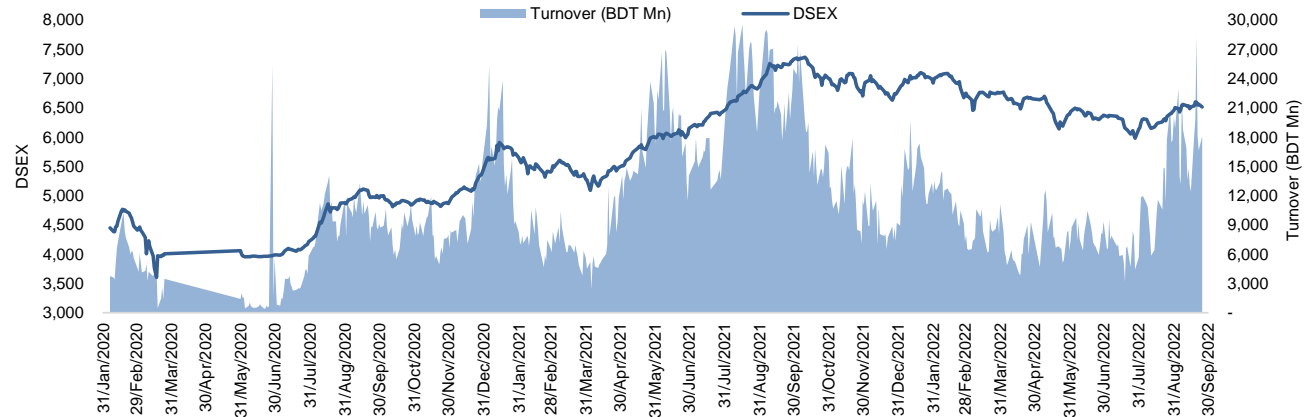


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.74%) lost 48.84 points and closed at 6,515.16. The blue-chip index DS30 (-1.51%), the Shariah-based index DSES (-1.09%), and the large-cap index CDSET (-1.17%) closed at 2,329.92, 1,421.01, and 1,270.70 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 2.06% followed by Fuel & Power (-1.16%), Telecommunication (-0.12%), Bank (-0.07%), Food & Allied (-0.04%), NBFIs (+0.28%), and Engineering (+0.42%), respectively. Block trades contributed 0.7% of the overall market turnover. Orion Pharma Ltd. (-9.7%) was the most traded share with a turnover of BDT 1,792 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,515.16	6,564.00	-48.84	-0.74%	-3.6%
DS30	2,329.92	2,365.69	-35.77	-1.51%	-8.0%
DSES	1,421.01	1,436.72	-15.71	-1.09%	-0.7%
CDSET	1,270.70	1,285.73	-15.03	-1.17%	-6.5%

	Advanced	Declined	Unchanged	Total
All Category	95	117	161	373
A Category (Equity)	62	87	105	254
B Category (Equity)	31	25	37	93
N Category (Equity)	0	3	3	6
Z Category (Equity)	2	2	16	20
Mutual Funds	1	0	29	30
Corporate Bonds	1	0	3	4

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,206,518	5,227,440	-0.4%
	Mn USD	50,840	51,044	
Turnover	Mn BDT	18,105	16,661	+8.7%
	Mn USD	177	163	
Volume	Mn Shares	314	272	+15.6%
No. of Trade		262,337	241,297	+8.7%

* Average Interbank Exchange Rate is BDT 102.41 as of Sep 22, 2022

Figure: Sectorial Turnover (BDT)

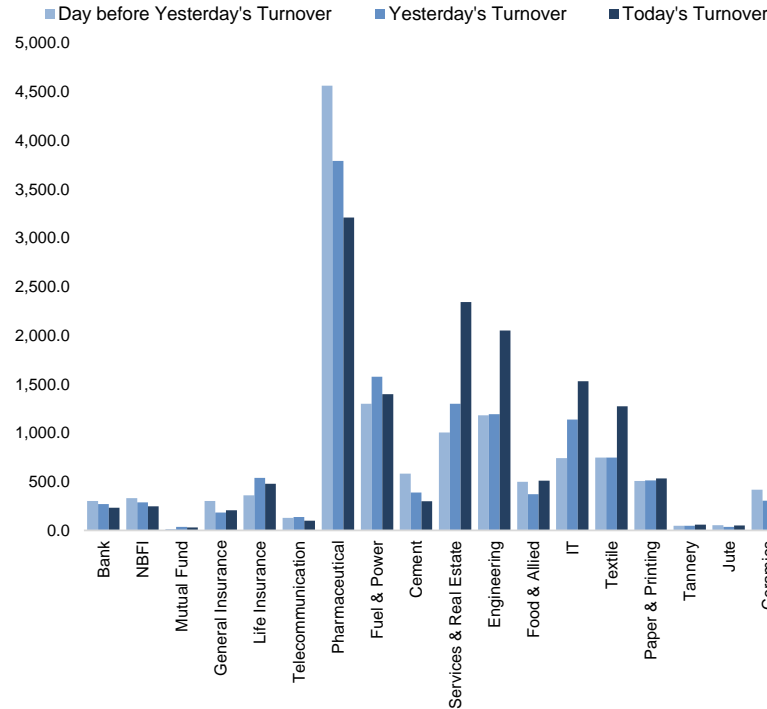
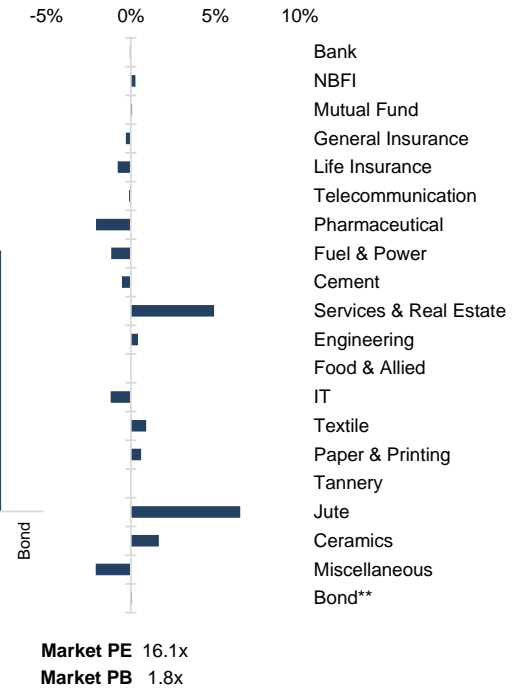


Figure: Sectorial Mcap Change



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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	1,444	1,445	-0.95	-0.07%	33	665,644	14.4%	231.9	1.3%	7.8x	0.8x	GP	386,996	8.4%	13.0	11.4x	7.7x
NBFI	2,018	2,012	+5.56	+0.28%	23	196,832	4.3%	245.7	1.4%	NM	3.9x	WALTONHIL	317,378	6.9%	0.3	26.1x	3.1x
Mutual Fund	855	854	+0.71	+0.08%	36	37,653	0.8%	29.4	0.2%	NM	0.8x	BATBC	280,098	6.1%	22.0	18.1x	7.4x
General Insurance	3,177	3,186	-9.26	-0.29%	41	92,143	2.0%	207.4	1.2%	14.8x	1.5x	SQRUPHARMA	185,977	4.0%	26.0	10.0x	1.9x
Life Insurance	2,484	2,503	-19.24	-0.77%	13	68,976	1.5%	479.2	2.7%	NM	NM	ROBI	157,138	3.4%	0.6	NM	2.4x
Telecommunication	4,959	4,964	-5.76	-0.12%	3	581,749	12.6%	98.3	0.6%	15.5x	4.6x	RENATA	139,694	3.0%	26.4	25.2x	4.9x
Pharmaceutical	3,942	4,025	-83.06	-2.06%	32	752,482	16.3%	3,208.3	18.2%	18.6x	2.7x	UPGDCL	137,678	3.0%	37.7	11.1x	4.2x
Fuel & Power	1,750	1,770	-20.52	-1.16%	23	461,320	10.0%	1,398.3	7.9%	11.7x	1.2x	BEXIMCO	115,411	2.5%	1,145.9	8.0x	1.5x
Cement	2,628	2,642	-14.00	-0.53%	7	126,201	2.7%	299.1	1.7%	27.5x	2.7x	LHBL	89,193	1.9%	279.9	22.9x	5.0x
Services & Real Estate	1,942	1,851	+91.24	+4.93%	8	76,730	1.7%	2,343.2	13.3%	95.0x	1.5x	BERGERPBL	81,287	1.8%	1.3	26.4x	7.1x
Engineering	4,613	4,593	+19.34	+0.42%	42	541,480	11.8%	2,049.5	11.6%	20.4x	1.9x	ICB	78,325	1.7%	5.7	44.3x	1.7x
Food & Allied	21,388	21,397	-8.73	-0.04%	21	381,104	8.3%	510.3	2.9%	22.9x	8.0x	MARICO	76,888	1.7%	3.9	22.0x	33.4x
IT	2,863	2,898	-34.69	-1.20%	11	37,327	0.8%	1,531.6	8.7%	30.3x	2.6x	BXPHERMA	76,419	1.7%	169.7	13.3x	1.9x
Textile	1,692	1,677	+15.12	+0.90%	58	178,019	3.9%	1,274.3	7.2%	26.7x	1.1x	BEACONPHAR	72,696	1.6%	87.3	77.7x	12.5x
Paper & Printing	11,102	11,035	+67.15	+0.61%	6	42,776	0.9%	533.4	3.0%	NM	2.9x	BRACBANK	57,619	1.3%	23.2	11.3x	1.0x
Tannery	3,146	3,146	-0.60	-0.02%	6	33,871	0.7%	58.3	0.3%	35.8x	3.3x	ISLAMIBANK	52,486	1.1%	15.9	10.8x	0.8x
Jute	11,211	10,528	+682.80	+6.49%	3	2,743	0.1%	50.8	0.3%	NM	38.7x	DUTCHBANGL	44,389	1.0%	2.6	7.7x	1.2x
Ceramics	739	727	+12.06	+1.66%	5	34,181	0.7%	373.7	2.1%	32.1x	2.1x	TITASGAS	40,954	0.9%	30.2	12.2x	0.6x
Miscellaneous	4,621	4,719	-98.04	-2.08%	15	259,220	5.6%	2,675.7	15.2%	12.6x	2.2x	POWERGRID	38,701	0.8%	50.9	10.6x	0.4x
Bond**	90	90	+0.05	+0.06%	9	37,146	0.8%	2.5	0.0%	NM	NM	BSCCL	37,615	0.8%	84.8	16.3x	3.4x

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
MONOSPOOL	203.9	+10.0%	39.3	67.0x	4.8x	SQRUPHARMA	121,685	6.9%	10.0x	1.9x	ORIONPHARM	135.1	-9.7%	1,791.9	32.9x	1.6x
SEAPEARL	137.6	+9.9%	232.7	NM	11.9x	BEXIMCO	80,153	4.6%	8.0x	1.5x	BEXIMCO	131.7	-2.1%	1,145.9	8.0x	1.5x
FEKDIL	21.2	+9.8%	76.7	32.1x	1.1x	BATBC	74,086	4.2%	18.1x	7.4x	UNIQUEHRL	79.2	+6.5%	976.5	27.0x	0.8x
AOL	44.7	+9.8%	97.5	22.4x	2.5x	RENATA	68,199	3.9%	25.2x	4.9x	BDCOM	59.0	+6.5%	844.7	39.4x	3.8x
NAHEEACP	74.6	+9.4%	324.3	25.6x	4.0x	BXPHERMA	53,356	3.0%	13.3x	1.9x	BSC	158.0	-6.5%	620.7	11.7x	2.3x
APEXFOODS	230.5	+8.7%	34.5	80.9x	1.7x	BEACONPHAR	50,887	2.9%	77.7x	12.5x	JHRML	120.7	-8.2%	584.2	40.8x	3.9x
NORTHERN	263.1	+8.7%	9.1	NM	3x	GP	38,700	2.2%	11.4x	7.7x	EHL	94.5	+1.5%	577.7	16.1x	1.3x
PAPERPROC	253.2	+8.7%	36.5	83.0x	8.5x	LHBL	31,503	1.8%	22.9x	5.0x	SPCL	93.1	-7.6%	419.7	12.4x	2.4x
SUNLIFEINS	64.2	+7.9%	19.8	NM	NM	BRACBANK	30,976	1.8%	11.3x	1.0x	BBS	28.2	+7.6%	411.7	25.3x	1.8x
INTRACO	42.5	+7.9%	339.4	40.7x	3.6x	EBL	23,659	1.3%	7.5x	1.0x	INTRACO	42.5	+7.9%	339.4	40.7x	3.6x

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)
ORIONPHARM	135.1	-9.7%	1,791.9	32.9x	1.6x	ORIONPHARM	21,503	1.2%	32.9x	1.6x	INTRACO	39.0	37.6	8.0	2,124	82.19
JHRML	120.7	-8.2%	584.2	40.8x	4x	PUBALIBANK	19,652	1.1%	5.8x	0.7x	BDCOM	54.0	50.0	13.0	1,508	76.61
SPCL	93.1	-7.6%	419.7	12.4x	2.4x	NBL	19,116	1.1%	NM	0.5x	ORIONPHARM	164.0	135.0	12.0	492	74.24
BDTHAIFOOD	47.8	-7.5%	88.1	65.6x	3.3x	CITYBANK	18,423	1.0%	4.8x	0.7x	CITYBANK	23.5	23.5	2.0	2,940	69.09
ILFSL	6.2	-7.5%	15.3	NM	NM	ROBI	15,714	0.9%	NM	2.4x	SEAPEARL	135.0	113.2	20.0	463	54.27
BPML	83.5	-7.1%	263.7	30.8x	1.8x	OLYMPIC	15,645	0.9%	17.6x	2.8x	SQRUPHARMA	209.8	209.8	2.0	70	14.63
KOHINOOR	599.9	-7.0%	47.4	54.6x	10.6x	BSRMLTD	14,994	0.9%	5.2x	0.7x	ORIONINFU	580.0	580.0	1.0	20	11.60
BSC	158.0	-6.5%	620.7	11.7x	2.3x	ALARABANK	14,609	0.8%	12.0x	1.1x	NEWLINE	45.1	45.1	1.0	240	10.82
MIRAKHTER	61.2	-6.4%	74.1	22.9x	1.3x	IFIC	13,860	0.8%	12.1x	0.7x	SALVOCHEM	64.0	61.8	4.0	151	9.33
BEACONPHAR	314.7	-6.2%	87.3	77.7x	12.5x						METROSPIN	47.7	42.0	6.0	199	8.91

*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
INTRACO	39.0	37.6	82.2	2,124	8
BDCOM	54.0	50.0	76.6	1,508	13
ORIONPHARM	164.0	135.0	74.2	492	12
CITYBANK	23.5	23.5	69.1	2,940	2
SEAPEARL	135.0	113.2	54.3	463	20
SQURPHARMA	209.8	209.8	14.6	70	2
ORIONINFU	580.0	580.0	11.6	20	1
NEWLINE	45.1	45.1	10.8	240	1
SALVOCHEM	64.0	61.8	9.3	151	4
METROSPIN	47.7	42.0	8.9	199	6
BATBC	523.0	518.7	7.4	14	3
RDFOOD	45.5	45.5	6.8	150	1
AL-HAJTEX	133.0	133.0	6.6	50	3
SUNLIFEINS	62.6	62.6	6.3	100	1
SALAMCRST	38.5	38.1	6.1	160	2
SONALIPAPR	630.0	630.0	5.0	8	1
SAIHAMTEX	26.0	25.0	5.0	197	3
HRTEX	127.6	127.5	5.0	39	3
PENINSULA	38.5	38.5	4.9	126	2
EHL	94.0	90.1	3.6	39	2
BPML	89.5	88.0	3.5	39	3
NLTUBES	79.6	79.6	3.4	43	2
Total			504.3		128

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Pragati Life Insurance Ltd.	-	6.0%	0.0%	Record Date	26-Sep-22
The IBN SINA Pharmaceutical Industry Ltd.	-	0.0%	60.0%	Record Date	29-Sep-22
Apex Tannery Limited	-	0.0%	10.0%	Record Date	3-Oct-22
Bay Leasing & Investment Limited	-	5.0%	0.0%	Record Date	6-Oct-22
Summit Power Limited	-	0.0%	20.0%	Record Date	6-Oct-22
Eastern Housing Limited	-	0.0%	20.0%	Record Date	12-Oct-22
Phoenix Finance and Investments Ltd.	-	0.0%	0.0%	Record Date	13-Oct-22
ADN Telecom Limited	-	0.0%	10.0%	Record Date	13-Oct-22
Bangladesh Industrial Fin. Co. Ltd.	-	0.0%	0.0%	Record Date	20-Oct-22
Meghna Insurance Company Limited	-	0.0%	3.0%	Record Date	24-Oct-22

Important DSE News
MEGHNALIFE

(Q1 Un-audited): Net Operating Cash Flow (NOCFPS) was Tk. (10.18) for January-March 2022. The Company also informed that quarterly Net Asset Value (NAV), Earning per share (EPS) could not be calculated as the Actuarial Valuation of Life Insurance Company is done annually.

(Q2 Un-audited): Net operating cash flow per share (NOCFPS) was Tk. (25.81) for January-June 2022. The Company also informed that quarterly Net Asset Value (NAV), Earning per share (EPS) could not be calculated as the Actuarial Valuation of Life Insurance Company is done annually.

PUBALIBANK

Trouser Line Limited (where Mrs. Rana Laila Hafiz is the Director of Pubali Bank Ltd. and Managing Director of Trouser Line Limited), has further informed that it has completed its buying of 20,00,000 shares of the Company at prevailing market price through DSE (19,44,464 shares) and CSE (55,536 shares).

PRAGATILIF

Mr. Mabroor Hossain, one of the Sponsors of the Company, has expressed his intention to sell 3,72,000 shares out of his holding of 9,97,802 whereas Mr. A.S.M. Mohiuddin Monem, Sponsor Director, Mr. Tabith M. Awal, Sponsor Director, Mr. Md. Shafiur Rahman, Sponsor Director and Mr. Salim Rahman, Sponsor of the company have expressed their intentions to buy 50,000, 74,400, 50,000 and 1,97,600 shares respectively at prevailing market price (in the Block Market) through DSE and CSE within next 30 working days.

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