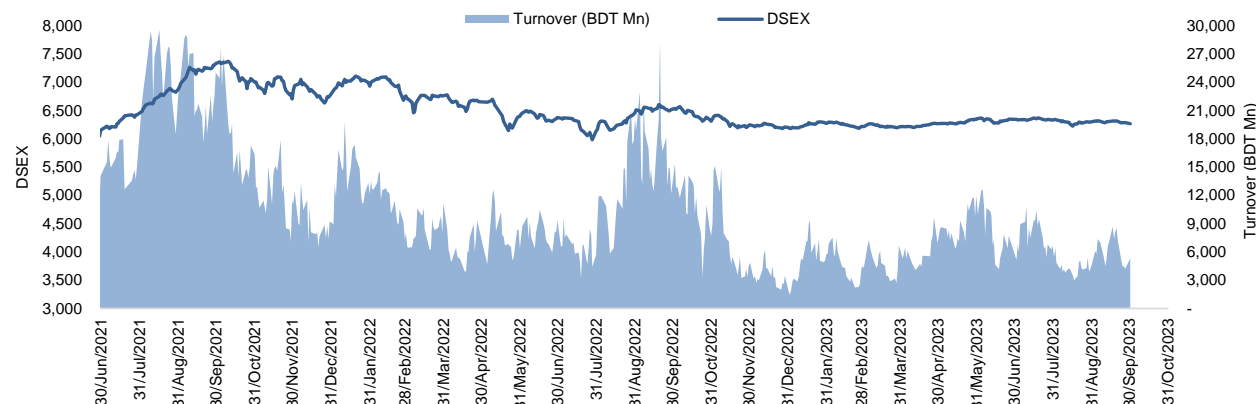


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.31%) lost 19.73 points and closed at 6,264.90. The blue-chip index DS30 (-0.22%), the Shariah-based index DSES (-0.16%), and the large-cap index CDSET (+0.00%) closed at 2,135.69, 1,357.38, and 1,208.31 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.02% followed by NBF1 (0.00%), Telecommunication (0.00%). Food & Allied experienced the highest loss of 0.26% followed by Fuel & Power (-0.06%), Engineering (-0.05%), Bank (-0.01%). Block trades contributed 7.9% of the overall market turnover. Sonali Paper & Board Mills Ltd. (+0.4%) was the most traded share with a turnover of BDT 321 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,264.90	6,284.63	-19.73	-0.31%	+0.9%
DS30	2,135.69	2,140.36	-4.66	-0.22%	-2.7%
DSES	1,357.38	1,359.60	-2.23	-0.16%	-0.1%
CDSET	1,208.31	1,208.28	+0.03	+0.00%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	37	120	145	302
A Category (Equity)	23	75	96	194
B Category (Equity)	11	36	40	87
N Category (Equity)	0	3	0	3
Z Category (Equity)	3	6	9	18
Mutual Funds	0	1	14	15
Corporate Bonds	0	0	1	1
Treasury Bonds	3	1	0	4

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,768,772	7,774,755	-0.1%
	Mn USD	70,309	70,363	
Turnover	Mn BDT	5,319	4,223	+26.0%
	Mn USD	48	38	
Volume	Mn Shares	89	74	+19.6%
No. of Trade		131,940	107,274	+23.0%

\* Average Interbank Exchange Rate is BDT 110.50 as of Oct 01, 2023

**Fahim Hassan**  
 Research Analyst  
 (880) 1709636546  
 fahim.hassan@bracepl.com

**HZ Towhidi Khan**  
 Senior Research Associate  
 (880) 1708805224  
 hztowhidi.khan@bracepl.com

Figure: Sectorial Turnover (BDT Mn)

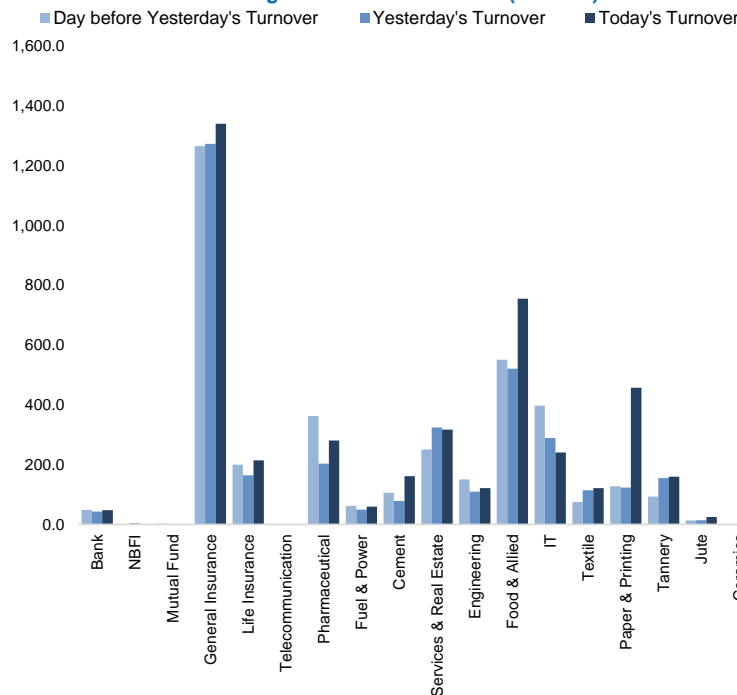
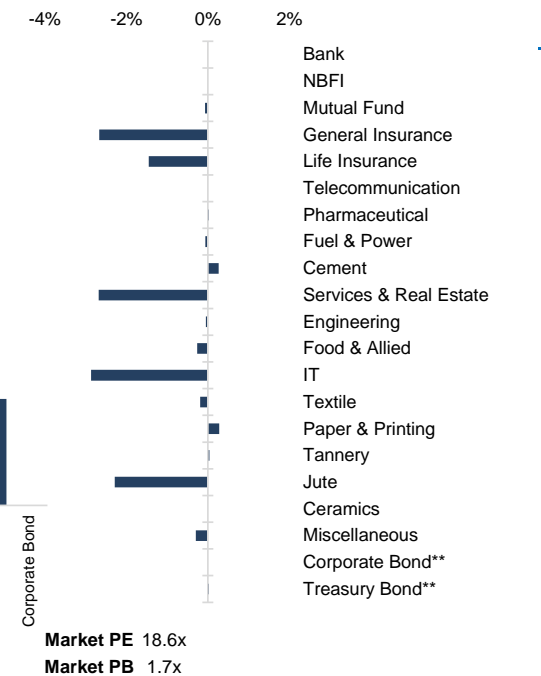


Figure: Sectorial Mcap Change



Market PE 18.6x

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	1,443	1,443	-0.11	-0.01%	35	680,866	8.8%	47.5	1.0%	12.1x	0.7x	GP	386,996	8.6%	0.2	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.8	0.0%	NM	18.4x	WALTONHIL	317,378	7.0%	0.1	40.5x	3.0x
Mutual Fund	827	827	-0.59	-0.07%	36	37,376	0.5%	1.6	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.6	15.4x	6.2x
General Insurance	3,767	3,870	-103.21	-2.67%	42	109,888	1.4%	1,339.8	27.3%	20.4x	1.7x	SQURPHARMA	185,977	4.1%	56.9	9.9x	1.7x
Life Insurance	2,643	2,682	-38.90	-1.45%	15	73,883	1.0%	213.8	4.4%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.2	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,701	3,700	+0.89	+0.02%	34	717,909	9.3%	281.0	5.7%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.2	16.7x	4.4x
Fuel & Power	1,697	1,698	-1.04	-0.06%	23	447,542	5.8%	59.0	1.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,562	2,555	+6.83	+0.27%	7	123,053	1.6%	161.7	3.3%	27.1x	2.7x	BERGERPBL	81,722	1.8%	11.8	26.7x	5.9x
Services & Real Esta	1,849	1,900	-50.91	-2.68%	8	73,055	0.9%	316.5	6.5%	22.8x	1.2x	LHBL	81,180	1.8%	130.5	13.8x	4.1x
Engineering	4,479	4,481	-2.21	-0.05%	42	525,992	6.8%	121.1	2.5%	60.8x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,442	21,498	-56.15	-0.26%	21	396,764	5.1%	754.4	15.4%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,065	3,156	-90.30	-2.86%	11	39,963	0.5%	240.2	4.9%	28.2x	2.9x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,611	1,614	-3.06	-0.19%	58	168,611	2.2%	121.3	2.5%	78.6x	1.1x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	10,334	10,305	+28.88	+0.28%	6	39,816	0.5%	457.1	9.3%	38.4x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,176	3,175	+1.22	+0.04%	6	33,548	0.4%	159.8	3.3%	44.4x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	15,590	15,954	-364.17	-2.28%	3	3,814	0.0%	25.3	0.5%	NM	-1323.9x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.2	0.0%	53.4x	1.9x	UNILEVERCL	38,909	0.9%	0.1	45.0x	22.1x
Miscellaneous	4,120	4,132	-12.25	-0.30%	14	224,337	2.9%	356.0	7.3%	15.8x	1.8x	POWERGRID	37,347	0.8%	0.1	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,137	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.1	12.1x	0.9x
Treasury Bond**	88	88	+0.02	+0.02%	241	3,191,905	41.3%	241.5	4.9%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	152.0	+9.3%	32.3	NM	NM
LEGACYFOOT	88.5	+9.0%	92.3	NM	9.9x
AMBEEPHA	827.8	+7.5%	30.5	NM	43.5x
CRYSTALINS	118.8	+6.5%	293.4	36.6x	4.8x
JUTESPINN	383.1	+5.8%	2.7	NM	NM
SAMORITA	79.2	+5.0%	30.3	NM	1.6x
GQBALLPEN	118.1	+4.0%	12.2	NM	1x
SIMTEX	24.6	+3.4%	78.9	27.0x	1.1x
HAKKANIPUL	60.5	+3.1%	12.9	NM	2.6x
KOHINOOR	462.2	+3.0%	28.6	40.5x	8.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	123.2	-9.9%	97.5	NM	NM
MIRACLEIND	41.9	-9.9%	66.2	NM	2x
DAFODILCOM	94.2	-8.5%	45.6	NM	6.9x
NFML	13.4	-8.2%	5.9	70.5x	1.1x
UNIONINS	63.4	-7.6%	168.6	25.8x	3.5x
RDFOOD	37.5	-7.4%	54.5	30.5x	2.3x
DGIC	34.8	-7.2%	32.0	38.2x	2.9x
MEGHNALIFE	77.4	-7.1%	41.8	NM	NM
CLICL	54.5	-6.8%	9.9	NM	NM
AGRANINS	40.7	-6.7%	18.9	20.6x	1.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.9x	1.7x
BATBC	74,086	4.3%	15.4x	6.2x
BEXIMCO	69,196	4.0%	12.0x	1.2x
RENATA	68,042	3.9%	38.0x	4.6x
BXPHARMA	45,564	2.6%	14.6x	1.5x
BEACONPHAR	39,617	2.3%	80.9x	9.2x
GP	38,700	2.2%	11.9x	7.3x
BRACBANK	30,964	1.8%	8.3x	0.9x
ISLAMIBANK	29,927	1.7%	8.4x	0.7x
LHBL	28,562	1.6%	13.8x	4.1x
PUBALIBANK	19,162	1.1%	4.4x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	18.7x	3.1x
ROBI	15,714	0.9%	69.8x	2.5x
ALARABANK	14,357	0.8%	15.6x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
SEAPEARL	13,733	0.8%	26.3x	10.5x
UPGDCL	13,547	0.8%	16.7x	4.4x
PRIMEBANK	13,491	0.8%	5.2x	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
SONALIPAPR	643.9	+0.4%	320.5	68.9x	3.8x
CRYSTALINS	118.8	+6.5%	293.4	36.6x	4.8x
KBPPWBIL	26.7	-1.1%	178.4	NM	2.2x
UNIONINS	63.4	-7.6%	168.6	25.8x	3.5x
GEMINISEA	808.4	-1.1%	167.1	38.5x	31.9x
FUWANGFOO	28.2	-6.6%	166.7	NM	7.1x
SEAPEARL	181.5	-3.4%	148.1	26.3x	10.5x
APEXFOODS	429.8	+0.6%	138.8	43.3x	3.4x
LHBL	69.9	+0.7%	130.5	13.8x	4.1x
EMERALDOIL	123.2	-9.9%	97.5	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	173.0	171.9	8.0	420	72.58
EMERALDOIL	150.0	140.0	7.0	481	69.08
CRYSTALINS	115.0	104.0	6.0	539	60.29
NBL	9.1	9.1	1.0	5,000	45.50
SONALIPAPR	689.1	655.0	3.0	42	27.58
BRACBANK	34.5	32.9	4.0	602	20.62
RDFOOD	44.5	36.5	4.0	494	20.33
GEMINISEA	833.0	833.0	2.0	12	10.37
FINEFOODS	118.0	108.5	2.0	74	8.58
CNATEX	9.3	9.2	4.0	915	8.44

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	173.0	171.9	72.6	420	8
EMERALDOIL	150.0	140.0	69.1	481	7
CRYSTALINS	115.0	104.0	60.3	539	6
NBL	9.1	9.1	45.5	5,000	1
SONALIPAPR	689.1	655.0	27.6	42	3
BRACBANK	34.5	32.9	20.6	602	4
RDFOOD	44.5	36.5	20.3	494	4
GEMINISEA	833.0	833.0	10.4	12	2
FINEFOODS	118.0	108.5	8.6	74	2
CNATEX	9.3	9.2	8.4	915	4
AIL	86.0	85.9	8.3	97	2
DULAMACOT	63.8	63.8	5.5	86	1
KDSALTD	84.7	84.7	4.7	55	2
UNIQUEHRL	68.3	68.3	4.6	68	1
POPULAR1MF	5.1	5.1	4.6	905	1
BATBC	495.2	479.8	4.2	9	7
CITYGENINS	46.5	46.5	4.2	90	1
EGEN	40.7	40.7	4.1	100	1
SINGERBD	142.0	138.2	3.5	25	5
BXPHERMA	146.2	146.2	3.2	22	1
IFIC1STMF	5.1	5.1	2.9	566	1
LRBDL	32.0	31.6	2.9	90	2
<b>Total</b>			<b>420.6</b>		<b>96</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
WALTONHIL		300.0%	0%	Record Date	2-Oct-23
UNIONCAP		0.0%	0%	Record Date	4-Oct-23
PHOENIXFIN		0.0%	0%	Record Date	12-Oct-23
PLFSL		0.0%	0%	Record Date	12-Oct-23
PLFSL		0.0%	0%	Record Date	12-Oct-23
PLFSL		0.0%	0%	Record Date	12-Oct-23
EHL		0.0%	25%	Record Date	18-Oct-23
APEXFOOT		10.0%	35%	Record Date	18-Oct-23
BAYLEASING		0.0%	0%	Record Date	18-Oct-23
BBS		0.0%	0%	Record Date	22-Oct-23
NAHEEACP		0.0%	3%	Record Date	22-Oct-23
BBSCABLES		0.0%	2%	Record Date	22-Oct-23
UNIQUEHRL		0.0%	20%	Record Date	23-Oct-23
EGEN		0.0%	10%	Record Date	8-Nov-23

#### Important DSE News

##### PHOENIXFIN

**(Q1 Un-audited):** EPS was Tk. (8.61) for January-March 2023 as against Tk. 0.08 for January-March 2022. NOCFPS was Tk. (1.11) for January-March 2023 as against Tk. (0.25) for January-March 2022. NAV per share was Tk. 0.57 as on March 31, 2023 and Tk. 9.18 as on December 31, 2022.

**(Q2 Un-audited):** EPS was Tk. (4.86) for April-June 2023 as against Tk. (0.07) for April-June 2022; EPS was Tk. (13.47) for January-June 2023 as against Tk. 0.01 for January-June 2022. NOCFPS was Tk. (1.53) for January-June 2023 as against Tk. 0.90 for January-June 2022. NAV per share was Tk. (4.28) as on June 30, 2023 and Tk. 9.18 as on December 31, 2022.

##### ALARABANK

Mr. Mir Ahammad, one of the Sponsors of the company, has expressed intention to transfer his entire holding of 52,17,594 shares of the company to his son Mr. Mohammad Abdus Salam, who is also a Director of the company, by way of gift outside the trading system of the Exchange by October 31, 2023.

##### LINDEBD

The Company has informed that it has received Provisional Letter of Allotment wherein the Company has been allotted 5 acres of industrial land at the Mirsarai Economic Zone in Chattogram by Bangladesh Economic Zones Authority (BEZA), to set-up its new manufacturing facility. The Company is in the process of signing the lease agreement with BEZA subject to fulfilment of certain terms and conditions.

##### PLFSL

The Board of Directors has recommended No dividend for the year ended December 31, 2019. Date of AGM: 29.10.2023, Time: 11:30 AM, Venue: Digital Platform. Record Date: 12.10.2023. The Company has also reported Consolidated EPS of Tk. (19.76), Consolidated NAV per share of Tk. (83.53) and Consolidated NOCFPS of Tk. 3.47 for the year ended December 31, 2019 as against Tk. (5.52), Tk. (65.59) and Tk. (3.69) for the year ended December 31, 2018.

The Board of Directors has recommended No dividend for the year ended December 31, 2020. Date of AGM: 29.10.2023, Time: 12:30 PM, Venue: Digital Platform. Record Date: 12.10.2023. The Company has also reported Consolidated EPS of Tk. (22.32), Consolidated NAV per share of Tk. (101.24) and Consolidated NOCFPS of Tk. (0.05) for the year ended December 31, 2020 as against Tk. (19.76), Tk. (83.53) and Tk. 3.47 for the year ended December 31, 2019.

The Board of Directors has recommended No Dividend for the year ended December 31, 2021. Date of AGM: 29.10.2023, Time: 01:30 PM, Venue: Digital Platform. Record Date: 12.10.2023. The Company has also reported Consolidated EPS of Tk. (14.40), Consolidated NAV per share of Tk. (115.34) and Consolidated NOCFPS of Tk. 1.63 for the year ended December 31, 2021 as against Tk. (22.32), Tk. (101.24) and Tk. (0.05) respectively for the year ended December 31, 2020.

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