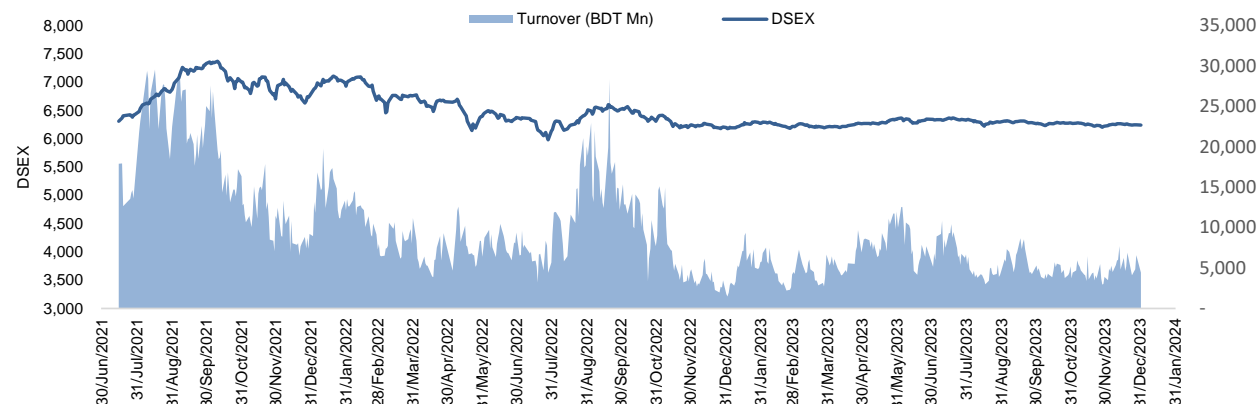


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.06%) lost 3.62 points and closed at 6,242.87. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (-0.21%), and the large-cap index CDSET (-0.08%) closed at 2,091.54, 1,361.24, and 1,201.85 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.20% followed by Food & Allied (-0.13%), Engineering (-0.10%), NBFi (-0.05%), Bank (-0.02%), Telecommunication (0.00%), and Fuel & Power (+0.01%), respectively. Block trades contributed 7.0% of the overall market turnover. Bd.Thai Aluminium Ltd. (+9.7%) was the most traded share with a turnover of BDT 226 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,242.87	6,246.50	-3.62	-0.06%	-0.1%
DS30	2,091.54	2,093.83	-2.29	-0.11%	-0.1%
DSES	1,361.24	1,364.13	-2.90	-0.21%	-0.2%
CDSET	1,201.85	1,202.82	-0.97	-0.08%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	80	86	168	334
A Category (Equity)	63	39	110	212
B Category (Equity)	13	41	49	103
N Category (Equity)	1	0	1	2
Z Category (Equity)	3	6	8	17
Mutual Funds	16	3	18	37
Corporate Bonds	0	0	4	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,808,234	7,808,496	
	Mn USD	70,984	70,986	-0.0%
Turnover	Mn BDT	4,438	6,606	-32.8%
	Mn USD	40	60	
Volume	Mn Shares	156	222	-29.7%
No. of Trade		131,913	161,379	-18.3%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 01, 2024

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Figure: Sectorial Turnover (BDT Mn)

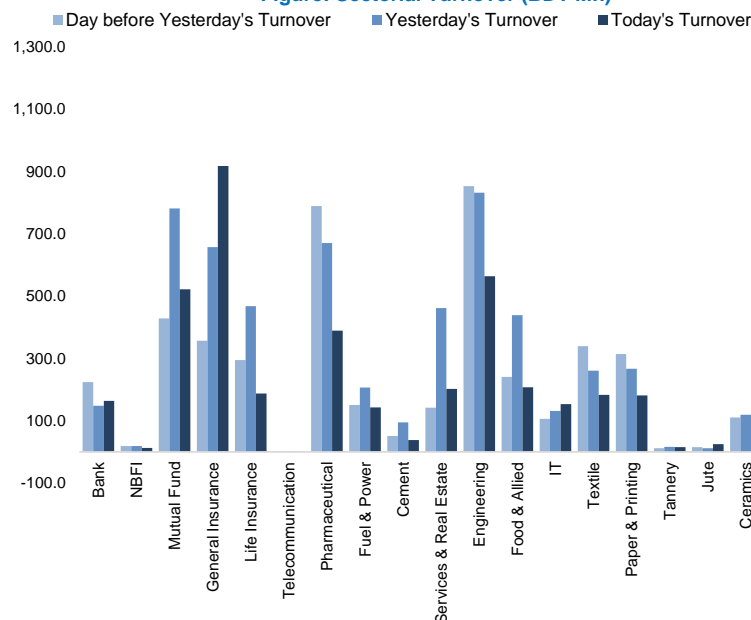
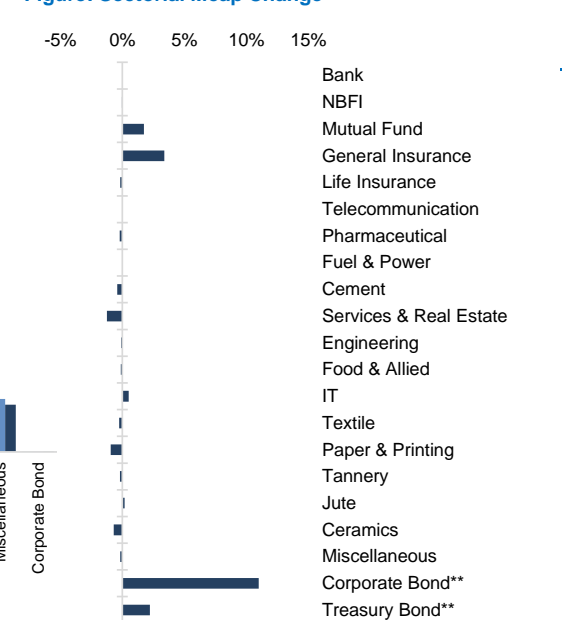


Figure: Sectorial Mcap Change



Market PE 19.4x

Market PB 1.6x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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	1,455	1,455	-0.35	-0.02%	35	686,347	8.8%	163.5	4.0%	12.5x	0.7x	GP	386,996	8.6%	0.4	12.5x	6.4x
NBFI	1,902	1,903	-0.86	-0.05%	23	185,051	2.4%	12.5	0.3%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	892	877	+15.23	+1.74%	37	42,194	0.5%	522.2	12.6%	NM	0.8x	BATBC	280,098	6.2%	0.4	15.4x	5.7x
General Insurance	3,607	3,489	+118.16	+3.39%	42	105,404	1.4%	917.7	22.2%	19.6x	1.7x	SQRPHARMA	185,977	4.1%	27.2	9.5x	1.5x
Life Insurance	2,633	2,638	-4.34	-0.16%	15	73,607	0.9%	187.0	4.5%	NM	NM	ROBI	157,138	3.5%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.6	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,725	3,733	-7.59	-0.20%	33	720,014	9.2%	389.2	9.4%	19.6x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,692	1,692	+0.16	+0.01%	23	446,291	5.7%	142.5	3.5%	44.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,513	2,523	-10.23	-0.41%	7	120,803	1.6%	38.4	0.9%	17.1x	2.6x	BERGERPBL	82,019	1.8%	1.4	26.6x	6.5x
Services & Real Estate	1,500	1,519	-18.93	-1.25%	8	59,248	0.8%	202.6	4.9%	19.5x	0.8x	LHBL	80,483	1.8%	25.2	12.7x	3.8x
Engineering	4,516	4,520	-4.46	-0.10%	42	530,380	6.8%	564.1	13.7%	27.0x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,153	21,181	-27.52	-0.13%	21	391,416	5.0%	207.3	5.0%	19.7x	6.9x	BXPHARMA	65,222	1.4%	0.1	13.8x	1.4x
IT	2,910	2,895	+14.92	+0.52%	11	37,935	0.5%	153.6	3.7%	30.0x	2.5x	BRACBANK	57,596	1.3%	0.5	7.7x	0.9x
Textile	1,654	1,658	-4.41	-0.27%	58	171,269	2.2%	183.0	4.4%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.2	86.9x	9.0x
Paper & Printing	9,999	10,094	-94.28	-0.93%	6	38,527	0.5%	181.7	4.4%	58.2x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,098	3,104	-5.87	-0.19%	6	35,075	0.5%	15.2	0.4%	57.7x	3.2x	DUTCHBANGL	44,203	1.0%	0.1	8.0x	1.0x
Jute	17,715	17,684	+31.73	+0.18%	3	4,271	0.1%	25.3	0.6%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	690	695	-4.77	-0.69%	5	31,903	0.4%	70.5	1.7%	53.2x	1.9x	UNILEVERCL	39,088	0.9%	1.0	39.5x	18.9x
Miscellaneous	4,258	4,265	-7.28	-0.17%	14	231,840	3.0%	151.7	3.7%	26.5x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	5,023	4,525	+498.12	+11.01%	13	45,374	0.6%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	86	+1.91	+2.22%	242	3,256,507	41.8%	0.0	0.0%	NM	NM						

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
IFILISLMF1	7.7	+10.0%	17.6	NM	1.2x	SQRPHARMA	121,499	7.0%	9.5x	1.5x	BDTHAI	30.6	+9.7%	225.8	NM	1.1x
CRYSTALINS	93.6	+10.0%	60.8	30.6x	3.7x	BATBC	74,086	4.3%	15.4x	5.7x	KPPL	27.5	-8.0%	157.9	NM	NM
BDTHAI	30.6	+9.7%	225.8	NM	1.1x	BEXIMCO	69,196	4.0%	34.2x	1.2x	SEAPEARL	96.4	-3.3%	155.4	15.6x	5.2x
EASTERNINS	74.4	+9.6%	124.4	26.5x	1.4x	RENATA	68,042	3.9%	66.1x	4.4x	OAL	16.7	-9.2%	133.1	NM	1.5x
ICB3RDNRB	7.3	+9.0%	14.3	NM	1.3x	BXPHARMA	45,564	2.6%	13.8x	1.4x	INTRACO	41.3	+2.0%	127.3	37.5x	3.3x
ICBEPMF1S1	8.6	+8.9%	18.0	NM	1.6x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	EASTERNINS	74.4	+9.6%	124.4	26.5x	1.4x
RUPALIINS	29.6	+8.8%	47.5	47.7x	1x	GP	38,700	2.2%	12.5x	6.4x	CENTRALPHL	19.4	-4.0%	113.9	NM	3.5x
GLDNJMF	16.2	+8.7%	87.1	NM	1.6x	BRACBANK	30,964	1.8%	7.7x	0.9x	EIL	38.3	+1.3%	99.5	33.0x	2.1x
PRIME1ICBA	10.1	+8.6%	98.6	NM	1.7x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	PRIME1ICBA	10.1	+8.6%	98.6	NM	1.7x
REPUBLIC	43.4	+8.0%	43.3	21.7x	2.4x	LHBL	28,562	1.6%	12.7x	3.8x	ORIONINFU	348.8	-3.5%	98.3	NM	23.3x

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)
IMAMBUTTON	154.6	-9.9%	2.9	NM	56.4x	IPDC	51.9	51.9	7.0	1,668	86.58
AFTABAUTO	27.2	-9.3%	36.8	NM	1x	BEACONPHAR	245.0	225.1	2.0	165	40.44
OAL	16.7	-9.2%	133.1	NM	1.5x	ACMEPL	35.4	31.9	10.0	589	19.52
PDL	13.0	-8.5%	69.9	NM	1.0x	EMERALDOIL	80.5	66.0	6.0	189	13.40
KPPL	27.5	-8.0%	157.9	NM	NM	ORIONPHARM	71.7	71.7	3.0	173	12.42
STANCERAM	137.5	-7.7%	16.8	NM	NM	AL-HAJTEX	132.0	132.0	8.0	93	12.23
ETL	11.8	-7.1%	44.6	25.7x	0.9x	1STPRIMFMF	33.0	32.8	5.0	324	10.67
LIBRAINFU	856.1	-7.0%	20.7	NM	1.0x	JAMUNABANK	20.9	20.9	1.0	400	8.36
AZIZPIPES	112.8	-6.8%	19.8	NM	NM	IFILISLMF1	7.7	7.7	4.0	976	7.52
GEMINISEA	331.1	-6.3%	31.4	51.5x	22.2x	SONALIANS	612.0	560.0	6.0	10	5.91

* 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.

Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
IPDC	51.9	51.9	86.6	1,668	7
BEACONPHAR	245.0	225.1	40.4	165	2
ACMEPL	35.4	31.9	19.5	589	10
EMERALDOIL	80.5	66.0	13.4	189	6
ORIONPHARM	71.7	71.7	12.4	173	3
AL-HAJTEX	132.0	132.0	12.2	93	8
1STPRIMFMF	33.0	32.8	10.7	324	5
JAMUNABANK	20.9	20.9	8.4	400	1
IFILISLMF1	7.7	7.7	7.5	976	4
SONALIANS	612.0	560.0	5.9	10	6
EASTERNINS	72.0	70.0	5.5	78	2
IFIC	11.3	10.1	5.4	503	3
GQBALLPEN	135.0	130.0	5.1	38	3
SONALIPAPR	660.0	571.5	5.0	8	3
NAVANAPHAR	76.2	76.2	4.4	58	1
ISLAMIINS	46.0	46.0	4.1	88	1
DELTALIFE	143.0	125.0	3.7	27	3
POWERGRID	47.2	47.2	3.6	77	3
CRYSTALINS	90.0	90.0	3.4	38	1
EIL	38.0	37.8	3.3	88	2
BRACBANK	33.5	33.3	3.2	96	3
SEAPPEARL	105.0	98.0	3.0	30	4
Total			309.4		132

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News

AFTABAUTO

Q1 Financials

Consolidated EPS was Tk. (0.65) for July-September 2023 as against Tk. 0.01 for July-September 2022; Consolidated NOCFPS was Tk. 0.57 for July-September 2023 as against Tk. 0.28 for July-September 2022. Consolidated NAV per share was Tk. 51.11 as on September 30, 2023 and Tk. 51.76 as on June 30, 2023. Reasons for deviation in EPS: EPS has decreased due to notably influenced by two key factors: chassis model changes and the persisting challenges associated with the Dollar crisis affecting the opening of Letters of Credit (LC).

TILIL

The Company will be placed in 'B' category from existing 'N' category with effect from January 02, 2024 as the Company has reported disbursement of 2% Interim Cash Dividend based on 6 months financials for the period ended June 30, 2023.

EPGL

The Company will be placed in 'B' category from existing 'A' category with effect from January 02, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2023.

QUEENSOUTH

The Company will be placed in 'B' category from existing 'A' category with effect from January 02, 2024 as the Company has approved 6% Cash Dividend for the year ended June 30, 2023.

SSSTEEL

The Company will be placed in 'B' category from existing 'A' category with effect from January 02, 2024 as the Company has approved 2% Cash Dividend for the year ended June 30, 2023.

FORTUNE

The Company will be placed in 'B' category from existing 'A' category with effect from January 02, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2023.

VFSTDL

The Company will be placed in 'B' category from existing 'A' category with effect from January 02, 2024 as the Company has approved 2% Cash Dividend for the year ended June 30, 2023.

SALVOCHEM

The Company will be placed in 'B' category from existing 'A' category with effect from January 02, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2023.

WALTONHIL

Mr. S.M. Ashraful Alam, one of the Sponsor Directors of the company, has further informed that he has completed his sale of 1,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 25.08.2022.

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