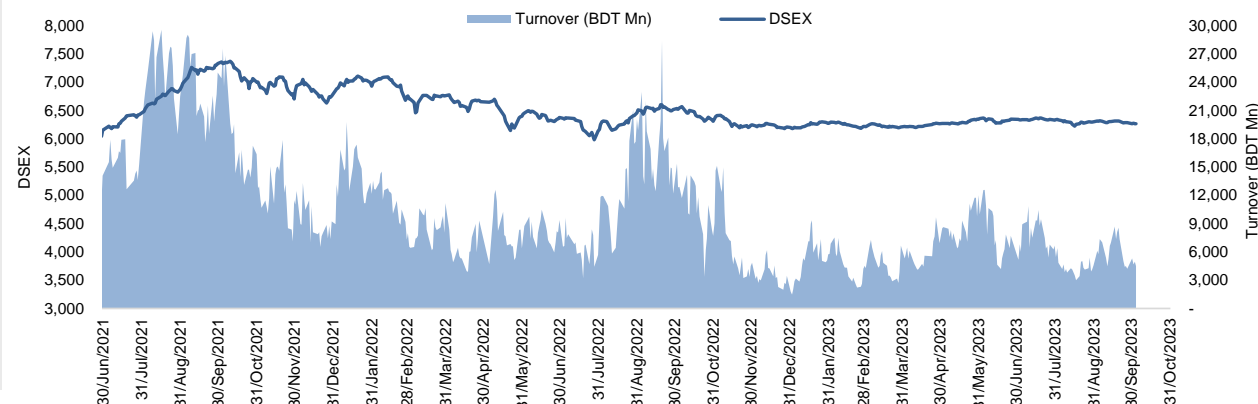


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.01%) gained 0.35 points and closed at 6,262.79. The blue-chip index DS30 (+0.04%), the Shariah-based index DSES (-0.05%), and the large-cap index CDESET (+0.01%) closed at 2,135.37, 1,356.07, and 1,209.48 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.07% followed by Engineering (+0.03%), Bank (+0.03%). Food & Allied experienced the highest loss of 0.18% followed by Fuel & Power (-0.02%), NBFI (0.00%). Block trades contributed 17.5% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+0.3%) was the most traded share with a turnover of BDT 285 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,262.79	6,262.44	+0.35	+0.01%	+0.9%
DS30	2,135.37	2,134.55	+0.82	+0.04%	-2.7%
DSES	1,356.07	1,356.81	-0.74	-0.05%	-0.2%
CDESET	1,209.48	1,209.33	+0.15	+0.01%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	64	75	164	303
A Category (Equity)	39	53	109	201
B Category (Equity)	19	19	46	84
N Category (Equity)	0	2	0	2
Z Category (Equity)	6	1	9	16
Mutual Funds	1	2	14	17
Corporate Bonds	1	0	3	4
Treasury Bonds	1	0	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,767,762	7,766,743	+0.0%
	Mn USD	70,296	70,287	
Turnover	Mn BDT	4,510	4,972	-9.3%
	Mn USD	41	45	
Volume	Mn Shares	88	95	-6.6%
No. of Trade		103,444	123,593	-16.3%

\* Average Interbank Exchange Rate is BDT 110.50 as of Oct 04, 2023

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Figure: Sectorial Turnover (BDT Mn)

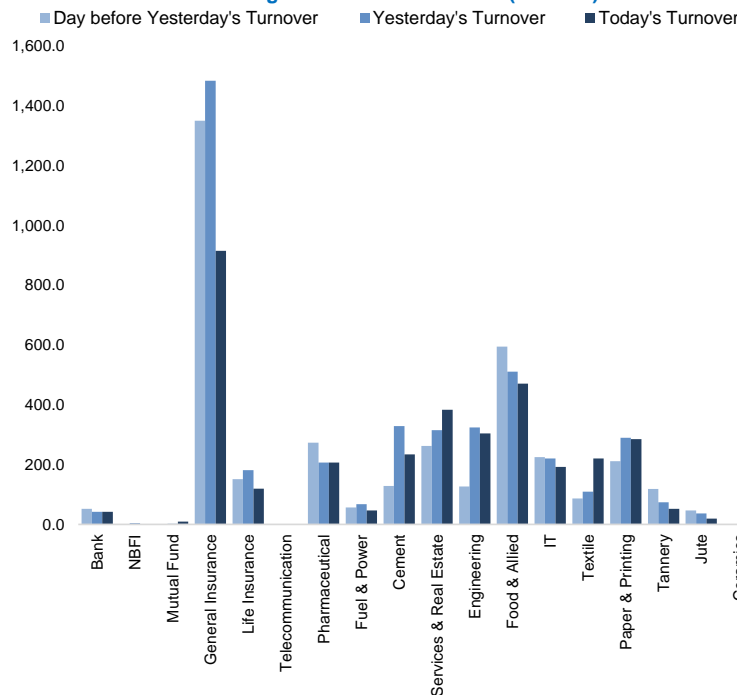
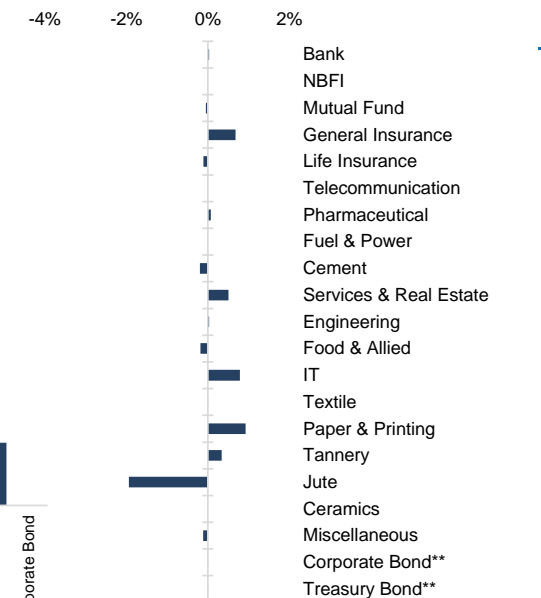


Figure: Sectorial Mcap Change



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	1,442	1,442	+0.44	+0.03%	35	680,655	8.8%	42.6	1.1%	12.1x	0.7x	GP	386,996	8.6%	0.1	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.0	0.0%	NM	18.4x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	826	826	-0.40	-0.05%	36	37,345	0.5%	9.3	0.2%	NM	0.7x	BATBC	280,098	6.2%	0.6	15.4x	6.2x
General Insurance	3,786	3,760	+25.53	+0.68%	42	110,435	1.4%	914.6	24.6%	20.5x	1.7x	SQURPHARMA	185,977	4.1%	31.3	9.9x	1.7x
Life Insurance	2,622	2,625	-2.78	-0.11%	15	73,293	0.9%	119.7	3.2%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.1	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,699	3,696	+2.55	+0.07%	34	717,537	9.3%	207.2	5.6%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,697	1,697	-0.27	-0.02%	23	447,567	5.8%	46.5	1.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,579	2,584	-4.98	-0.19%	7	123,886	1.6%	234.0	6.3%	27.3x	2.7x	LHBL	82,341	1.8%	213.8	14.0x	4.2x
Services & Real Esta	1,870	1,860	+9.45	+0.51%	8	73,872	1.0%	383.3	10.3%	23.0x	1.2x	BERGERPBL	81,667	1.8%	6.1	26.7x	5.9x
Engineering	4,484	4,483	+1.54	+0.03%	42	526,653	6.8%	304.3	8.2%	60.9x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,403	21,443	-39.42	-0.18%	21	396,043	5.1%	471.0	12.7%	19.9x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,063	3,039	+23.92	+0.79%	11	39,933	0.5%	192.7	5.2%	28.2x	2.9x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,609	1,609	+0.04	+0.00%	58	168,395	2.2%	220.4	5.9%	78.5x	1.1x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	10,046	9,953	+92.37	+0.93%	6	38,705	0.5%	285.3	7.7%	37.3x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,157	3,147	+10.62	+0.34%	6	33,347	0.4%	52.4	1.4%	44.1x	3.1x	DUTCHBANGL	44,203	1.0%	0.1	7.9x	1.0x
Jute	15,530	15,837	-306.56	-1.94%	3	3,799	0.0%	19.5	0.5%	NM	-1318.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.0	0.0%	53.4x	1.9x	UNILEVERCL	38,874	0.9%	0.2	45.0x	22.1x
Miscellaneous	4,110	4,115	-4.84	-0.12%	14	223,777	2.9%	209.2	5.6%	15.8x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.01%	10	35,139	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	241	3,191,661	41.3%	10.1	0.3%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RELIANCINS	75.2	+7.7%	81.6	14.7x	1.1x
DESHBANDHU	29.1	+7.4%	183.4	83.1x	1.6x
BEACHHATCH	45.3	+5.3%	55.8	43.6x	4.3x
ZEALBANGLA	127.8	+4.5%	0.5	NM	NM
INTECH	26.1	+4.4%	10.4	NM	49.2x
ARAMITCEM	24.4	+4.3%	7.0	NM	25.2x
YPL	26.1	+4.0%	60.3	NM	5x
SHYAMPSUG	141.3	+3.9%	7.9	NM	NM
MEGHNA PET	36.5	+3.1%	4.2	NM	NM
DAFODILCOM	97.5	+3.0%	36.9	NM	7.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
APEXFOODS	382.2	-7.2%	106.6	42.9x	2.8x
KBPPWBIL	27.2	-4.9%	107.5	NM	2x
CAPMIBBLMF	9.9	-3.9%	9.0	NM	1.1x
LEGACYFOOT	83.2	-3.6%	28.9	NM	9.3x
EMERALDOIL	119.6	-3.5%	38.2	NM	NM
AZIZPIPES	97.4	-3.5%	11.9	NM	NM
NTC	429.9	-3.1%	2.3	NM	212.8x
AIL	72.1	-2.8%	37.1	45.1x	3.2x
SONALIANSH	513.1	-2.8%	16.7	NM	4.4x
INTRACO	35.1	-2.8%	28.1	23.3x	2.7x

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%	14.0x	4.2x
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%	27.5x	11.0x
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
SEAPPEARL	189.7	+0.3%	284.8	27.5x	11.0x
SONALIPAPR	628.6	+2.2%	246.8	67.2x	3.7x
LHBL	70.9	-0.1%	213.8	14.0x	4.2x
DESHBANDHU	29.1	+7.4%	183.4	83.1x	1.6x
REPUBLIC	57.1	+2.5%	137.4	28.7x	3.3x
FUWANGFOOT	30.6	-1.0%	126.7	NM	7.7x
HRTEX	117.6	+1.5%	117.5	39.2x	2.7x
KBPPWBIL	27.2	-4.9%	107.5	NM	2.3x
APEXFOODS	382.2	-7.2%	106.6	42.9x	2.8x
UNIONINS	62.9	+2.1%	83.7	25.6x	3.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPPEARL	187.1	170.5	26.0	1,095	194.39
EBL	29.4	28.0	5.0	5,100	149.80
TRUSTBANK	31.5	31.5	3.0	4,300	135.45
NBL	9.1	9.1	1.0	8,000	72.80
SONALIPAPR	660.9	571.0	7.0	59	38.52
MTB	14.0	14.0	1.0	2,136	29.91
HRTEX	117.0	107.0	12.0	230	25.58
PRAGATILIF	110.4	110.4	3.0	196	21.63
UTTARABANK	22.0	22.0	1.0	864	19.01
ANWARGALV	212.9	212.8	2.0	55	11.68

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	187.1	170.5	194.4	1,095	26
EBL	29.4	28.0	149.8	5,100	5
TRUSTBANK	31.5	31.5	135.5	4,300	3
NBL	9.1	9.1	72.8	8,000	1
SONALIPAPR	660.9	571.0	38.5	59	7
MTB	14.0	14.0	29.9	2,136	1
HRTEX	117.0	107.0	25.6	230	12
PRAGATILIF	110.4	110.4	21.6	196	3
UTTARABANK	22.0	22.0	19.0	864	1
ANWARGALV	212.9	212.8	11.7	55	2
BSCCL	218.5	199.9	9.4	45	4
CNATEX	10.2	10.2	9.3	907	1
PTL	69.5	69.3	8.6	123	11
DESHBANDHU	28.0	27.1	5.2	189	5
BATBC	481.0	480.0	5.1	11	4
CITYGENINS	46.0	46.0	4.6	100	1
PARAMOUNT	71.9	71.9	3.6	50	1
DAFODILCOM	94.8	93.0	3.6	38	2
BRACBANK	33.8	33.1	3.5	105	4
SPCL	65.4	65.4	2.6	40	1
SILVAPHL	19.7	19.5	2.6	132	2
JHRML	81.9	81.9	2.6	31	1
<b>Total</b>			<b>787.3</b>		<b>130</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BSCABLES		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
APEXSPINN		0.0%	20%	Record Date	26-Oct-23
APEXFOODS		0.0%	20%	Record Date	26-Oct-23
EGEN		0.0%	10%	Record Date	8-Nov-23

#### Important DSE News

##### APEXSPINN

The Board of Directors has recommended 20% cash dividend for the year ended June 30, 2023. Date of AGM: 30.11.2023, Time: 9:30 AM, Venue: Digital Platform. Record Date: 26.10.2023. The Company has reported EPS of Tk. 3.51, NAV per share of Tk. 64.37 and NOCFPS of Tk. 26.24 for the year ended June 30, 2023 as against Tk. 3.45, Tk. 58.38 and Tk. 0.19 respectively for the year ended June 30, 2022.

##### APEXFOODS

The Board of Directors has recommended 20% Cash Dividend for the year ended June 30, 2023. Date of AGM: 30.11.2023, Time: 11:30 AM, Venue: Digital Platform. Record date: 26.10.2023. The Company has also reported EPS of Tk. 8.91, NAV per share of Tk. 136.20 and NOCFPS of Tk. 81.84 for the year ended June 30, 2023 as against Tk. 5.14, Tk. 126.18 and Tk. 62.14 respectively for the year ended June 30, 2022.

##### ALARABANK

Mr. Mir Ahammad, one of the Sponsors of the company, has further informed that he has completed transfer of 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 as per declaration disseminated on 01.10.2023.

##### LINDEBD

Refer to their earlier news disseminated by DSE on 18.04.2023 regarding EGM for approval of the scheme of arrangement for demerger, the company has further informed that the Hon'ble High Court of the Supreme Court of Bangladesh by a judgment and order dated 14.08.2023 passed in Company Matter No. 107 of 2023, has approved the scheme of arrangement for demerger of Linde Bangladesh Limited whereby the hardgoods business of Linde Bangladesh Limited, together with its assets and liabilities, will be transferred and vested in Linde Industries Pvt. Ltd.

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