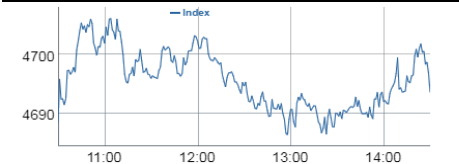


DSEX UP 5.2 POINTS

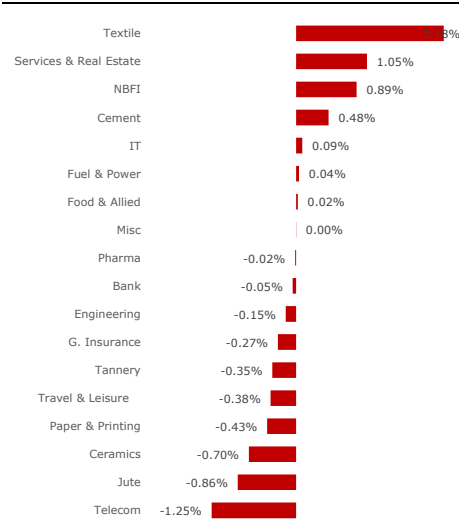
Market closed flat as the large cap sectors showed mixed performances today. Broad index, DSEX, gained 5.20 points with 17.73% increase in turnover. Telecommunication (-1.3%) continued to go down for the second consecutive session following the Supreme Court order to GP to initially pay BDT 20.0bn to Bangladesh Telecommunication Regulatory Commission (BTRC) out of its disputed claim of BDT 125.8bn dues within next three months.

General insurance and Engineering sector contributed 31.4% combined in total turnover. Textile (+2.2%), with 11.73% contribution in total turnover, also gained traction among the investors. DUTCHBANGL was the top traded scrip today. The stock was up 3.12% today.

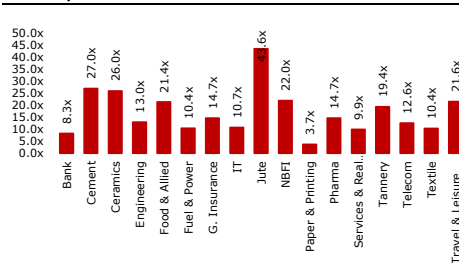
Intraday Performance of DSEX



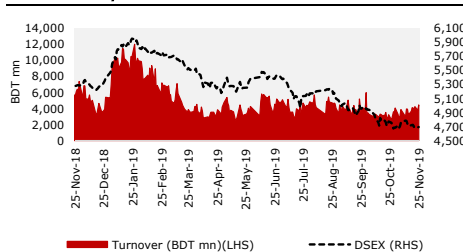
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	4,693.63	5.20	0.11%	5,385.64	-12.85%
DS30	1,635.85	(2.31)	-0.14%	1,880.78	-13.02%
DSES	1,076.64	0.82	0.08%	1,232.82	-12.67%
Dow Jones IA	27,875.62	109.33	0.39%	22,878.45	21.84%
Nikkei 225	23,292.81	179.93	0.78%	20,077.62	16.01%
FTSE 100	7,392.14	65.33	0.89%	6,617.38	11.71%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,440.80	3,772	668.81	17.73%	3,629
Turnover (USD mn)	52.87	44.90	7.96	17.73%	43
Volume (mn)	159	134	25.10	18.68%	112
Market Cap (BDT bn)	3,543	3,544	(1.11)	-0.03%	
Market Cap (USD bn)	42.18	42	(0.01)	-0.03%	
Market P/E (x)	12.47				
Particulars	Galner	Loser	Unchanged		
Market Breadth	153	125	58		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	494,420	13.96%	-0.1%	505.8	11.39%
Pharma	447,350	12.63%	0.0%	494.2	11.13%
Telecom	433,680	12.24%	-1.3%	173.9	3.92%
Fuel & Power	392,826	11.09%	0.0%	264.2	5.95%
Food & Allied	246,504	6.96%	0.0%	163.6	3.68%
NBF	136,905	3.86%	0.9%	133.3	3.00%
Engineering	112,525	3.18%	-0.2%	691.4	15.57%
Misc	98,096	2.77%	0.0%	153.0	3.45%
Cement	66,178	1.87%	0.5%	25.2	0.57%
Textile	64,633	1.82%	2.2%	520.9	11.00%
G. Insurance	52,149	1.47%	-0.3%	702.6	15.82%
Ceramics	22,822	0.64%	-0.7%	71.6	1.61%
Tannery	18,778	0.53%	-0.4%	154.8	3.49%
Travel & Leisure	18,616	0.53%	-0.4%	74.9	1.69%
Services & Real Estate	13,490	0.38%	1.0%	22.9	0.51%
IT	10,303	0.29%	0.1%	66.8	1.51%
Jute	2,792	0.08%	-0.9%	12.0	0.27%
Paper & Printing	1,769	0.05%	-0.4%	16.0	0.36%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
DUTCHBANGL	72.70	3.12%	120.29	1.69	8.10
FORTUNE	27.60	3.73%	118.79	4.29	7.19
ASIAINS	30.00	3.81%	117.82	3.92	16.30
PURABIGEN	19.20	1.05%	117.01	6.10	19.20
BEACONPHAR	36.40	-1.62%	110.27	3.04	50.56

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MEGCONMILK	11.00	10.00%	0.14	0.01	n/a
SAIHAMTEX	34.20	9.97%	1.74	0.05	27.58
PROGRESLIF	78.70	9.92%	0.99	0.01	-
AL-HAJTEX	44.80	9.80%	29.13	0.66	n/a
RNSPIN	3.40	9.68%	5.75	1.73	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BDAUTOCA	185.50	-8.26%	29.02	0.15	85.88
BANGAS	197.30	-7.50%	56.19	0.28	45.39
SHYAMPSUG	20.00	-6.54%	0.06	0.00	n/a
UNITEDINS	55.70	-6.39%	4.88	0.09	33.96
EMERALDOIL	13.90	-5.44%	0.30	0.02	115.83

Daily Market Review

Market closed flat with increasing turnover
25-Nov-2019

GP

Information on order of the Hon'ble Appellate Division and allied issues

Refer to the earlier news disseminated on April 4, 2019 and September 8, 2019 regarding demand from BTRC, the Company has further informed that on November 24, 2019, the Hon'ble Appellate Division has pronounced the order that the stay granted by the Hon'ble High Court division will sustain, subject to the payment of a deposit of Tk. 2000 crore by Grameenphone within the next 3 months. The Company also informed that that they reaffirm their commitment to resolve the audit issue by continuing with the jointly committed transparent process towards an amicable resolution with the Hon'ble ICT Advisor and relevant members of the Government. The company also informed that the existing stay order remains effective and continues to restrain BTRC from taking action based on the incorrect audit report. Therefore, the company look forward to BTRC to immediately comply with the valid injunction order and not to obstruct Grameenphone from proceeding with its planned network expansion and offer products & services to its customers.

CONFIDCEM

Commercial Operation of power plant by Confidence Power Bogra Limited

The Company has informed that the Board of Directors has agreed with the decision taken in the Board of Directors of Confidence Power Holdings Limited, an associate of Confidence Cement Limited having 41% stake in its equity capital, that upon successful testing and commissioning the Confidence Power Bogra Limited, a 99% subsidiary of Confidence Power Holdings Ltd, has started commercial operation of its HFO based, Net 113 MW Power Plant situated at Nator-Bogura Highway at Birgram, Bogura, consisting of Unit of MAN Diesel & Turbo SE (Engine) supplied By Germany, XD (Sub-station) by China, MAN (Turbine) and ME (Boiler) by India to sell the whole production of electricity to the Bangladesh Power Development Board (BPDB).

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BANKASIA	21.4	21.4	1	934,500	20.0
BRACBANK	61.0	61.0	1	20,000	1.2
FEDERALINS	15.7	15.7	1	34,000	0.5
ICBEPMF1S1	4.7	4.7	1	150,000	0.7
MERCINS	36.5	36.5	1	200,000	7.3
SHURWID	30.3	30.3	3	61,200	1.9
SSSTEEL	31.5	31.5	1	100,000	3.2
VFSTDL	24.4	24.4	1	26,000	0.6

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
ISNLTD	IT	12-Dec-19	24-Nov-19	6-Nov-19	21-Nov-19
RNSPIN	Textile	22-Dec-19	24-Nov-19	6-Nov-19	21-Nov-19
FUWANGFOOD	Food & Allied	18-Dec-19	24-Nov-19	20-Nov-19	21-Nov-19
SAMATALETH	Tannery	24-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
ARAMITCEM	Cement	22-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
GOLDENSON	Engineering	26-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
SPCERAMICS	Ceramics	21-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
KPPL	Paper & Printir	31-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
IMAMBUTTON	Pharma	28-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
BXSYNTH	Pharma	21-Dec-19	25-Nov-19	12-Nov-19	24-Nov-19
ORIONINFU	Pharma	15-Dec-19			
PREMIERCEM	Cement	21-Dec-19			
KOHINOOR	Pharma	15-Dec-19			
BEACONPHAR	Pharma	24-Dec-19			
SAPORTL	Services & Res	12-Dec-19			
GHAIL	Food & Allied	28-Dec-19	18-Nov-19		
ACIFORMULA	Pharma	23-Dec-19	3-Dec-19		
SPCL	Fuel & Power	30-Jan-20	3-Dec-19		
GBBPOWER	Fuel & Power	18-Dec-19	3-Dec-19		
LEGACYFOOT	Tannery	1-Feb-20	4-Dec-19		

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Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between +15 % and -5 %
Underweight	12 Months	Less than -5 %

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