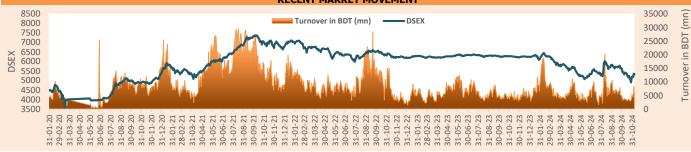
DAILY MARKET REVIEW

Thursday, November 7, 2024

RECENT MARKET MOVEMENT



]	DSE MARKET SUM	MARY			
	Today	Yday	Point Change	∆ Daily	Δ1 Month	Δ YTD	Δ1 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 SUMI	MARY			
	Today	Yday	Point Change	Daily	Δ1 Month	Δ YTD	Δ1 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

EBL Securities Ltd. 太

> 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;

EBL Securities Ltd. 💸

DAILY MARKET REVIEW

Thursday, November 7, 2024

	MARKET VALUAT	ION				SCRIP	WISE PERFOR	RMANCE	
		Today	Yday		Advanced		Decline	d L	Inchanged
Market P/NAVPS Market Fw. P/E**		1.23 15.45	1.23 15.49	1	94	₩	246		57
			DAY'S SECTOR						
Cashan	Turne even (men)	N -{ T (0					T DE ()	5 D/5 ()	D (NA) (()
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	0.8
Equity Market	5,409.7	100.0%	3,667,648		100.0%		23.5	14.5	0.4

	SECTOR RETURN																		
	-2.4%	-1.6%	-1.6%	-1.5%	-1.4%	-1.2%	-0.7%	-0.3%	-0.3%	-0.2%	-0.1%	-0.1%	0.0%	0.0%	0.2%	0.4%	0.6%	1.0%	1.3%
-6.1%																			
Jute	Engineering	Mutual Fund	Fin Inst	Paper	Gen Ins	Bank	Travel	Misc	Food	Cement	Pharma	Services	Life Ins	Textile	F	Tannery	Fuel & Power	Ceramic	Telecom

TO	DAY'S INDEX (DSEX) PULLER>			TODAY'S INDEX (DSEX) DRAGGER>	
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



TOP GAINERS**

				_
LEGACYFOOT	9.79%	PHARMAID	-9.31%	4
GHCL	9.66%	FAREASTFIN	-7.32%	
SALAMCRST	9.57%	JUTESPINN	-6.87%	Ē.,
SPCERAMICS	9.35%	UTTARAFIN	-6.84%	Ē
BARKAPOWER	9.26%	SONALIANSH	-6.39%	Ē.,
SPCL	8.86%	BAYLEASING	-6.17%	Ē.,
INTECH	7.30%	NTC	-5.80%	Ē.
BENGALWTL	7.27%	GSPFINANCE	-5.56%	Ē.
BPPL	6.90%	EXIM1STMF	-5.56%	Ē.
STANCERAM	6.55%	BDTHAI	-5.50%	Ē.
BXPHARMA	6.31%	JHRML	-5.41%	Ē.
ENVOYTEX	5.35%	AZIZPIPES	-5.09%	Ē.
AFTABAUTO	4.86%	ICICL	-5.02%	Ē
CENTRALPHL	4.44%	GLOBALINS	-4.85%	Ē.,
MONNOAGML	4.41%	NHFIL	-4.78%	Ē.
ETL	4.00%	SONARBAINS	-4.56%	Ē.
ORIONINFU	3.97%	RINGSHINE	-4.55%	Ē.
ACMEPL	3.79%	ICBSONALI1	-4.55%	Ē.
GOLDENSON	3.65%	WMSHIPYARD	-4.41%	Ē.
DACCADYE	3.33%	UNIONINS	-4.33%	1
_				-

	TOP 20 TURNOVE	R* (BDT mn)			TOP MKT CAP (BDT mn)	
TICKER	Turnover	% Turnover	Price	Ticker	M. Cap (mn)	MKT. Weight	Price
BXPHARMA	226.3	4.2%	82.5	GP	433,581	11.8%	321.1
AGNISYSL	214.6	4.0%	34.1	BATBC	199,746	5.4%	369.9
ORIONPHARM	212.4	3.9%	45.5	SQURPHARMA	196,703	5.4%	221.9
GP	151.5	2.8%	321.1	WALTONHIL	158,674	4.3%	523.8
BESTHLDNG	136.3	2.5%	23.9	ROBI	140,377	3.8%	26.8
BSC	131.7	2.4%	90.0	BEXIMCO	103,571	2.8%	115.6
ISLAMIBANK	122.7	2.3%	57.6	ISLAMIBANK	92,735	2.5%	57.6
FEKDIL	107.4	2.0%	20.9	BRACBANK	90,078	2.5%	50.9
PHARMAID	96.1	1.8%	615.5	BERGERPBL	82,158	2.2%	1,771.5
ORIONINFU	93.0	1.7%	337.8	RENATA	77,168	2.1%	672.8
AFTABAUTO	91.3	1.7%	38.8	UPGDCL	76,404	2.1%	131.8
MARICO	77.4	1.4%	2348.7	MARICO	73,984	2.0%	2,348.7
LOVELLO	76.1	1.4%	87.6	LHB	65,501	1.8%	56.4
LINDEBD	76.0	1.4%	1015.0	ICB	59,321	1.6%	68.4
SEAPEARL	73.2	1.4%	36.8	UNILEVERCL	51,692	1.4%	2,681.9
LANKABAFIN	71.7	1.3%	20.1	DUTCHBANGL	41,656	1.1%	47.4
BRACBANK	71.5	1.3%	50.9	BXPHARMA	36,804	1.0%	82.5
SONALIANSH	70.1	1.3%	330.9	POWERGRID	36,095	1.0%	39.5
JAMUNAOIL	63.7	1.2%	192.4	EBL	33,003	0.9%	24.3
NRBBANK	63.1	1.2%	12.6	PUBALIBANK	31,697	0.9%	27.4

DAILY MARKET REVIEW

EBL Securities Ltd. 📚 Thursday, November 7, 2024 UPCOMING DIVIDENDS Ticker Cash Div **Bonus Div** EPS (BDT) NAVPS (BDT) **Record Date** AGM Date Period APEXFOODS 7-Dec-24 FY 2024 20.0% 127.8 7-Nov-24 5.7 PREMIERCEM FY 2024 21.5% 7.0 7-Nov-24 30-Nov-24 -65.4 LOVELLO 10.0% 10.0% 10-Nov-24 30-Dec-24 FY 2024 1.4 13.4 SHARPIND FY 2024 1.0% 0.2 10.1 10-Nov-24 27-Nov-24 -SONALIPAPR FY 2024 40.0% 10-Nov-24 19-Dec-24 -3.8 164.7 13-Nov-24 CROWNCEMNT 21.0% 13-Nov-24 FY 2024 6.7 57.0 -

	TODAY'S TOP BLOCK TR	ANGACTIONS			UPCOMING BOARD MEETING D	NATE
Ticker	Volume ('000)	Value (mn)	Price Range	Ticker	Period	Meeting Date
MARICO	30.9	72.6	2348.4 - 2350	ENVOYTEX	Q1 2025	9-Nov-24
BXPHARMA	355.8	27.2		APEXFOODS	Q1 2025 Q1 2025	9-Nov-24
RENATA	31.0	21.9	703.5 - 707.1		Q1 2025	9-Nov-24
UNIQUEHRL	341.0	17.4	50.8 - 51.5		FY 2024	10-Nov-24
BEACONPHAR	105.2	14.2		CROWNCEMNT		10-Nov-24
		14.2	323.1 - 323.1		Q1 2025	
GP UPGDCL	40.0 82.5	9.6		AMBEEPHA	Q1 2025 FY 2024	10-Nov-24 10-Nov-24
		9.2		ECABLES		
RELIANCE1	482.0			ECABLES	Q1 2025 FY 2024	10-Nov-24
AIL SINGERBD	45.0 23.0	4.2 3.0		ZAHEENSPIN		10-Nov-24
BEXIMCO		2.6		PAPERPROC	Q1 2025	10-Nov-24 10-Nov-24
	25.2		83.3 - 83.3		FY 2024	
BSC	20.0	1.7		FINEFOODS	FY 2024	10-Nov-24
UNITEDFIN	95.4	1.5			FY 2024	10-Nov-24
BRACBANK	28.0	1.4	51.4 - 51.4		FY 2024	11-Nov-24
FIRSTSBANK	200.0	1.4	7-7	DSRIVILID	Q1 2025	12-Nov-24
LOVELLO	15.0	1.4	92.2 - 92.2			
DOMINAGE	100.0	1.2	12.2 - 12.2		OF FOTED NEWS IN DRIFE	•
NAVANAPHAR	24.0	1.1	47.1 - 47.1		SELECTED NEWS IN BRIEF	
SONALIANSH	3.0	1.1	370 - 370		n on recent news published in a new	• • •
GEMINISEA	5.0	1.1	209.9 - 209.9		November 04, 2024 regarding clarif	
KAY&QUE	3.8	1.0	267.2 - 267.2	published in a newsp	aper regarding "taking lease of land in	Hi-Tech Park in Kaliakoir"
DACCADYE	65.2	0.9	13.2 - 13.2	the company has inf	ormed DSE, among others, as follows	s: "We confirm that the
AAMRANET	27.7	0.8	30 - 30	news article accurat	ely reflects the recent agreement sig	ning ceremony between
GLDNJMF	82.0	0.8	9.6 - 9.6	ADN Telecom Limited	d and Bangladesh Hi-Tech Park. The ag	greement pertains to land
AIBL1STIMF	100.0	0.7	7 - 7	allocation for ADN	Telecom within the Bangladesh H	i-Tech Par in Kaliakoir,
MIDLANDBNK	20.0	0.6	31.6 - 31.6	GazipurAs per the	terms of the Agreement dated 20 O	ctober 2024 for Lease of
PRAGATILIF	4.0	0.6	157.1 - 157.1	Land, ADN Telecom	Limited has been granted a lease for	a portion of land within
BARKAPOWER	55.0	0.6	11 - 11	Kaliakoir Hi-Tech Pa	rk for 40 years measuring approxima	ately 4100 Square Meter
QUASEMIND	19.0	0.5	26.9 - 26.9		Manufacturing IT/ITES Devices, Softw	
ORIONINFU	1.5	0.5	335 - 335	Electronics Service C	Components etc The annual lease rei	nt for the demised land,
		-	-	fixed at USD 0.50 pe	er square meter per year, amounting	to USD 2050 per year for
		-	-		ereafter it will be USD 2 per square	
		-	-		t 10 years, the lease rent will increa	
		-	-	maximum increase o		
		-	-		20/01	
		-	-			
		-	-			
		-	-			
		-	-			
		-	-			
		-	-		GENERAL DISCLOSURE	
		-	-		ocument has been prepared by EBL	· · · ·
		-	-	for information or	nly of its clients on the basis of	the publicly available
		-	-	information in the	e market and own research. This	s document has been
		-	-	prepared for inform	nation purpose only and does not s	solicit any action based
		-	-	on the material co	ntained herein and should not be c	onstrued as an offer or
		-	-	solicitation to buy	or sell or subscribe to any security.	Neither EBLSL nor any
		-	-		nareholders, member of the man	
		-	-	-	ants expressly or impliedly that the	
		-	-	1 A A A A A A A A A A A A A A A A A A A	in the documents are genuine	· · · · · · · · · · · · · · · · · · ·
		-	-			
		_	-		rect. However all reasonable ca	
		-	_		cy of the contents of this docume	
		_	-		for any decisions made by inv	vestors based on the
		_	_	information herein		
	-	-				