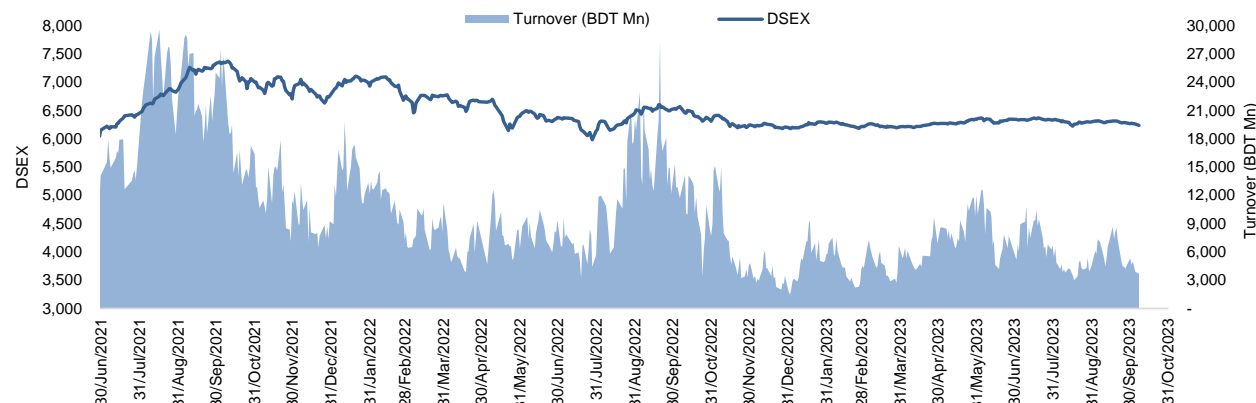


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.39%) lost 24.48 points and closed at 6,237.24. The blue-chip index DS30 (-0.32%), the Shariah-based index DSES (-0.34%), and the large-cap index CDSET (-0.04%) closed at 2,130.72, 1,351.26, and 1,208.91 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.19% followed by Bank (-0.14%), Food & Allied (-0.13%), Engineering (-0.11%). Block trades contributed 13.9% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+0.6%) was the most traded share with a turnover of BDT 177 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,237.24	6,261.72	-24.48	-0.39%	+0.5%
DS30	2,130.72	2,137.66	-6.94	-0.32%	-2.9%
DSES	1,351.26	1,355.82	-4.56	-0.34%	-0.6%
CDSET	1,208.91	1,209.40	-0.49	-0.04%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	0	14	134	149
A Category (Equity)	0	9	87	98
B Category (Equity)	0	5	38	40
N Category (Equity)	0	0	2	0
Z Category (Equity)	0	0	7	11
Mutual Funds	0	0	2	13
Corporate Bonds	0	1	0	0
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,753,987	7,767,772	-0.2%
	Mn USD	70,172	70,297	
Turnover	Mn BDT	3,678	3,897	-5.6%
	Mn USD	33	35	
Volume	Mn Shares	82	69	+18.1%
No. of Trade		106,163	103,724	+2.4%

\* Average Interbank Exchange Rate is BDT 110.50 as of Oct 08, 2023

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Figure: Sectorial Turnover (BDT Mn)

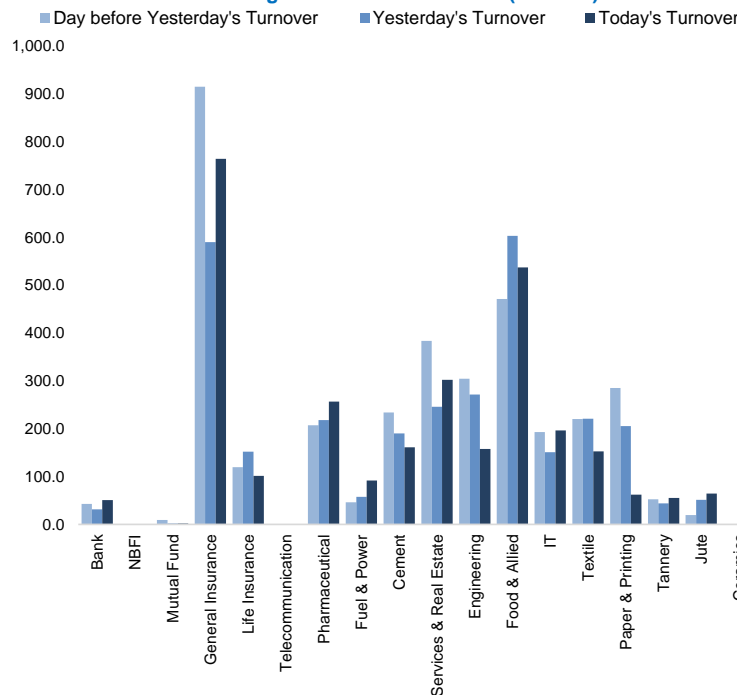
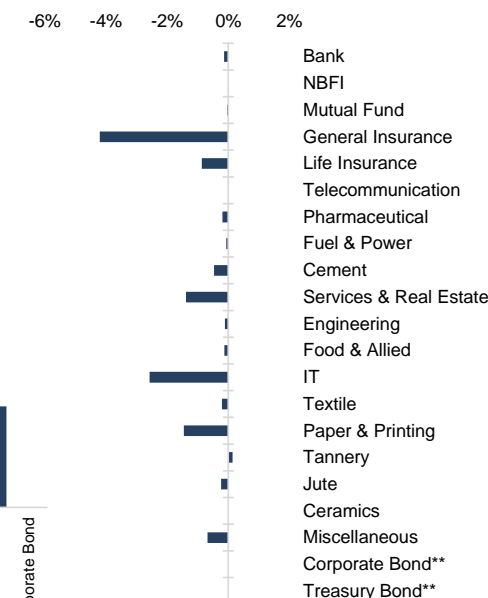


Figure: Sectorial Mcap Change



Market PE 18.5x

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	1,440	1,442	-2.00	-0.14%	35	679,677	8.8%	50.6	1.6%	12.0x	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	18.8x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	825	826	-0.28	-0.03%	36	37,328	0.5%	2.0	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.2	15.4x	6.2x
General Insurance	3,564	3,720	-156.29	-4.20%	42	103,959	1.3%	764.0	24.1%	19.3x	1.6x	SQURPHARMA	185,977	4.1%	24.5	9.9x	1.7x
Life Insurance	2,597	2,620	-22.56	-0.86%	15	72,602	0.9%	101.3	3.2%	NM	NM	ROBI	157,138	3.5%	0.2	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.3	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,696	3,703	-7.08	-0.19%	34	716,887	9.3%	256.7	8.1%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,696	1,697	-1.12	-0.07%	23	447,270	5.8%	91.6	2.9%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,547	2,559	-11.80	-0.46%	7	122,326	1.6%	161.0	5.1%	27.0x	2.6x	BERGERPBL	81,504	1.8%	4.1	26.6x	5.8x
Services & Real Esta	1,854	1,880	-25.97	-1.38%	8	73,250	1.0%	302.0	9.5%	22.8x	1.2x	LHBL	81,180	1.8%	141.2	13.8x	4.1x
Engineering	4,482	4,487	-5.05	-0.11%	42	526,363	6.8%	157.6	5.0%	60.9x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,372	21,399	-27.29	-0.13%	21	395,463	5.1%	536.7	17.0%	19.9x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	2,980	3,058	-78.60	-2.57%	11	38,846	0.5%	196.4	6.2%	27.2x	2.8x	BRACBANK	57,596	1.3%	0.3	8.3x	0.9x
Textile	1,606	1,610	-3.39	-0.21%	58	168,144	2.2%	152.3	4.8%	78.4x	1.1x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	9,852	9,997	-145.02	-1.45%	6	37,958	0.5%	62.3	2.0%	36.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,161	3,156	+4.34	+0.14%	6	33,383	0.4%	55.3	1.7%	44.2x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,013	16,051	-37.86	-0.24%	3	3,917	0.1%	64.5	2.0%	NM	-1359.8x	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	38,909	0.9%	0.3	45.0x	22.1x
Miscellaneous	4,109	4,137	-28.15	-0.68%	14	223,725	2.9%	211.3	6.7%	15.8x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.01%	10	35,144	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.01%	241	3,191,883	41.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CENTRALPHL	12.2	+9.9%	47.9	NM	2.1x
EMERALDOIL	118.7	+6.8%	58.8	NM	NM
NTC	444.0	+1.4%	12.4	NM	219.8x
APEXTANRY	105.9	+1.0%	3.9	NM	1.8x
BATASHOE	984.6	+1.0%	0.6	26.2x	3.5x
AIL	71.4	+0.7%	30.1	44.6x	3.2x
SEAPEARL	193.3	+0.6%	176.9	28.0x	11x
PRAGATILIF	103.8	+0.5%	5.9	NM	NM
JAMUNAOIL	177.1	+0.2%	2.4	6.5x	0.9x
ECABLES	181.6	+0.2%	16.7	60.1x	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIRACLEIND	38.9	-8.9%	40.4	NM	2.2x
ASIAPACINS	52.4	-8.9%	17.1	21.9x	2x
PARAMOUNT	57.9	-7.9%	37.5	38.9x	2.2x
BGIC	56.4	-7.7%	4.9	36.4x	2.7x
REPUBLIC	52.3	-7.6%	57.1	26.3x	3.0x
KBPWBIL	24.6	-7.5%	37.8	NM	2.1x
BNICL	58.7	-7.4%	66.0	16.8x	2.3x
JANATAINS	36.0	-7.2%	15.7	25.6x	2.3x
KARNAPHULI	35.1	-6.9%	37.0	19.8x	1.6x
MEGHNAINS	39.5	-6.8%	13.3	20.1x	2.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.9x	1.7x
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%	18.3x	3.0x
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%	28.0x	11.2x
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
SEAPEARL	193.3	+0.6%	176.9	28.0x	11.2x
GEMINISEA	791.3	-1.5%	144.6	37.7x	31.2x
LHBL	69.9	-0.1%	141.2	13.8x	4.1x
FUWANGFOOI	28.7	-4.3%	96.7	NM	7.2x
BSC	112.3	-4.0%	90.9	7.2x	1.4x
BNICL	58.7	-7.4%	66.0	16.8x	2.3x
CRYSTALINS	103.9	+0.1%	65.3	32.0x	4.2x
HRTEX	118.7	-1.7%	63.5	39.5x	2.7x
SONALIANSH	536.1	+0.1%	63.2	NM	4.6x
PROVATIINS	58.9	-2.2%	62.7	30.9x	2.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NBL	9.1	9.1	2.0	20,000	182.00
SEAPEARL	195.5	178.0	12.0	611	111.16
EMERALDOIL	106.0	100.1	10.0	747	76.18
CRYSTALINS	110.0	102.0	2.0	280	30.74
ABBANK	9.6	9.2	2.0	916	8.47
FINEFOODS	120.1	113.0	2.0	71	8.42
BSRMSTEEL	63.9	63.9	1.0	100	6.39
SONALIPAPR	660.0	581.6	3.0	10	6.36
AL-HAJTEX	165.6	165.0	3.0	34	5.62
BBSCABLES	54.8	48.9	2.0	103	5.57

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
NBL	9.1	9.1	182.0	20,000	2
SEAPPEARL	195.5	178.0	111.2	611	12
EMERALDOIL	106.0	100.1	76.2	747	10
CRYSTALINS	110.0	102.0	30.7	280	2
ABBANK	9.6	9.2	8.5	916	2
FINEFOODS	120.1	113.0	8.4	71	2
BSRMSTEEL	63.9	63.9	6.4	100	1
SONALIPAPR	660.0	581.6	6.4	10	3
AL-HAJTEX	165.6	165.0	5.6	34	3
BBSCABLES	54.8	48.9	5.6	103	2
BATBC	518.7	479.8	4.9	10	2
POWERGRID	47.2	47.2	4.7	100	1
GOLDENSON	20.0	20.0	4.0	200	1
LRBDL	38.0	38.0	3.8	100	1
PREMIERBAN	12.6	12.4	3.8	300	6
PTL	80.0	69.3	3.6	50	5
ROBI	27.2	27.0	3.5	129	2
OAL	10.7	9.2	3.2	304	2
RELIANCINS	79.0	79.0	3.2	40	1
PIONEERINS	76.5	76.0	3.1	41	2
ADNTEL	134.5	134.5	2.7	20	1
SALVOCHEM	55.9	55.8	2.6	47	2
<b>Total</b>			<b>512.3</b>		<b>95</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
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
APEXSPINN		0.0%	20%	Record Date	26-Oct-23
APEXFOODS		0.0%	20%	Record Date	26-Oct-23
ADNTEL		0.0%	15%	Record Date	26-Oct-23
EGEN		0.0%	10%	Record Date	8-Nov-23

#### Important DSE News

##### SPCL

The Company has informed that Petromax Refinery Ltd (PRL) a subsidiary of Shahjibazar Power Co. Ltd. (SPCL) has inked a Long-Term Lease Agreement with Mongla Port Authority (MPA) for 13 Acre of land for 30 years lease period. PRL shall utilize the said land for the expansion of existing storage facilities by installing storage tanks and future enhancement of refining capacity depending on the market demand.

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