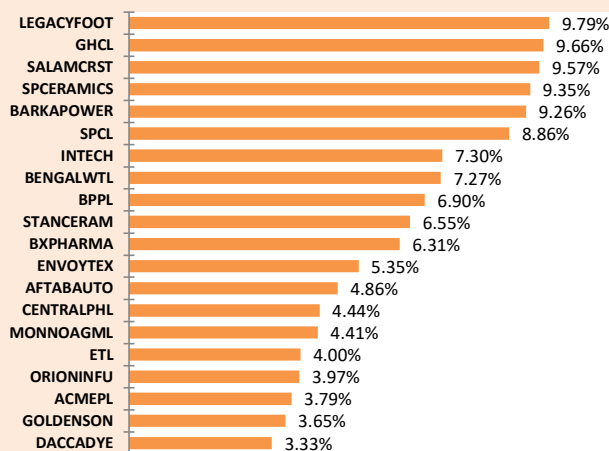
# DAILY MARKET REVIEW

Thursday, November 7, 2024

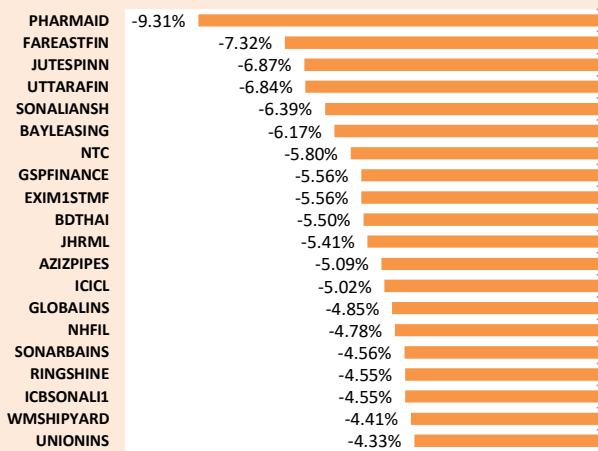
## TURNOVER DISTRIBUTION



## TOP GAINERS\*\*



## TOP LOSERS\*\*



## TOP 20 TURNOVER\* (BDT mn)

| TICKER     | Turnover | % Turnover | Price  |
|------------|----------|------------|--------|
| BXPHARMA   | 226.3    | 4.2%       | 82.5   |
| AGNISYS    | 214.6    | 4.0%       | 34.1   |
| ORIONPHARM | 212.4    | 3.9%       | 45.5   |
| GP         | 151.5    | 2.8%       | 321.1  |
| BESTHLDNG  | 136.3    | 2.5%       | 23.9   |
| BSC        | 131.7    | 2.4%       | 90.0   |
| ISLAMIBANK | 122.7    | 2.3%       | 57.6   |
| FEKDIL     | 107.4    | 2.0%       | 20.9   |
| PHARMAID   | 96.1     | 1.8%       | 615.5  |
| ORIONINFU  | 93.0     | 1.7%       | 337.8  |
| AFTABAUTO  | 91.3     | 1.7%       | 38.8   |
| MARICO     | 77.4     | 1.4%       | 2348.7 |
| LOVELLO    | 76.1     | 1.4%       | 87.6   |
| LINDEBD    | 76.0     | 1.4%       | 1015.0 |
| SEAPPEARL  | 73.2     | 1.4%       | 36.8   |
| LANKABAFIN | 71.7     | 1.3%       | 20.1   |
| BRACBANK   | 71.5     | 1.3%       | 50.9   |
| SONALIANSH | 70.1     | 1.3%       | 330.9  |
| JAMUNAOIL  | 63.7     | 1.2%       | 192.4  |
| NRBBANK    | 63.1     | 1.2%       | 12.6   |

## TOP MKT CAP (BDT mn)

| Ticker     | M. Cap (mn) | MKT. Weight | Price   |
|------------|-------------|-------------|---------|
| GP         | 433,581     | 11.8%       | 321.1   |
| BATBC      | 199,746     | 5.4%        | 369.9   |
| SQURPHARMA | 196,703     | 5.4%        | 221.9   |
| WALTONHIL  | 158,674     | 4.3%        | 523.8   |
| ROBI       | 140,377     | 3.8%        | 26.8    |
| BEXIMCO    | 103,571     | 2.8%        | 115.6   |
| ISLAMIBANK | 92,735      | 2.5%        | 57.6    |
| BRACBANK   | 90,078      | 2.5%        | 50.9    |
| BERGERPBL  | 82,158      | 2.2%        | 1,771.5 |
| RENATA     | 77,168      | 2.1%        | 672.8   |
| UPGDCL     | 76,404      | 2.1%        | 131.8   |
| MARICO     | 73,984      | 2.0%        | 2,348.7 |
| LHB        | 65,501      | 1.8%        | 56.4    |
| ICB        | 59,321      | 1.6%        | 68.4    |
| UNILEVERCL | 51,692      | 1.4%        | 2,681.9 |
| DUTCHBANGL | 41,656      | 1.1%        | 47.4    |
| BXPHARMA   | 36,804      | 1.0%        | 82.5    |
| POWERGRID  | 36,095      | 1.0%        | 39.5    |
| EBL        | 33,003      | 0.9%        | 24.3    |
| PUBALIBANK | 31,697      | 0.9%        | 27.4    |

