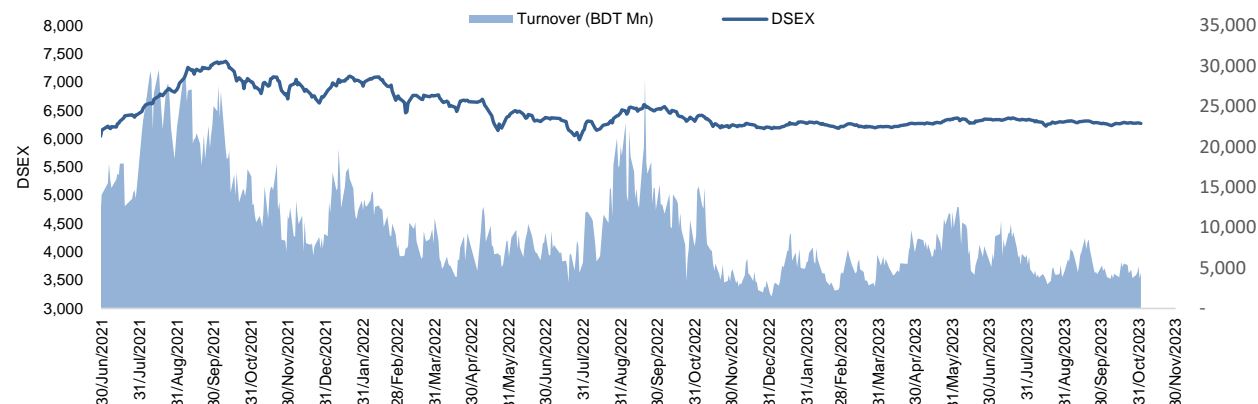


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.09%) lost 5.82 points and closed at 6,267.90. The blue-chip index DS30 (-0.01%), the Shariah-based index DSES (-0.09%), and the large-cap index CDSET (-0.04%) closed at 2,133.74, 1,359.18, and 1,214.41 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.06%. Pharmaceutical experienced the highest loss of 0.2% followed by Bank (-0.09%), Engineering (-0.05%), Fuel & Power (0.00%). Block trades contributed 5.7% of the overall market turnover. Fu Wang Food Ltd. (+7.2%) was the most traded share with a turnover of BDT 458 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,267.90	6,273.72	-5.82	-0.09%	+1.0%
DS30	2,133.74	2,133.98	-0.24	-0.01%	-2.8%
DSES	1,359.18	1,360.42	-1.24	-0.09%	+0.0%
CDSET	1,214.41	1,214.94	-0.53	-0.04%	-0.0%

	Advanced	Declined	Unchanged	Total
All Category	56	84	173	313
A Category (Equity)	32	59	115	206
B Category (Equity)	20	22	43	85
N Category (Equity)	0	1	0	1
Z Category (Equity)	4	2	15	21
Mutual Funds	0	3	21	24
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,845,286	7,848,803	-0.0%
	Mn USD	70,678	70,710	
Turnover	Mn BDT	4,431	3,723	+19.0%
	Mn USD	40	34	
Volume	Mn Shares	79	59	+34.1%
No. of Trade		127,011	114,720	+10.7%

* Average Interbank Exchange Rate is BDT 111.00 as of Nov 02, 2023

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Figure: Sectorial Turnover (BDT Mn)

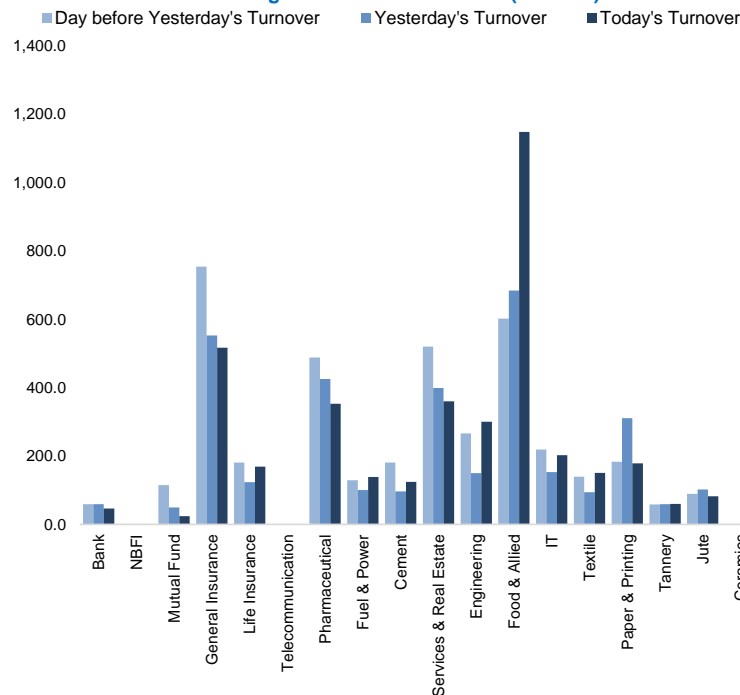
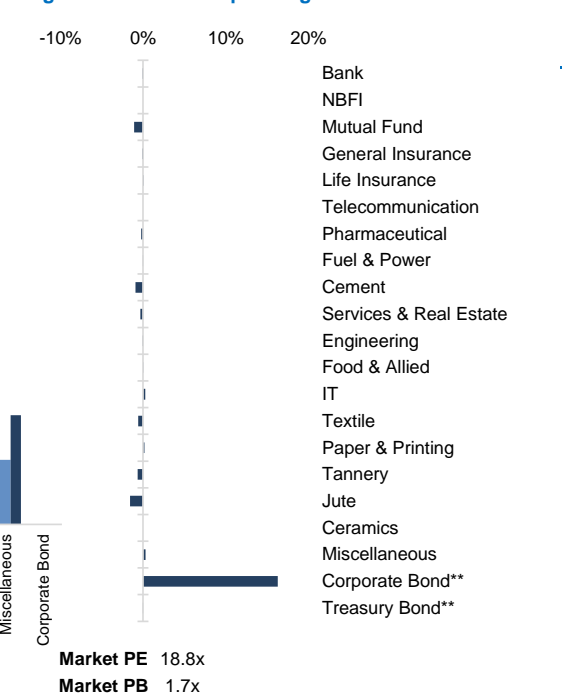


Figure: Sectorial Mcap Change



Market PE 18.8x

Market PB 1.7x

* 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	1,449	1,450	-1.23	-0.09%	35	683,584	8.7%	46.7	1.1%	12.5x	0.7x	GP	386,996	8.5%	0.1	12.5x	6.4x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.9	0.0%	NM	25.3x	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	860	869	-9.44	-1.09%	37	40,678	0.5%	24.0	0.6%	NM	0.8x	BATBC	280,098	6.2%	0.2	15.4x	5.7x
General Insurance	3,636	3,641	-4.22	-0.12%	42	106,078	1.4%	517.1	12.4%	19.7x	1.7x	SQURPHARMA	187,218	4.1%	27.5	9.9x	1.6x
Life Insurance	2,626	2,623	+2.52	+0.10%	15	73,393	0.9%	169.1	4.0%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.2	0.0%	15.9x	4.2x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,733	3,741	-7.61	-0.20%	33	723,396	9.2%	352.9	8.4%	20.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.9x	4.4x
Fuel & Power	1,700	1,700	-0.03	-0.00%	23	448,309	5.7%	138.5	3.3%	34.3x	1.1x	BEXIMCO	103,571	2.3%	0.0	14.6x	1.2x
Cement	2,526	2,549	-23.28	-0.91%	7	121,318	1.5%	124.6	3.0%	20.5x	2.6x	BERGERPBL	82,335	1.8%	1.0	26.7x	6.5x
Services & Real Esta	1,872	1,878	-6.18	-0.33%	8	73,950	0.9%	360.4	8.6%	23.2x	1.2x	LHBL	81,761	1.8%	90.2	12.9x	3.8x
Engineering	4,487	4,489	-2.38	-0.05%	42	526,959	6.7%	300.7	7.2%	33.3x	1.9x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,522	21,509	+12.28	+0.06%	21	398,234	5.1%	1,148.1	27.5%	20.1x	7.1x	BXPHARMA	65,222	1.4%	0.0	14.1x	1.5x
IT	2,999	2,992	+7.85	+0.26%	11	39,104	0.5%	202.8	4.9%	27.7x	2.6x	BRACBANK	57,596	1.3%	0.6	7.7x	0.9x
Textile	1,656	1,665	-9.58	-0.58%	58	173,312	2.2%	150.4	3.6%	72.7x	1.2x	BEACONPHAR	56,595	1.2%	0.0	NM	9.5x
Paper & Printing	9,928	9,910	+18.20	+0.18%	6	38,253	0.5%	178.8	4.3%	58.3x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,109	3,129	-20.05	-0.64%	6	32,833	0.4%	60.2	1.4%	43.5x	3.1x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	19,043	19,348	-305.55	-1.58%	3	4,658	0.1%	81.9	2.0%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.0	0.0%	53.7x	1.9x	UNILEVERCL	39,106	0.9%	1.4	39.5x	18.9x
Miscellaneous	4,164	4,151	+13.00	+0.31%	14	226,702	2.9%	319.2	7.6%	17.7x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	296	255	+41.52	+16.31%	11	40,883	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	89	89	-0.00	-0.00%	242	3,282,008	41.9%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AZIZPIPES	101.6	+10.0%	28.1	NM	NM
KBPPWBIL	40.2	+9.8%	84.6	NM	3.4x
KPPL	11.7	+9.3%	42.5	NM	NM
FUWANGFOOD	34.1	+7.2%	458.3	NM	14.0x
MIRACLEIND	43.4	+6.4%	129.7	NM	2.6x
YPL	25.5	+6.3%	73.9	NM	4.8x
CENTRALPHL	12.1	+4.3%	14.1	NM	2x
GEMINISEA	759.2	+3.5%	106.5	49.1x	30.3x
DESHBANDHU	39.1	+3.4%	62.9	NM	2.1x
BENGALWTL	24.8	+3.3%	25.7	48.6x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONNOAGML	655.0	-22.8%	49.1	NM	3.8x
CAPITECGBF	20.8	-10.0%	5.4	NM	2x
RNSPIN	20.9	-9.9%	0.6	NM	1045.0x
FARCHEM	28.2	-9.9%	0.4	NM	2.6x
CAPMIBLMF	11.2	-9.7%	12.2	NM	1.2x
AMBEEPHA	989.6	-6.2%	36.2	NM	52.0x
SAMORITA	100.8	-5.6%	124.3	NM	1.8x
EMERALDOIL	131.1	-5.3%	354.6	66.2x	NM
PRAGATILIF	97.5	-4.8%	17.1	NM	NM
TOSRIFA	23.6	-4.5%	28.2	22.7x	0.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.9x	1.6x
BATBC	74,086	4.3%	15.4x	5.7x
BEXIMCO	69,196	4.0%	14.6x	1.2x
RENATA	68,042	3.9%	66.1x	4.4x
BXPHARMA	45,564	2.6%	14.1x	1.5x
BEACONPHAR	39,617	2.3%	NM	9.5x
GP	38,700	2.2%	12.5x	6.4x
BRACBANK	30,964	1.8%	7.7x	0.9x
ISLAMIBANK	29,927	1.7%	8.5x	0.7x
LHBL	28,562	1.6%	12.9x	3.8x
PUBALIBANK	19,162	1.1%	4.4x	0.6x
NBL	19,116	1.1%	NM	0.9x
CITYBANK	18,190	1.0%	5.2x	0.7x
OLYMPIC	16,066	0.9%	20.0x	3.1x
ROBI	15,714	0.9%	52.6x	2.4x
ALARABANK	14,357	0.8%	12.5x	1.1x
BSRMLTD	14,210	0.8%	9.2x	0.6x
SEAPEARL	13,733	0.8%	32.6x	10.9x
UPGDCL	13,547	0.8%	16.9x	4.4x
PRIMEBANK	13,491	0.8%	5.1x	0.7x

* 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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	34.1	+7.2%	458.3	NM	14.0x
EMERALDOIL	131.1	-5.3%	354.6	66.2x	NM
SEAPEARL	200.7	-1.0%	178.5	32.6x	10.9x
ORIONINFU	345.2	-4.1%	132.5	NM	25.1x
MIRACLEIND	43.4	+6.4%	129.7	NM	2.6x
SAMORITA	100.8	-5.6%	124.3	NM	1.8x
BEACHHATCH	51.3	+0.4%	113.8	48.4x	4.7x
GEMINISEA	759.2	+3.5%	106.5	49.1x	30.3x
LHBL	70.4	-0.4%	90.2	12.9x	3.8x
KBPPWBIL	40.2	+9.8%	84.6	NM	3.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EMERALDOIL	156.0	127.0	11.0	620	80.62
CNATEX	10.2	9.2	37.0	3,136	29.64
HRTEX	114.0	104.5	5.0	215	23.62
DOREENPWR	61.0	61.0	1.0	189	11.50
FINEFOODS	130.0	122.1	4.0	93	11.39
RENATA	1,150.0	1,141.8	4.0	9	10.41
SONALIPAPR	625.0	625.0	1.0	16	10.00
SEAPEARL	203.0	200.3	2.0	40	8.21
RAHIMAFOOD	219.0	217.0	6.0	28	6.09
BRACBANK	32.9	32.8	7.0	163	5.36

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EMERALDOIL	156.0	127.0	80.6	620	11
CNATEX	10.2	9.2	29.6	3,136	37
HRTEX	114.0	104.5	23.6	215	5
DOREENPWR	61.0	61.0	11.5	189	1
FINEFOODS	130.0	122.1	11.4	93	4
RENATA	1,150.0	1,141.8	10.4	9	4
SONALIPAPR	625.0	625.0	10.0	16	1
SEAPPEARL	203.0	200.3	8.2	40	2
RAHIMAFood	219.0	217.0	6.1	28	6
BRACBANK	32.9	32.8	5.4	163	7
NBL	8.1	8.1	4.1	500	5
SINGERBD	140.0	137.0	3.9	28	4
GENEXIL	68.0	68.0	3.0	44	1
PTL	80.0	69.3	2.9	39	4
NCCBANK	11.8	11.8	2.9	243	3
BEXIMCO	104.9	104.2	2.5	24	2
EGEN	45.1	40.7	2.5	57	2
PREMIERBAN	12.7	12.6	2.3	180	4
SONALIANS	660.0	660.0	2.0	3	3
LHBL	68.0	68.0	2.0	29	1
DULAMIACOT	71.0	71.0	1.9	26	1
AIL	81.0	80.5	1.6	20	2
Total			253.9		142

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
APEXTANRY		0.0%	5%	Record Date	7-Nov-23
MATINSPIIN		0.0%	40%	Record Date	7-Nov-23
BSC		0.0%	25%	Record Date	7-Nov-23
MIDASFIN		0.0%	2%	Record Date	7-Nov-23
EGEN		0.0%	10%	Record Date	8-Nov-23
BSRMSTEEL		0.0%	25%	Record Date	8-Nov-23
BSRMLTD		0.0%	25%	Record Date	8-Nov-23
PENINSULA		0.0%	0%	Record Date	9-Nov-23
DOREENPWR		0.0%	11%	Record Date	9-Nov-23
TILIL		0.0%	2%	Record Date	11-Nov-23
ISNLTD		0.0%	1%	Record Date	11-Nov-23
BDLAMP		0.0%	10%	Record Date	12-Nov-23
RNSPIN		0.0%	0%	Record Date	12-Nov-23
FARCHEM		0.0%	0%	Record Date	12-Nov-23
RENATA		0.0%	63%	Record Date	12-Nov-23
LIBRAINFU		50.0%	30%	Record Date	12-Nov-23
IMAMBUTTON		0.0%	0%	Record Date	13-Nov-23

Important DSE News
EMERALDOIL

The Board of Directors has recommended final 10% Cash dividend (including 5% interim cash dividend) except previous directors holding 29.92% shares for the year ended June 30, 2023. Date of AGM: 27.12.2023, Time of AGM: 11:00 AM, Venue: Digital Platform. Record Date: 29.11.2023. The Company has also reported EPS of Tk. 0.73, NAV per share of Tk. (10.37) and NOCFPS of Tk. (0.03) for the year ended June 30, 2023 as against Tk. 0.17, Tk. (12.85) and Tk. (2.40) respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. 1.47 for July-September 2023 as against Tk. 0.22 for July-September 2022. NOCFPS was Tk. (0.21) for July-September 2023 as against Tk. (0.77) for July-September 2022. NAV per share was Tk. (8.90) as on September 30, 2023 and Tk. (10.56) as on September 30, 2022. Reason for significant deviation: 100% Production capacity has been utilized during July-September 2023.

ANWARGALV

(Q1 Un-audited): EPS was Tk. 1.10 for July-September, 2023 as against Tk. 0.56 (Restated) for July-September, 2022. NOCFPS was Tk. 0.34 for July-September, 2023 as against Tk. 0.52 (Restated) for July-September, 2022. NAV per share was Tk. 14.07 as on September 30, 2023 and Tk. 12.98 as on June 30, 2023.

UNITEDFIN

The Company has informed that Mr. Mohammad Rafiqul Islam has been appointed for the position of Managing Director of the Company with effect from November 01, 2023.

SONALILIFE

The company has informed that the Board of Directors has elected Mr. Mostafa Golam Quddus as Chairman of the company.

BDTHAI

The company has informed that the Board of Directors has appointed Mr. Md. Abdul Bari, as acting Managing Director & Chief Executive Officer of the company. The Board has also appointed Mr. Sk. Ashiqur Rahman as acting Company Secretary of the company with effect from October 01, 2023.

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.