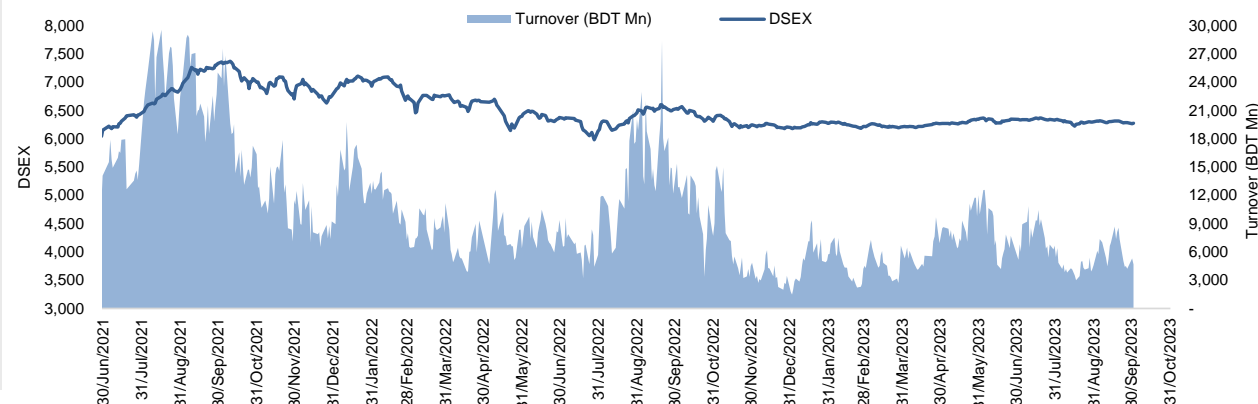


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.13%) gained 8.03 points and closed at 6,272.94. The blue-chip index DS30 (-0.05%), the Shariah-based index DSES (+0.02%), and the large-cap index CDSET (0.00%) closed at 2,134.63, 1,357.61, and 1,208.28 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.02% followed by Engineering (+0.01%), Engineering (+0.01%). Food & Allied experienced the highest loss of 0.06% followed by Pharmaceutical (-0.06%), Bank (0.00%). Block trades contributed 13.7% of the overall market turnover. Republic Insurance Company Limited (+10.0%) was the most traded share with a turnover of BDT 218 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,272.94	6,264.90	+8.03	+0.13%	+1.1%
DS30	2,134.63	2,135.69	-1.07	-0.05%	-2.8%
DSES	1,357.61	1,357.38	+0.23	+0.02%	-0.1%
CDSET	1,208.28	1,208.31	-0.03	-0.00%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	87	58	137	282
A Category (Equity)	58	35	88	181
B Category (Equity)	25	15	41	81
N Category (Equity)	3	0	0	3
Z Category (Equity)	1	8	8	17
Mutual Funds	1	0	11	12
Corporate Bonds	0	0	0	0
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,771,442	7,768,772	+0.0%
	Mn USD	70,330	70,306	
Turnover	Mn BDT	4,659	5,319	-12.4%
	Mn USD	42	48	
Volume	Mn Shares	91	89	+2.2%
No. of Trade		120,206	131,940	-8.9%

* Average Interbank Exchange Rate is BDT 110.50 as of Oct 02, 2023

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Figure: Sectorial Turnover (BDT Mn)

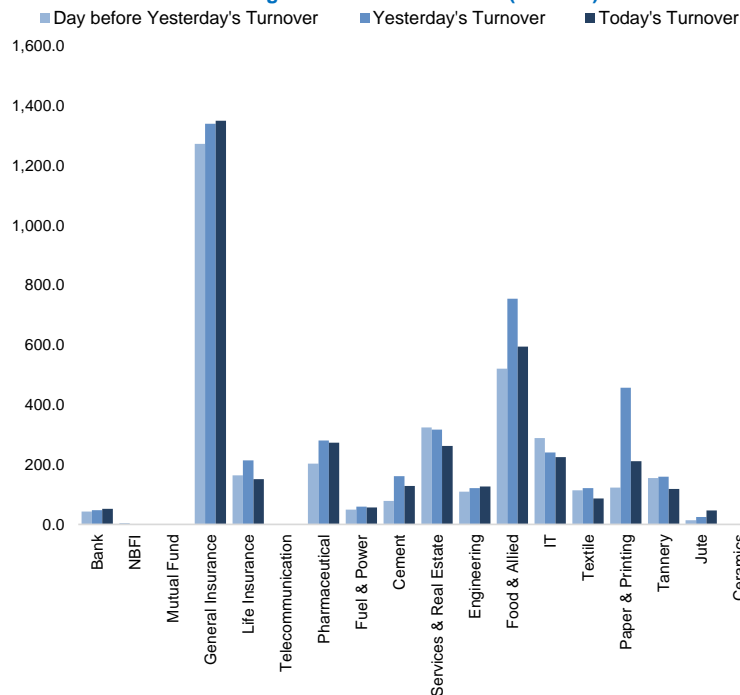
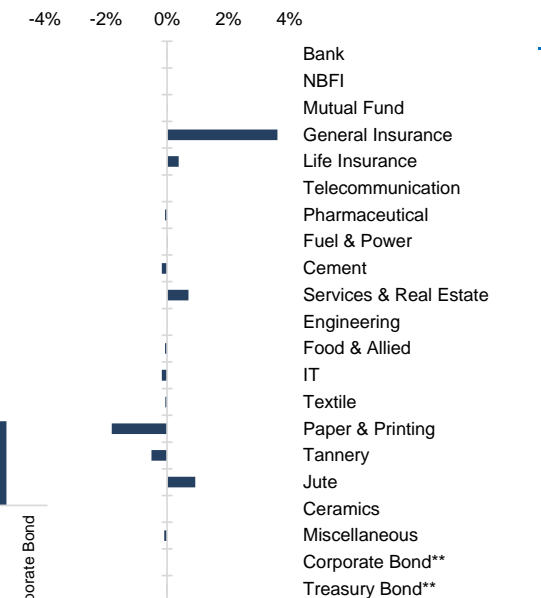


Figure: Sectorial Mcap Change



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	-0.02	-0.00%	35	680,856	8.8%	52.5	1.3%	12.1x	0.7x	GP	386,996	8.5%	0.8	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.3	0.0%	NM	18.4x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	827	827	+0.15	+0.02%	36	37,383	0.5%	0.9	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.2	15.4x	6.2x
General Insurance	3,903	3,767	+135.78	+3.60%	42	113,849	1.5%	1,349.7	33.6%	21.1x	1.8x	SQURPHARMA	185,977	4.1%	12.9	9.9x	1.7x
Life Insurance	2,653	2,643	+10.01	+0.38%	15	74,163	1.0%	151.1	3.8%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.9	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,699	3,701	-2.32	-0.06%	34	717,459	9.3%	273.3	6.8%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,697	1,697	+0.41	+0.02%	23	447,649	5.8%	56.7	1.4%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,558	2,562	-4.41	-0.17%	7	122,841	1.6%	128.4	3.2%	27.1x	2.7x	BERGERPBL	81,477	1.8%	5.9	26.6x	5.8x
Services & Real Esta	1,862	1,849	+12.94	+0.70%	8	73,566	1.0%	262.7	6.5%	22.9x	1.2x	LHBL	81,296	1.8%	110.3	13.8x	4.1x
Engineering	4,479	4,479	+0.42	+0.01%	42	526,042	6.8%	126.7	3.2%	60.8x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,429	21,442	-13.50	-0.06%	21	396,514	5.1%	594.8	14.8%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,060	3,065	-5.40	-0.18%	11	39,892	0.5%	224.6	5.6%	28.2x	2.9x	BRACBANK	57,596	1.3%	0.7	8.3x	0.9x
Textile	1,610	1,611	-0.92	-0.06%	58	168,515	2.2%	86.4	2.2%	78.5x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,147	10,334	-187.19	-1.81%	6	39,094	0.5%	211.7	5.3%	37.7x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,160	3,176	-16.21	-0.51%	6	33,376	0.4%	118.8	3.0%	44.2x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	15,734	15,590	+144.35	+0.93%	3	3,849	0.0%	46.9	1.2%	NM	-1336.2x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.1	0.0%	53.4x	1.9x	UNILEVERCL	38,867	0.9%	0.3	44.9x	22.1x
Miscellaneous	4,117	4,120	-3.67	-0.09%	14	224,137	2.9%	281.7	7.0%	15.8x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,137	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	-0.01	-0.01%	241	3,191,611	41.3%	51.1	1.3%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
REPUBLIC	57.4	+10.0%	218.3	28.8x	3.3x
FUWANGFOOD	31.0	+9.9%	199.0	NM	7.8x
BNICL	66.8	+9.9%	153.1	19.1x	2.6x
EASTERNINS	65.4	+9.5%	69.1	21.1x	1.2x
LIBRAINFU	925.3	+7.5%	66.0	NM	0.7x
DGIC	37.4	+7.5%	35.1	41.1x	3.1x
UNIONINS	67.7	+6.8%	82.3	27.5x	4x
NFML	14.3	+6.7%	2.6	75.3x	1.2x
SONARBAINS	50.2	+6.4%	9.3	33.4x	2.1x
AMBEEPHA	878.3	+6.1%	52.5	NM	46.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JUTESPINN	352.0	-8.1%	2.7	NM	NM
SHYAMPSUG	142.8	-6.1%	6.9	NM	NM
ZEALBANGLA	128.3	-5.7%	2.3	NM	NM
MEGHNAPEL	34.4	-5.5%	1.4	NM	NM
CRYSTALINS	113.6	-4.4%	47.0	35.0x	4.6x
APEXFOODS	414.2	-3.6%	74.4	41.7x	3.3x
APEXSPINN	124.0	-3.3%	4.9	35.7x	2.1x
APEXTANRY	104.5	-3.2%	1.1	NM	1.8x
IMAMBUTTON	142.6	-2.8%	11.1	NM	29.6x
NAVANAPHAR	88.5	-2.5%	24.5	20.1x	2.2x

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%	18.5x	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
SEAPPEARL	13,733	0.8%	26.7x	10.6x
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
REPUBLIC	57.4	+10.0%	218.3	28.8x	3.3x
FUWANGFOOD	31.0	+9.9%	199.0	NM	7.8x
BNICL	66.8	+9.9%	153.1	19.1x	2.6x
SONALIPAPR	630.0	-2.2%	152.8	67.4x	3.7x
SEAPPEARL	184.0	+1.4%	138.6	26.7x	10.6x
KBPPWBIL	28.1	+5.2%	128.0	NM	2.4x
GEMINISEA	793.7	-1.8%	116.8	37.8x	31.3x
PROVATIINS	64.0	+3.4%	111.5	33.6x	3.0x
LHBL	70.0	+0.1%	110.3	13.8x	4.1x
UNIONINS	67.7	+6.8%	82.3	27.5x	3.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EBL	29.4	29.4	3.0	5,000	147.00
TRUSTBANK	31.5	31.5	4.0	4,300	135.45
FORTUNE	75.7	71.7	5.0	1,153	86.69
NBL	9.1	9.1	1.0	5,000	45.50
REPUBLIC	54.0	52.0	3.0	697	37.54
SONALIPAPR	692.0	660.0	4.0	31	20.79
UNIONINS	68.8	64.0	4.0	320	20.54
BSRMSTEEL	63.9	63.9	1.0	300	19.17
GP	261.6	261.6	10.0	62	16.15
BRACBANK	34.5	34.5	1.0	400	13.80

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EBL	29.4	29.4	147.0	5,000	3
TRUSTBANK	31.5	31.5	135.5	4,300	4
FORTUNE	75.7	71.7	86.7	1,153	5
NBL	9.1	9.1	45.5	5,000	1
REPUBLIC	54.0	52.0	37.5	697	3
SONALIPAPR	692.0	660.0	20.8	31	4
UNIONINS	68.8	64.0	20.5	320	4
BSRMSTEEL	63.9	63.9	19.2	300	1
GP	261.6	261.6	16.2	62	10
BRACBANK	34.5	34.5	13.8	400	1
EGEN	40.7	40.7	12.2	300	2
SEAPEARL	197.0	170.0	10.6	61	5
SIMTEX	27.0	25.0	8.0	318	4
RENATA	1,217.9	1,217.9	7.6	6	1
PTL	76.0	76.0	6.4	84	2
WMSHIPYARD	10.8	10.0	5.8	549	6
ORIONPHARM	81.1	71.7	5.0	63	3
HRTEX	111.7	107.6	4.0	37	5
BATBC	480.0	479.8	4.0	8	7
SILCOPHL	22.0	21.9	3.8	175	3
SAIHAMTEX	17.6	15.9	2.9	175	4
OAL	10.4	10.4	2.6	248	1
Total			640.4		108

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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		0.0%	35%	Record Date	18-Oct-23
BAYLEASING		10.0%	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
INTECH		0.0%	0%	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

INTECH

The Board of Directors has recommended No dividend for the year ended June 30, 2022. Record Date: 22.10.2023. The Company has also reported EPS of Tk. (1.15), NAV per share of Tk. 0.53 and NOCFPS of Tk. (0.36) for the year ended June 30, 2022 as against Tk. (2.75), Tk. 1.67 and Tk. (0.24) respectively for the year ended June 30, 2021. Date and time of 21st AGM: November 16, 2023 at 11:00 AM. Date and time of 22nd AGM: November 16, 2023 at 12:00 PM. Venue of both AGMs: Digital Platform.

SKICL

The Company has informed that the Board of Directors has elected Major General Md Habib Ullah, SPP, ndc, afwc, psc, M Phil as the Chairman of the Company.

NBL

Refer to their earlier news regarding dividend declaration for the year ended December 31, 2022 disseminated on 02.05.2023 and postponement of 40th AGM disseminated on 26.07.2023. In this connection, the company has now informed that the Board of Directors of the Company has decided to hold the 40th AGM on December 21, 2023 at 11.30 a.m. through digital platform instead of earlier declared date subject to consent from regulatory authorities.

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