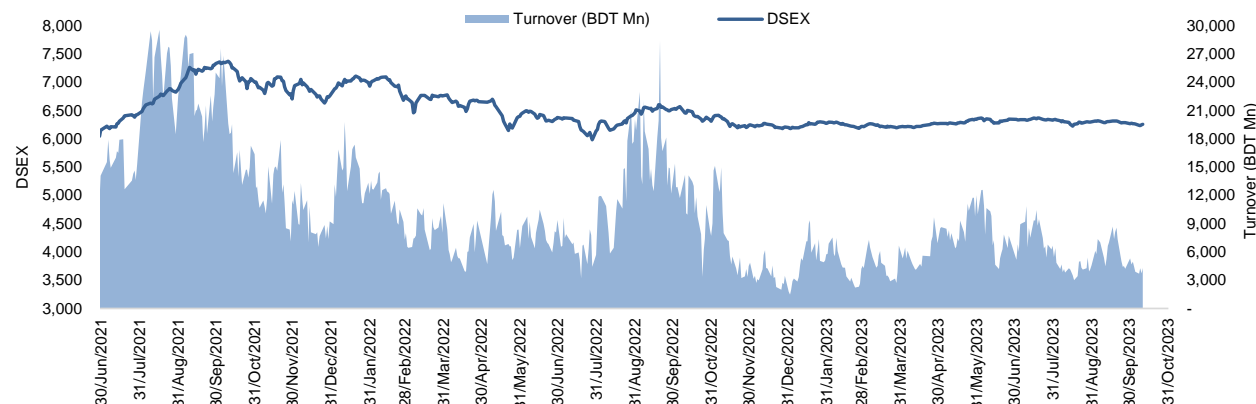


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 8.8 points and closed at 6,256.19. The blue-chip index DS30 (+0.22%), the Shariah-based index DSES (+0.29%), and the large-cap index CDSET (+0.00%) closed at 2,141.39, 1,357.12, and 1,211.07 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.22% followed by Engineering (+0.10%), Fuel & Power (+0.01%). Pharmaceutical experienced the highest loss of 0.04% followed by Bank (-0.02%), NBF1 (0.00%). Block trades contributed 8.0% of the overall market turnover. Fu Wang Food Ltd. (+9.9%) was the most traded share with a turnover of BDT 331 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,256.19	6,247.38	+8.80	+0.14%	+0.8%
DS30	2,141.39	2,136.72	+4.67	+0.22%	-2.5%
DSES	1,357.12	1,353.25	+3.86	+0.29%	-0.1%
CDSET	1,211.07	1,211.03	+0.04	+0.00%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	79	64	138	281
A Category (Equity)	44	49	89	182
B Category (Equity)	33	10	38	81
N Category (Equity)	1	1	0	2
Z Category (Equity)	1	4	11	16
Mutual Funds	0	0	13	13
Corporate Bonds	0	0	0	0
Treasury Bonds	0	1	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,762,153	7,758,222	+0.1%
	Mn USD	70,246	70,210	
Turnover	Mn BDT	4,304	3,724	+15.6%
	Mn USD	39	34	
Volume	Mn Shares	78	76	+1.6%
No. of Trade		117,894	92,788	+27.1%

\* Average Interbank Exchange Rate is BDT 110.50 as of Oct 11, 2023

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Figure: Sectorial Turnover (BDT Mn)

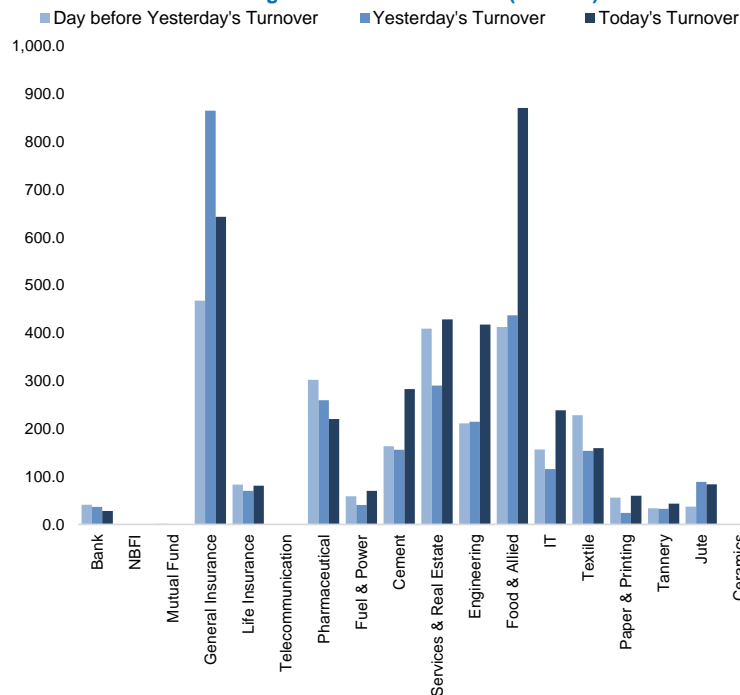
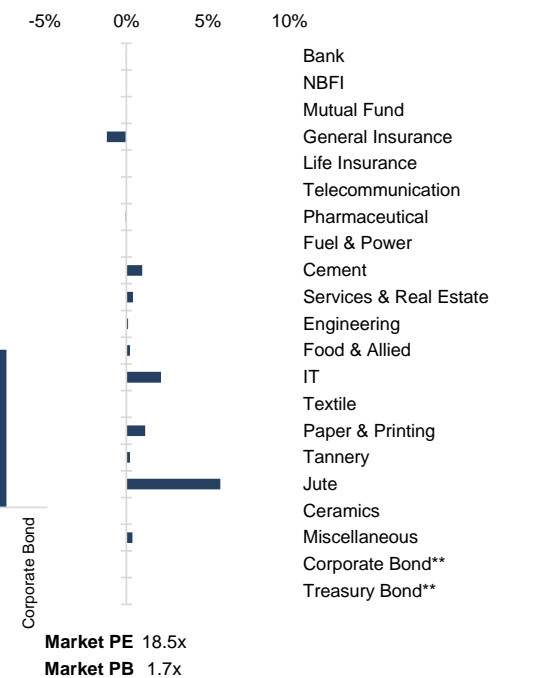


Figure: Sectorial Mcap Change



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	1,440	-0.30	-0.02%	35	679,519	8.8%	27.9	0.7%	12.0x	0.7x	GP	386,996	8.6%	0.4	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.3	0.0%	NM	18.8x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	826	826	-	-	36	37,332	0.5%	0.4	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.5	15.4x	6.2x
General Insurance	3,594	3,638	-43.55	-1.20%	42	104,843	1.4%	642.8	16.2%	19.4x	1.6x	SQURPHARMA	185,977	4.1%	14.6	9.9x	1.7x
Life Insurance	2,598	2,598	+0.34	+0.01%	15	72,630	0.9%	80.8	2.0%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.4	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,693	3,695	-1.59	-0.04%	34	716,433	9.3%	220.3	5.6%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,696	1,696	+0.24	+0.01%	23	447,295	5.8%	70.0	1.8%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,570	2,546	+24.70	+0.97%	7	123,448	1.6%	283.0	7.2%	27.2x	2.7x	LHBL	83,270	1.8%	268.0	14.1x	4.2x
Services & Real Esta	1,918	1,910	+7.82	+0.41%	8	75,781	1.0%	428.6	10.8%	23.6x	1.2x	BERGERPBL	81,351	1.8%	0.2	26.6x	5.8x
Engineering	4,488	4,483	+4.65	+0.10%	42	527,068	6.8%	417.5	10.5%	60.9x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,446	21,398	+47.38	+0.22%	21	396,830	5.1%	870.4	22.0%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,022	2,959	+62.79	+2.12%	11	39,393	0.5%	238.4	6.0%	27.6x	2.8x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,607	1,607	+0.12	+0.01%	58	168,228	2.2%	159.6	4.0%	78.4x	1.1x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	9,854	9,741	+113.04	+1.16%	6	37,968	0.5%	60.2	1.5%	36.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,159	3,152	+7.24	+0.23%	6	33,362	0.4%	43.6	1.1%	47.3x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	17,173	16,239	+934.51	+5.75%	3	4,201	0.1%	83.9	2.1%	NM	NM	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	38,955	0.9%	0.2	45.0x	22.1x
Miscellaneous	4,128	4,112	+15.66	+0.38%	14	224,753	2.9%	329.3	8.3%	15.9x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	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	+0.00%	241	3,191,852	41.4%	1.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	33.2	+9.9%	330.8	NM	8.4x
DESHBANDHU	36.8	+9.9%	175.6	NM	2.0x
MIRACLEIND	42.3	+9.6%	78.7	NM	2.4x
BDCOM	37.9	+8.0%	86.6	26.2x	2.4x
SONALIANSH	585.9	+7.5%	81.4	NM	5.1x
OIMEX	20.8	+5.6%	25.6	NM	1.9x
YPL	26.5	+5.2%	52.1	NM	5x
MEGHNACEM	62.2	+4.7%	2.1	52.8x	1.2x
INTECH	25.9	+4.4%	4.4	NM	48.9x
INTRACO	35.5	+4.1%	39.4	23.6x	2.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LIBRAINFU	1,064.5	-4.7%	34.6	NM	0.8x
APEXTANRY	103.2	-4.6%	4.3	NM	2x
CRYSTALINS	103.6	-3.8%	35.4	31.9x	4.2x
STANDARINS	44.1	-3.5%	12.3	18.5x	2.0x
MEGHNAPET	34.2	-3.4%	2.2	NM	NM
REPUBLIC	52.1	-3.2%	83.6	26.2x	3.0x
PEOPLESINS	35.2	-3.0%	7.0	13.8x	1.1x
RELIANCINS	67.4	-2.9%	17.4	13.2x	1.0x
SHYAMPSUG	136.9	-2.8%	10.2	NM	NM
NORTHRNINS	45.2	-2.8%	0.9	24.4x	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%	14.1x	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%	18.4x	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%	30.5x	12.2x
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
FUWANGFOOD	33.2	+9.9%	330.8	NM	8.4x
SEAPEARL	210.4	+0.0%	325.1	30.5x	12.2x
LHBL	71.7	+1.1%	268.0	14.1x	4.2x
GEMINISEA	824.7	+3.2%	196.9	39.3x	32.5x
DESHBANDHU	36.8	+9.9%	175.6	NM	2.0x
BSC	116.5	+2.3%	147.5	7.4x	1.5x
MONNOAGML	861.7	+3.2%	118.6	NM	4.9x
EMERALDOIL	124.6	+2.7%	103.5	NM	NM
BDCOM	37.9	+8.0%	86.6	26.2x	2.4x
REPUBLIC	52.1	-3.2%	83.6	26.2x	3.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NBL	9.1	9.1	1.0	5,000	45.50
SEAPEARL	224.0	191.9	9.0	225	43.94
EMERALDOIL	121.0	110.0	12.0	308	34.64
SONALIPAPR	661.2	569.0	24.0	49	29.67
BRACBANK	33.1	32.9	5.0	581	19.17
POWERGRID	47.2	47.2	1.0	400	18.88
KBPPWBIL	26.0	26.0	2.0	500	13.00
BSCCL	237.0	237.0	1.0	50	11.85
DAFODILCOM	91.9	88.3	2.0	100	9.14
KDSALTD	76.9	70.0	2.0	116	8.15

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
NBL	9.1	9.1	45.5	5,000	1
SEAPPEARL	224.0	191.9	43.9	225	9
EMERALDOIL	121.0	110.0	34.6	308	12
SONALIPAPR	661.2	569.0	29.7	49	24
BRACBANK	33.1	32.9	19.2	581	5
POWERGRID	47.2	47.2	18.9	400	1
KBPPWBIL	26.0	26.0	13.0	500	2
BSCCL	237.0	237.0	11.9	50	1
DAFODILCOM	91.9	88.3	9.1	100	2
KDSALTD	76.9	70.0	8.2	116	2
LHBL	68.9	68.9	6.9	100	1
SHYAMPSUG	142.0	142.0	6.3	44	3
RENATA	1,141.8	1,141.8	5.7	5	1
REPUBLIC	57.0	48.5	5.3	107	3
GEMINISEA	814.0	773.0	4.8	6	3
NITOLINS	44.7	44.7	4.5	100	1
BEXIMCO	122.2	104.1	4.2	38	2
BBSCABLES	45.0	45.0	4.1	92	1
PRAGATIINS	69.0	69.0	4.1	60	2
PROVATIINS	63.0	61.0	3.9	63	2
AIL	73.0	73.0	3.7	50	3
APEXFOODS	330.0	330.0	3.3	10	1
<b>Total</b>			<b>345.6</b>		<b>139</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
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
MONNOAGML		32.0%	3%	Record Date	1-Nov-23
APEXTANRY		0.0%	5%	Record Date	7-Nov-23
EGEN		0.0%	10%	Record Date	8-Nov-23

#### Important DSE News

##### APEXTANRY

The Board of Directors has recommended 5% Cash Dividend for the year ended June 30, 2023. Date of AGM: 11.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record date: 07.11.2023. The Company has also reported EPS of Tk. (8.17), NAV per share of Tk. 54.85 and NOCFPS of Tk. 5.38 for the year ended June 30, 2023 as against Tk. 0.82, Tk. 63.39 and Tk. 6.62 respectively for the year ended June 30, 2022.

##### MONNOAGML

The Board of Directors has recommended 3% Cash and 32% Stock dividend for the year ended June 30, 2023. Date of AGM: 29.11.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 01.11.2023. The Company has also reported EPS of Tk. 2.90, NAV per share of Tk. 174.39 and NOCFPS of Tk. (3.11) for the year ended June 30, 2023 as against Tk. 1.59, Tk. 173.97 and Tk. (3.67) respectively for the year ended June 30, 2022. Reasons for deviation in EPS, NAVPS and NOCFPS: Revenue of the Company has increased, as such, the Net Profit after Tax has also increased. Therefore, EPS has increased from the last year. The net profit of the Company has increased during the year which result in the increase of the NAV per share from the last year. Cash Flow of the Company has increased due to cash receipts from customers. Prior year tax adjustment incurred during the year causes NOCFPS negative. Disclosures on recommendation of stock dividend: 1) The Bonus shares will be entitled to modernization and utilization of such retained amount as capital of the company. 2) The bonus Share has been declared out of accumulated Profit. 3) The company has not declared Bonus shares from capital reserve or revaluation reserve or any unrealized gain.

##### ROBI

The Company has informed that Mr. Vivek Sood has been appointed as Chairman and Mr. Rajeev Sethi has been appointed as Managing Director of the company.

##### SHAHJABANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Shahjalal Islami Bank PLC.' instead of 'Shahjalal Islami Bank Limited' with effect from October 12, 2023. Other things (except name) will remain unchanged.

##### FIRSTSBANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'First Security Islami Bank PLC.' instead of 'First Security Islami Bank Limited' with effect from October 12, 2023. Other things (except name) will remain unchanged.

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