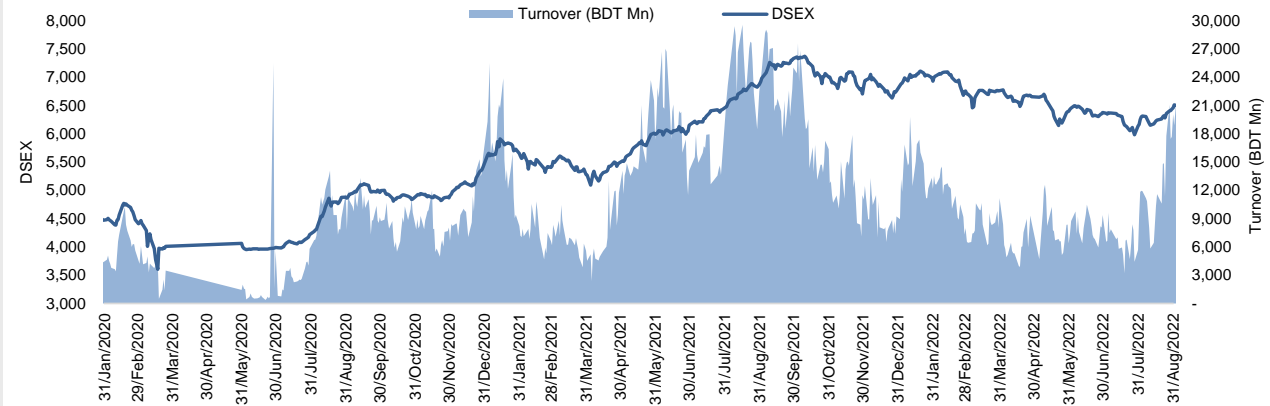


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.62%) gained 39.65 points and closed at 6,471.00. The blue-chip index DS30 (+0.90%), the Shariah-based index DSES (+1.01%), and the large-cap index CDSET (+0.66%) closed at 2,306.46, 1,418.82, and 1,265.28 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.02% followed by Bank (-0.25%), Fuel & Power (-0.25%), Food & Allied (-0.19%), Telecommunication (-0.15%), Engineering (+0.18%), and Pharmaceutical (+1.67%), respectively. Block trades contributed 0.7% of the overall market turnover. Orion Pharma Ltd. (+9.9%) was the most traded share with a turnover of BDT 766 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,471.00	6,431.35	+39.65	+0.62%	-4.2%
DS30	2,306.46	2,285.80	+20.67	+0.90%	-8.9%
DSES	1,418.82	1,404.58	+14.24	+1.01%	-0.9%
CDSET	1,265.28	1,256.95	+8.33	+0.66%	-6.9%

	Advanced	Declined	Unchanged	Total
All Category	127	146	94	367
A Category (Equity)	88	107	51	246
B Category (Equity)	32	37	24	93
N Category (Equity)	4	0	2	6
Z Category (Equity)	3	2	17	22
Mutual Funds	2	7	12	21
Corporate Bonds	2	1	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,194,981	5,179,969	
	Mn USD	54,684	54,526	+0.3%
Turnover	Mn BDT	13,150	14,007	-6.1%
	Mn USD	138	147	
Volume	Mn Shares	257	311	-17.4%
No. of Trade		212,438	233,509	-9.0%

\* Exchange Rate is BDT 95.00 as of Sep 06, 2022

<b>Fahim Hassan</b> Research Associate (880) 1709636546 fahim.hassan@bracepl.com	<b>Billal Hossain</b> Research Associate (880) 1708805229 billal.hossain@bracepl.com
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Figure: Sectorial Turnover (BDT)

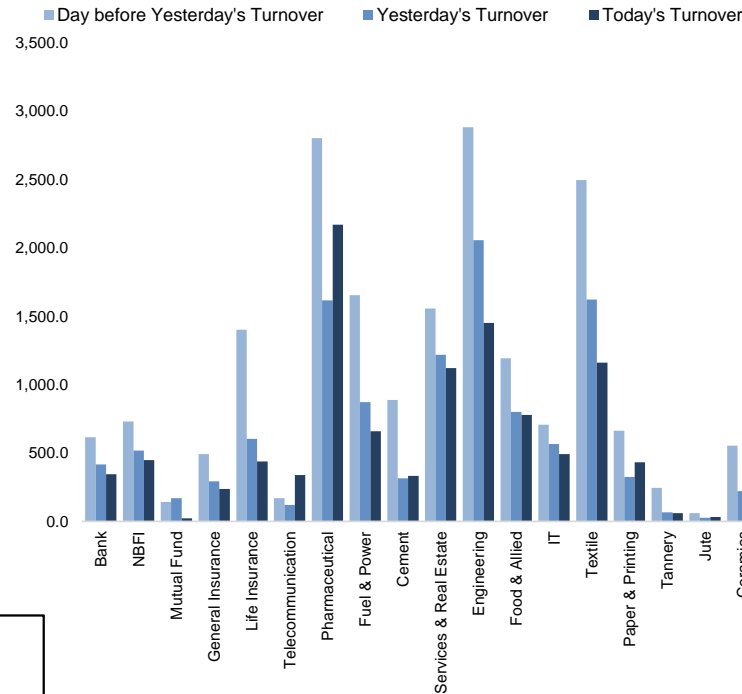
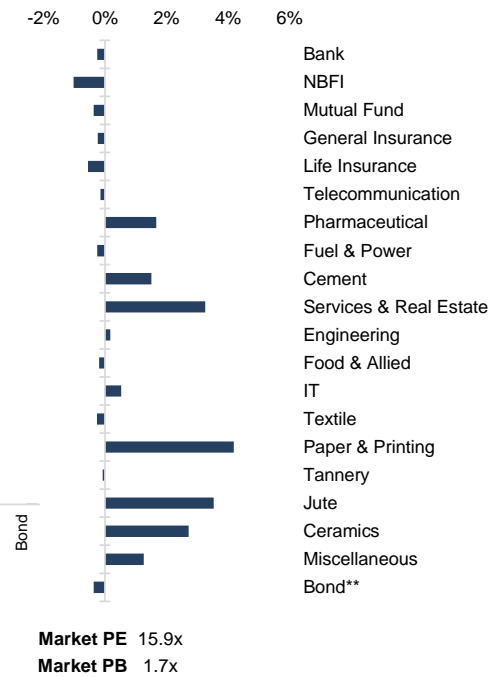


Figure: Sectorial Mcap Change



Market PE 15.9x

Market PB 1.7x

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	1,456	1,459	-3.71	-0.25%	33	668,636	14.6%	344.8	2.7%	7.8x	0.8x	GP	387,131	8.4%	35.8	11.4x	7.7x
NBFI	2,064	2,085	-21.35	-1.02%	23	203,019	4.4%	449.0	3.5%	NM	3.9x	WALTONHIL	317,378	6.9%	1.1	26.1x	3.1x
Mutual Fund	883	887	-3.26	-0.37%	36	39,046	0.9%	22.5	0.2%	NM	0.8x	BATBC	280,098	6.1%	161.4	18.1x	7.4x
General Insurance	3,270	3,277	-7.64	-0.23%	41	94,975	2.1%	238.2	1.9%	15.3x	1.5x	SQURPHARMA	188,282	4.1%	44.2	10.2x	1.9x
Life Insurance	2,456	2,470	-13.66	-0.55%	13	68,591	1.5%	439.4	3.5%	NM	NM	ROBI	157,138	3.4%	2.0	NM	2.4x
Telecommunication	4,963	4,971	-7.39	-0.15%	3	583,154	12.7%	339.5	2.7%	15.5x	4.6x	RENATA	140,412	3.1%	18.2	25.4x	4.9x
Pharmaceutical	3,935	3,870	+64.61	+1.67%	32	738,695	16.1%	2,169.4	17.0%	18.2x	2.6x	UPGDCL	138,025	3.0%	8.0	11.2x	4.2x
Fuel & Power	1,756	1,760	-4.41	-0.25%	23	464,143	10.1%	659.1	5.2%	11.6x	1.2x	BEXIMCO	106,122	2.3%	754.8	7.4x	1.4x
Cement	2,722	2,682	+40.44	+1.51%	7	128,801	2.8%	333.6	2.6%	28.0x	2.8x	LHBL	90,703	2.0%	299.2	23.2x	5.1x
Services & Real Estate	1,684	1,631	+53.15	+3.26%	8	64,423	1.4%	1,121.6	8.8%	89.6x	1.2x	BERGERPBL	83,248	1.8%	2.8	27.0x	7.3x
Engineering	4,636	4,628	+8.15	+0.18%	42	543,266	11.8%	1,451.1	11.4%	20.5x	1.9x	ICB	80,420	1.8%	5.0	45.5x	1.8x
Food & Allied	21,511	21,552	-41.49	-0.19%	21	384,027	8.4%	778.3	6.1%	23.0x	8.1x	MARICO	77,796	1.7%	8.8	22.2x	33.8x
IT	2,619	2,605	+13.77	+0.53%	11	33,958	0.7%	491.8	3.9%	27.6x	2.4x	BXPBARMA	75,482	1.6%	93.9	13.2x	1.9x
Textile	1,730	1,735	-4.49	-0.26%	58	182,482	4.0%	1,160.0	9.1%	27.4x	1.1x	BEACONPHAR	67,983	1.5%	73.1	72.7x	11.7x
Paper & Printing	11,347	10,891	+456.21	+4.19%	6	41,963	0.9%	432.2	3.4%	NM	2.9x	BRACBANK	57,619	1.3%	7.2	11.3x	1.0x
Tannery	3,109	3,111	-2.18	-0.07%	6	33,496	0.7%	60.8	0.5%	35.3x	3.2x	ISLAMIBANK	52,808	1.2%	8.0	10.8x	0.8x
Jute	9,472	9,149	+323.49	+3.54%	3	2,238	0.0%	31.7	0.2%	NM	31.6x	DUTCHBANGL	45,085	1.0%	3.8	7.8x	1.2x
Ceramics	782	761	+20.69	+2.72%	5	35,211	0.8%	285.2	2.2%	33.0x	2.1x	TITASGAS	42,833	0.9%	66.1	12.8x	0.6x
Miscellaneous	4,428	4,373	+55.05	+1.26%	15	245,333	5.3%	1,923.1	15.1%	12.0x	2.1x	POWERGRID	40,269	0.9%	77.1	11.0x	0.4x
Bond**	89	90	-0.32	-0.36%	9	36,998	0.8%	4.4	0.0%	NM	NM	BSCCL	38,885	0.8%	301.7	16.9x	3.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SINOBANGLA	74.8	+10.0%	121.2	42.3x	2.8x
BPML	73.1	+9.9%	295.2	27.0x	1.6x
ORIONPHARM	106.5	+9.9%	766.2	26.0x	1.3x
SEAPEARL	68.9	+9.9%	121.8	NM	6.0x
BEACONPHAR	294.3	+8.7%	73.1	72.7x	11.7x
ORIONINFU	354.4	+8.6%	286.2	NM	26.2x
HAKKANIPUL	72.8	+8.2%	35.6	NM	3x
KOHINOOR	548.5	+7.5%	126.8	49.9x	9.7x
RSRMSTEEL	22.1	+7.3%	24.9	NM	0.5x
BDWELDING	26.0	+7.0%	24.3	NM	2.3x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,193	7.1%	10.2x	1.9x
BATBC	74,086	4.3%	18.1x	7.4x
BEXIMCO	73,702	4.2%	7.4x	1.4x
RENATA	68,549	3.9%	25.4x	4.9x
BXPBARMA	52,702	3.0%	13.2x	1.9x
BEACONPHAR	47,588	2.7%	72.7x	11.7x
GP	38,713	2.2%	11.4x	7.7x
LHBL	32,036	1.8%	23.2x	5.1x
BRACBANK	30,976	1.8%	11.3x	1.0x
EBL	23,956	1.4%	7.6x	1.0x
ISLAMIBANK	23,721	1.4%	10.8x	0.8x
PUBALIBANK	20,075	1.2%	5.9x	0.7x
NBL	19,116	1.1%	NM	0.5x
CITYBANK	18,584	1.1%	4.9x	0.7x
OLYMPIC	17,246	1.0%	19.4x	3.1x
ORIONPHARM	16,951	1.0%	26.0x	1.3x
ROBI	15,714	0.9%	NM	2.4x
BSRMLTD	15,458	0.9%	5.3x	0.7x
ALARABANK	14,609	0.8%	12.0x	1.1x
IFIC	14,297	0.8%	12.4x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONPHARM	106.5	+9.9%	766.2	26.0x	1.3x
BEXIMCO	121.1	+0.7%	754.8	7.4x	1.4x
JHRML	97.1	+6.9%	487.4	32.8x	3.2x
BSC	135.9	+3.6%	463.6	10.1x	2.0x
EHL	92.9	-1.9%	428.0	18.8x	1.3x
NAHEEACP	84.5	+5.2%	331.9	29.0x	4.5x
BSCCL	235.8	+2.7%	301.7	16.9x	3.5x
LHBL	78.1	+2.1%	299.2	23.2x	5.1x
BPML	73.1	+9.9%	295.2	27.0x	1.6x
ORIONINFU	354.4	+8.6%	286.2	NM	26.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PHOENIXFIN	16.9	-10.1%	86.7	NM	1.0x
UNIONCAP	10.6	-7.0%	25.2	NM	NM
NTC	725.2	-6.8%	80.1	NM	13.9x
SEMLFBSLGF	8.4	-5.6%	5.4	NM	0.8x
DBH1STMF	6.9	-5.5%	0.5	NM	0.8x
IFILISLMF1	6.4	-3.0%	0.2	NM	1.0x
GREENDEL MF	6.9	-2.8%	0.8	NM	0.8x
DBH	58.7	-2.7%	11.9	10.5x	1.5x
HWAWELLTEX	47.8	-2.6%	5.9	10.9x	1.5x
PREMIERLEA	7.5	-2.6%	2.6	NM	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	326.4	297.9	6.0	318	96.88
SEAPEARL	65.5	63.5	10.0	1,098	70.45
FORTUNE	85.0	79.6	5.0	736	59.44
ORIONPHARM	106.5	98.0	12.0	385	39.50
BEACONPHAR	294.3	260.0	16.0	116	33.45
BATBC	518.7	518.7	5.0	45	23.34
NBL	9.1	9.1	1.0	2,000	18.20
GENEXIL	82.0	82.0	1.0	200	16.40
NAHEEACP	80.0	79.0	6.0	192	15.34
GP	288.2	286.7	2.0	35	10.05

\*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.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ORIONINFU	326.4	297.9	96.9	318	6
SEAPEARL	65.5	63.5	70.4	1,098	10
FORTUNE	85.0	79.6	59.4	736	5
ORIONPHARM	106.5	98.0	39.5	385	12
BEACONPHAR	294.3	260.0	33.5	116	16
BATBC	518.7	518.7	23.3	45	5
NBL	9.1	9.1	18.2	2,000	1
GENEXIL	82.0	82.0	16.4	200	1
NAHEEACP	80.0	79.0	15.3	192	6
GP	288.2	286.7	10.1	35	2
LHBL	84.0	83.3	5.6	67	2
DELTALIFE	165.0	165.0	4.3	26	2
MARICO	2,470.0	2,470.0	2.5	1	1
BBSCABLES	52.5	52.5	2.5	47	1
NPOLYMER	70.5	70.0	2.3	32	2
SQURPHARMA	212.5	212.5	2.1	10	1
JHRML	93.7	93.7	1.9	20	1
KOHINOOR	548.5	502.0	1.9	4	3
MONNOFABR	26.8	26.8	1.6	60	1
SAIFPOWER	35.8	35.8	1.3	36	1
HRTEX	127.5	127.5	1.1	9	1
MHSML	32.3	32.3	0.9	27	1
<b>Total</b>			<b>414.9</b>		<b>88</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CAPM BDBL Mutual Fund 01	-	0.0%	8.0%	Record Date	11-Sep-22
CAPM IBBL Islamic Mutual Fund	-	0.0%	8.0%	Record Date	11-Sep-22
Fareast Finance & Investment Limited	-	0.0%	0.0%	Record Date	11-Sep-22
MIDAS Financing Ltd.	-	1.0%	0.0%	Record Date	11-Sep-22
International Leasing & Financial Services Ltd.	-	0.0%	0.0%	Record Date	15-Sep-22
Sandhani Life Insurance Company Ltd.	-	0.0%	12.0%	Record Date	21-Sep-22
Meghna Life Insurance Co. Ltd.	-	10.0%	15.0%	Record Date	25-Sep-22
The IBN SINA Pharmaceutical Industry Ltd.	-	0.0%	60.0%	Record Date	29-Sep-22
Phoenix Finance and Investments Ltd.	-	0.0%	0.0%	Record Date	13-Oct-22

**Important DSE News**

**IBNSINA**

The Board of Directors has recommended 60% Cash Dividend for the year ended June 30, 2022. Date of AGM: 30.10.2022, Time: 9:30 AM, Venue: Digital Platform. Record Date: 29.09.2022. The Company has also reported Consolidated EPS of Tk. 19.39, Consolidated NAV per share of Tk. 83.36 and Consolidated NOCFPS of Tk. 13.40 for the year ended June 30, 2022 as against Tk. 15.66, Tk. 68.69 and Tk. 17.67 respectively for the same period of the previous year.

**IBNSINA**

The Company has informed that the Board of Directors has approved purchasing of a land measuring 27 decimals at a cost of BDT 2,30,00,000/- (two crore and thirty lac) only excluding registration and other related expenses located at Zhilanzha Mouza, Cox's Bazar Sadar, Cox's Bazar. The land will be used for constructing sales depot and training center of the company.

**IBNSINA**

The Company has informed that the Board of Directors of the Company has decided to transfer a part of the Net Assets aggregated value of BDT 20,81,69,670.00 as at June 30, 2022 of Natural Medicine Division of The IBN SINA Pharmaceutical Industry Ltd. to its Subsidiary Company, "The IBN SINA Natural Medicine Ltd." for better management and to make ease of operation of its natural medicine production and businesses subject to approval by the Shareholders of The IBN SINA Pharmaceutical Industry Ltd. as 'Special Resolution' in the ensuing Annual General Meeting of the Company scheduled to be held on October 30, 2022 and compliance with the necessary regulatory requirements in this regard. The Company has further informed that the Board has also approved the 'Vendors Agreement' executed between The IBN SINA Pharmaceutical Industry Ltd. (Holding Company) and The IBN SINA Natural Medicine Ltd. (Subsidiary Company) to effect the transfer of said Net Assets at BDT 20,81,69,670.00 as at June 30, 2022 of Natural Medicine Division of The IBN SINA Pharmaceutical Industry Ltd. to its 99.99 % owned Subsidiary Company- The IBN SINA Natural Medicine Ltd. in exchange of consideration other than cash as against acquiring of Shares held by the holding Company, The IBN SINA Pharmaceutical Industry Ltd.

**PHOENIXFIN**

The Board of Directors has recommended No dividend for the year ended December 31, 2021. Date of AGM: 08.12.2022, Time: 11:30 AM, Venue: Digital Platform, Link: <http://phoenixfinance.bdvirtualagm.com>. Record date: 13.10.2022. The Company has also reported EPS of Tk. (2.11), NAV per share of Tk. 17.54 and NOCFPS of Tk. (8.26) for the year ended December 31, 2021 as against Tk. 1.21, Tk. 19.65 and Tk. 4.69 respectively for the same period of the previous year.

**PHOENIXFIN**

**(Q1 Un-audited):** EPS was Tk. 0.08 for January-March 2022 as against Tk. 0.40 for January-March 2021. NOCFPS was Tk. (0.25) for January-March 2022 as against Tk. 0.84 for January-March 2021. NAV per share was Tk. 17.62 as on March 31, 2022 and Tk. 17.54 as on December 31, 2021.

**(Q2 Un-audited):** EPS was Tk. (0.07) for April-June 2022 as against Tk. 0.16 for April-June 2021; EPS was Tk. 0.01 for January-June 2022 as against Tk. 0.56 for January-June 2021. NOCFPS was Tk. 0.90 for January-June 2022 as against Tk. 0.26 for January-June 2021. NAV per share was Tk. 17.55 as on June 30, 2022 and Tk. 17.54 as on December 31, 2021.

**NCCBANK**

Mr. M.A. Quasem, one of the Sponsors of the Company, has expressed his intention to sell 2,00,000 shares out of his holdings of 52,00,000 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

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**PAPERPROC**

Bangladesh Development Group Ltd., one of the Corporate Directors of the Company, has further informed that it has completed its sale of 4,36,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 19.07.2022.

**FIRSTFIN**

The Company has informed that the Board of Directors and subsequent approval from Bangladesh Bank, Mr. Gaus-ul-Wara Md. Mortaza has been appointed as the Managing Director and CEO of the Company, effective from August 31, 2022.

**FAREASTLIF**

The Company has informed that the Board of Directors has decided to sell one property of 13.00 Decimals land situated at Mouja- Rogonathpur, Thana- Kotuali, Poursova- Rangpur, District- Rangpur at a price of BDT 4,86,99,000.00. The sale decision of the property has been approved by the Insurance Development and Regulatory Authority. The above amount will be used for payments of policyholders claims.

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