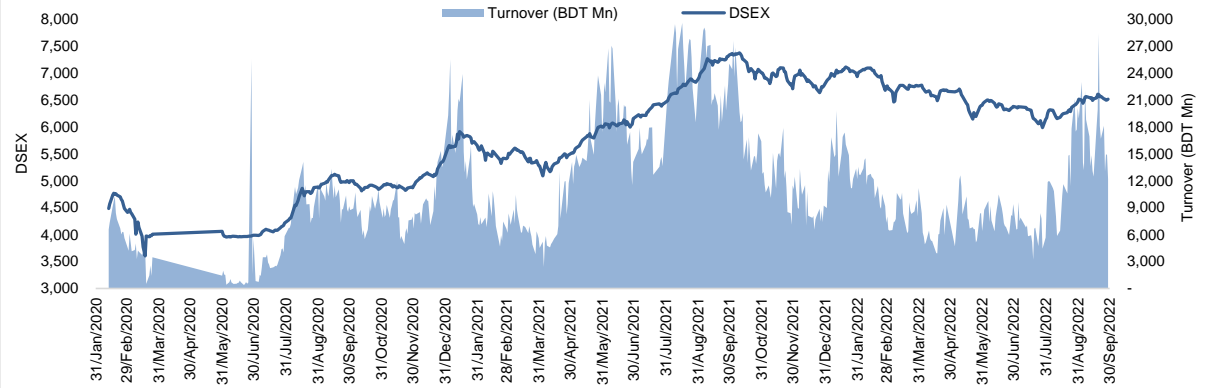


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.25%) gained 16.5 points and closed at 6,512.89. The blue-chip index DS30 (+0.31%), the Shariah-based index DSES (+0.31%), and the large-cap index CDSET (+0.12%) closed at 2,330.42, 1,419.73, and 1,269.15 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.56% followed by NBFi (+0.36%), Food & Allied (+0.18%), Bank (+0.15%), Engineering (+0.12%), Telecommunication (+0.02%), and Fuel & Power (-0.33%), respectively. Block trades contributed 0.9% of the overall market turnover. Bangladesh Export Import Company Ltd. (-1.4%) was the most traded share with a turnover of BDT 1,107 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,512.89	6,496.39	+16.50	+0.25%	-3.6%
DS30	2,330.42	2,323.13	+7.28	+0.31%	-8.0%
DSES	1,419.73	1,415.41	+4.32	+0.31%	-0.8%
CDSET	1,269.15	1,267.67	+1.48	+0.12%	-6.6%

	Advanced	Declined	Unchanged	Total
All Category	94	85	186	365
A Category (Equity)	65	60	124	249
B Category (Equity)	23	23	47	93
N Category (Equity)	3	0	3	6
Z Category (Equity)	3	2	12	17
Mutual Funds	0	0	29	29
Corporate Bonds	0	0	2	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,199,140	5,191,677	+0.1%
	Mn USD	49,913	49,841	
Turnover	Mn BDT	12,170	14,845	
	Mn USD	117	143	-18.0%
Volume	Mn Shares	203	224	-9.4%
	Mn Shares	190,513	206,268	-7.6%

* Average Interbank Exchange Rate is BDT 104.17 as of Sep 28, 2022

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Figure: Sectorial Turnover (BDT Mn)

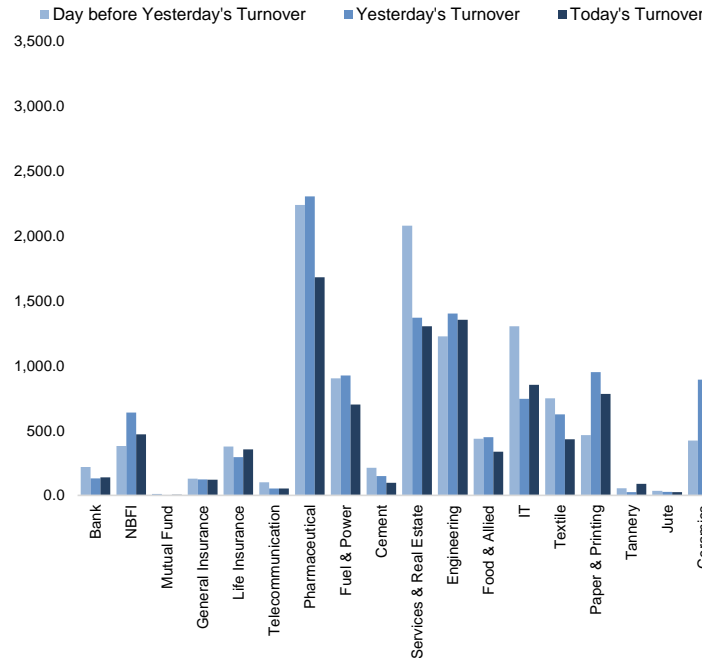
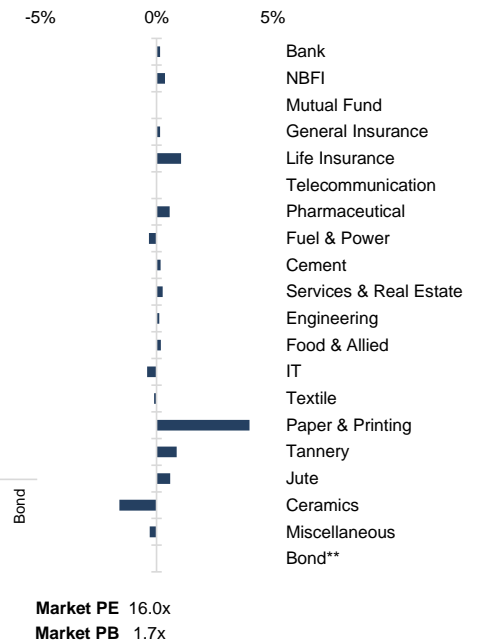


Figure: Sectorial Mcap Change



Market PE 16.0x
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	1,444	1,441	+2.13	+0.15%	33	665,531	14.5%	139.2	1.2%	7.8x	0.8x	GP	386,996	8.4%	19.8	11.4x	7.7x
NBFI	2,021	2,014	+7.22	+0.36%	23	197,156	4.3%	470.7	4.2%	NM	3.9x	WALTONHIL	317,378	6.9%	0.1	26.1x	3.1x
Mutual Fund	854	854	-	-	36	37,622	0.8%	4.8	0.0%	NM	0.8x	BATBC	280,098	6.1%	23.0	18.1x	7.4x
General Insurance	3,156	3,151	+4.76	+0.15%	41	91,534	2.0%	119.7	1.1%	14.8x	1.5x	SQURPHARMA	185,977	4.0%	38.8	10.0x	1.9x
Life Insurance	2,488	2,462	+26.03	+1.06%	13	69,342	1.5%	354.5	3.1%	NM	NM	ROBI	157,138	3.4%	1.4	NM	2.4x
Telecommunication	4,956	4,955	+1.12	+0.02%	3	581,436	12.6%	53.7	0.5%	15.5x	4.6x	RENATA	139,694	3.0%	3.2	25.2x	4.9x
Pharmaceutical	3,941	3,919	+21.92	+0.56%	32	752,286	16.4%	1,678.7	14.9%	18.5x	2.7x	UPGDCL	136,402	3.0%	4.9	11.0x	4.2x
Fuel & Power	1,732	1,738	-5.65	-0.33%	23	456,778	9.9%	700.2	6.2%	11.5x	1.2x	BEXIMCO	116,726	2.5%	1,107.2	8.1x	1.5x
Cement	2,586	2,582	+4.62	+0.18%	7	124,218	2.7%	97.5	0.9%	27.0x	2.7x	LHBL	87,451	1.9%	88.3	22.4x	4.9x
Services & Real Estate	1,929	1,924	+5.10	+0.26%	8	76,224	1.7%	1,301.3	11.5%	94.4x	1.5x	BERGERPBL	80,702	1.8%	1.2	26.2x	7.0x
Engineering	4,583	4,578	+5.49	+0.12%	42	537,998	11.7%	1,351.5	12.0%	20.3x	1.9x	MARICO	76,567	1.7%	5.3	21.9x	33.3x
Food & Allied	21,383	21,344	+38.79	+0.18%	21	381,016	8.3%	336.8	3.0%	22.9x	8.0x	ICB	76,552	1.7%	4.5	43.3x	1.7x
IT	2,924	2,936	-12.05	-0.41%	11	38,126	0.8%	850.7	7.5%	31.0x	2.7x	BXPHARMA	75,884	1.7%	65.5	13.2x	1.9x
Textile	1,677	1,679	-1.75	-0.10%	58	176,396	3.8%	432.3	3.8%	26.5x	1.1x	BEACONPHAR	72,927	1.6%	27.3	78.0x	12.5x
Paper & Printing	11,432	10,992	+439.51	+4.00%	6	44,045	1.0%	780.6	6.9%	NM	3.0x	BRACBANK	57,619	1.3%	0.4	11.3x	1.0x
Tannery	3,147	3,120	+27.01	+0.87%	6	33,884	0.7%	88.9	0.8%	35.8x	3.3x	ISLAMIBANK	52,969	1.2%	1.1	10.9x	0.8x
Jute	10,535	10,474	+60.90	+0.58%	3	2,577	0.1%	25.0	0.2%	NM	36.4x	DUTCHBANGL	44,041	1.0%	2.2	7.6x	1.1x
Ceramics	745	758	-12.09	-1.60%	5	34,478	0.7%	487.2	4.3%	32.3x	2.1x	TITASGAS	40,459	0.9%	21.0	12.1x	0.6x
Miscellaneous	4,681	4,695	-13.77	-0.29%	15	262,584	5.7%	2,009.5	17.8%	12.8x	2.2x	POWERGRID	37,775	0.8%	32.0	10.3x	0.4x
Bond**	90	90	-	-	9	37,131	0.8%	0.4	0.0%	NM	NM	BSCCL	37,302	0.8%	32.5	16.2x	3.3x

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	230.0	+19.2%	250.1	42.2x	5.1x	SQURPHARMA	121,685	6.9%	10.0x	1.9x	BEXIMCO	133.2	-1.4%	1,107.2	8.1x	1.5x
EHL	116.6	+7.8%	665.3	19.8x	1.6x	BEXIMCO	81,066	4.6%	8.1x	1.5x	ORIONPHARM	138.7	+2.5%	991.0	33.8x	1.7x
APEXFOOT	304.1	+7.4%	70.9	27.3x	1.2x	BATBC	74,086	4.2%	18.1x	7.4x	EHL	116.6	+7.8%	665.3	19.8x	1.6x
IDLC	50.9	+7.2%	56.2	10.6x	1.2x	RENATA	68,199	3.9%	25.2x	4.9x	BBS	30.8	+6.6%	415.5	27.6x	2.0x
KOHINOOR	610.1	+6.8%	45.8	55.5x	10.7x	BXPHARMA	52,982	3.0%	13.2x	1.9x	SPCERAMICS	55.7	-2.6%	387.2	NM	1.7x
BBS	30.8	+6.6%	415.5	27.6x	2.0x	BEACONPHAR	51,049	2.9%	78.0x	12.5x	JHRML	133.9	+2.1%	355.6	45.2x	4.4x
DAFODILCOM	70.1	+6.5%	8.5	94.7x	5x	GP	38,700	2.2%	11.4x	7.7x	BDCOM	61.3	-7.3%	289.5	40.9x	4.0x
KEYACOSMET	7.2	+5.9%	128.0	NM	0.6x	BRACBANK	30,976	1.8%	11.3x	1.0x	MONOSPOOL	230.0	+19.2%	250.1	42.2x	5.1x
KAY&QUE	284.1	+5.6%	30.0	NM	3.7x	LHBL	30,888	1.8%	22.4x	4.9x	BPML	88.0	+4.6%	249.8	32.5x	1.9x
AMANFEED	38.1	+5.0%	53.4	15.7x	1.1x	ISLAMIBANK	23,794	1.4%	10.9x	0.8x	ADNTEL	84.8	+2.3%	245.9	32.7x	3.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BDCOM	61.3	-7.3%	289.5	40.9x	4.0x	BDCOM	69.0	59.5	8.0	3,211	205.28
PADMALIFE	46.6	-5.5%	12.9	NM	NM	SONALIPAPR	700.0	680.0	3.0	149	104.06
IPDC	66.5	-4.5%	234.2	27.0x	3.9x	INTRACO	46.8	38.8	7.0	2,488	100.83
MONNOAGML	542.4	-3.9%	10.8	NM	35.9x	FORTUNE	81.1	80.9	6.0	1,232	99.89
LOVELLO	42.4	-3.4%	80.4	21.7x	3.4x	RENATA	1,325.0	1,325.0	1.0	60	79.10
EPGL	35.5	-3.3%	22.8	25.5x	0.6x	IPDC	75.5	68.5	2.0	1,064	72.98
ILFSL	6.0	-3.2%	6.4	NM	NM	METROSPIN	46.0	45.0	5.0	944	42.60
LRBDL	36.7	-3.2%	18.3	15.6x	1.0x	ORIONINFU	603.7	525.0	4.0	54	29.50
ECABLES	194.7	-3.1%	33.7	NM	23.5x	AL-HAJTEX	139.4	134.0	9.0	186	25.35
MIRAKHTER	61.0	-3.0%	41.8	22.9x	1.3x	PRIMEINSUR	91.0	82.8	5.0	250	21.52

*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
BDCOM	69.0	59.5	205.3	3,211	8
SONALIPAPR	700.0	680.0	104.1	149	3
INTRACO	46.8	38.8	100.8	2,488	7
FORTUNE	81.1	80.9	99.9	1,232	6
RENATA	1,325.0	1,325.0	79.1	60	1
IPDC	75.5	68.5	73.0	1,064	2
METROSPIN	46.0	45.0	42.6	944	5
ORIONINFU	603.7	525.0	29.5	54	4
AL-HAJTEX	139.4	134.0	25.3	186	9
PRIMEINSUR	91.0	82.8	21.5	250	5
MARICO	2,450.0	2,450.0	19.6	8	9
SEAPEARL	139.5	122.0	17.5	142	9
BEACONPHAR	314.0	283.0	11.4	39	2
SPCL	101.4	96.0	8.8	88	3
ORIONPHARM	141.0	122.9	6.9	49	3
KDSALTD	84.1	84.1	5.6	66	1
EHL	115.0	106.0	4.8	42	3
NAHEEACP	78.4	78.4	3.1	40	1
UNIQUEHRL	80.0	79.9	2.2	28	2
BEXGSUKUK	88.0	88.0	1.8	20	1
FAREASTLIF	104.6	102.1	1.7	17	2
RUNNERAUTO	53.9	53.9	1.7	31	1
Total			886.2		112

Important DSE News
MONOSPOOL

The Board of Directors has recommended 10% cash and 10% stock dividend for the year ended June 30, 2022. Date of AGM: 07.11.2022, Time: 11:00 AM, Venue: Digital Platform. Record Date: 24.10.2022 for entitlement of cash dividend and another record date for entitlement of Stock Dividend will be notified later after getting approval from BSEC. The Company has also reported EPS of Tk. 5.45, NAV per share of Tk. 44.88 and NOCFPS of Tk. 7.19 for the year ended June 30, 2022 as against Tk. 1.23, Tk. 40.43 and Tk. 4.30 respectively for the same period of the previous year.

PAPERPROC

The Board of Directors has recommended 8% cash and 7% stock dividend for the year ended June 30, 2022. Date of AGM: 08.11.2022, Time: 11:00 AM, Venue: Digital Platform. Record Date: 24.10.2022 for entitlement of cash dividend and another record date for entitlement of Stock Dividend will be notified later after getting approval from BSEC. The Company has also reported EPS of Tk. 4.62, NAV per share of Tk. 31.59 and NOCFPS of Tk. 0.95 for the year ended June 30, 2022 as against Tk. 1.34, Tk. 27.97 and Tk. 2.76 respectively for the same period of the previous year.

MTB

Associated Builders Corporation Ltd., one of the Sponsors of the Company, has further informed that it has completed its sale of 53,17,500 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 26.09.2022.

NRBCBANK

Refer to their earlier news disseminated by DSE on 25.05.2022 regarding decision to issue Non-Convertible Unsecured Subordinated Bond-II, the Company further informed that Bangladesh Securities and Exchange Commission has given consent to issue Non-Convertible, Unsecured, Fully-redeemable, Floating Rate Subordinated Bond of BDT 500.00 Crore through private placement to strengthen the capital base of the Company.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Bangladesh Monospool Paper Manufacturing Co. Limited	-	10.0%	10.0%	Record Date	24-Oct-22
Paper Processing & Packaging Limited	-	7.0%	8.0%	Record Date	24-Oct-22
Doreen Power Generations and Systems Limited	-	12.0%	18.0%	Record Date	6-Nov-22

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