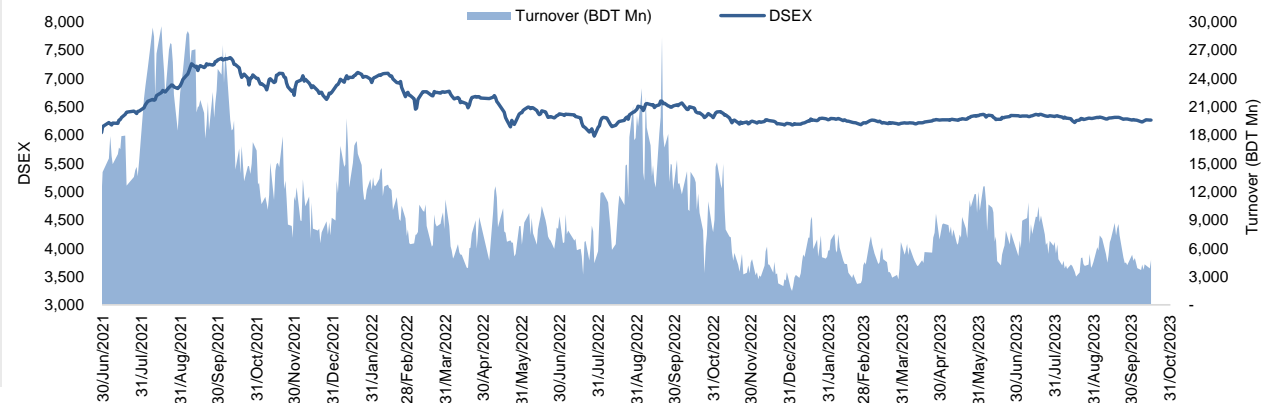


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 2 points and closed at 6,265.16. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (+0.13%), and the large-cap index CDSET (+0.01%) closed at 2,136.44, 1,358.75, and 1,211.56 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.25% followed by Engineering (+0.12%), Pharmaceutical (+0.08%), Fuel & Power (+0.01%). Bank experienced the highest loss of 0.01% followed by Telecommunication (0.00%), NBFI (0.00%). Block trades contributed 7.4% of the overall market turnover. Gemini Sea Food Ltd. (+3.6%) was the most traded share with a turnover of BDT 261 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,265.16	6,263.15	+2.00	+0.03%	+0.9%
DS30	2,136.44	2,138.89	-2.45	-0.11%	-2.7%
DSES	1,358.75	1,356.98	+1.77	+0.13%	-0.0%
CDSET	1,211.56	1,211.49	+0.07	+0.01%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	66	78	175	319
A Category (Equity)	36	58	115	209
B Category (Equity)	26	17	49	92
N Category (Equity)	0	2	0	2
Z Category (Equity)	4	1	11	16
Mutual Funds	0	1	14	15
Corporate Bonds	1	0	2	3
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,768,979	7,769,235	-0.0%
	Mn USD	70,307	70,310	
Turnover	Mn BDT	4,761	3,874	+22.9%
	Mn USD	43	35	
Volume	Mn Shares	74	74	+0.5%
No. of Trade		118,814	102,770	+15.6%

* Average Interbank Exchange Rate is BDT 110.50 as of Oct 16, 2023

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Billal Hossain Research Associate (880) 1708805229 billal.hossain@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

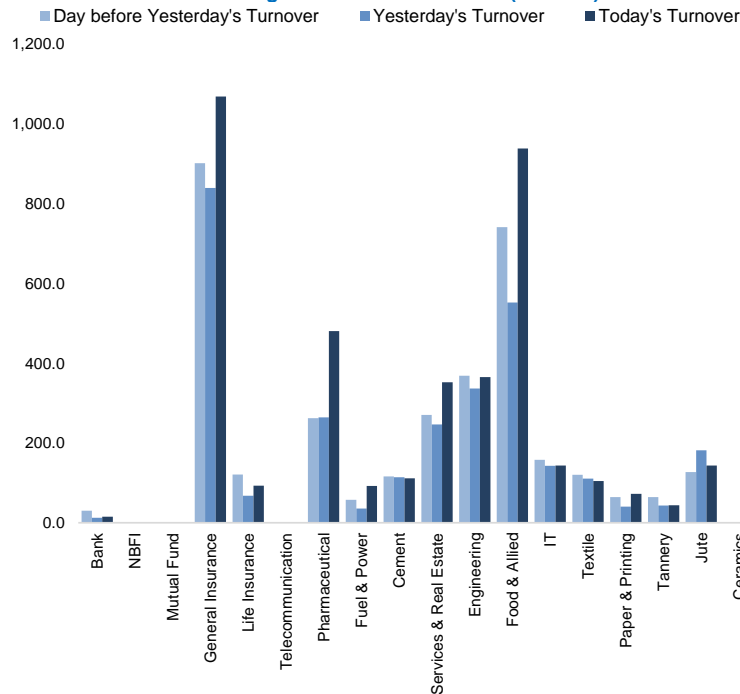
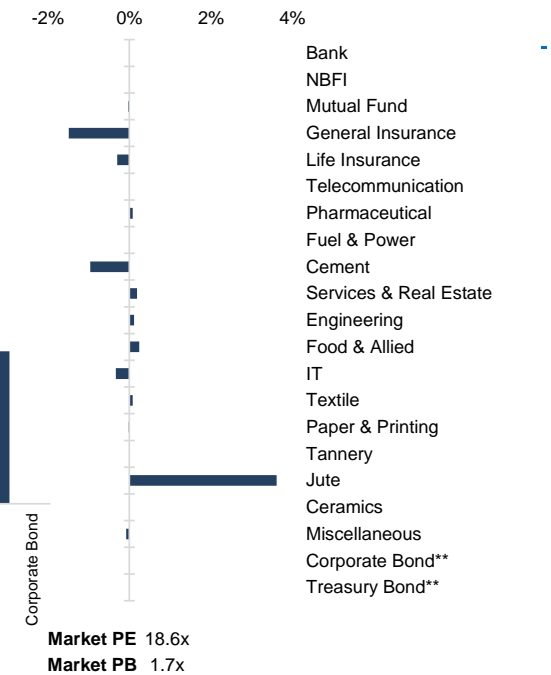


Figure: Sectorial Mcap Change



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	45,253	45,255	-2.67	-0.01%	35	680,246	8.8%	14.9	0.3%	12.0x	0.7x	GP	386,996	8.6%	0.2	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	0.2	0.0%	NM	18.8x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	825	826	-0.24	-0.03%	36	37,330	0.5%	0.6	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.0	15.4x	6.2x
General Insurance	3,649	3,704	-55.01	-1.49%	42	106,450	1.4%	1,069.1	24.2%	19.7x	1.7x	SQURPHARMA	186,155	4.1%	147.6	9.9x	1.7x
Life Insurance	2,609	2,617	-7.77	-0.30%	15	72,922	0.9%	93.3	2.1%	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%	0.3	38.0x	4.6x
Pharmaceutical	3,702	3,699	+3.04	+0.08%	34	718,135	9.3%	480.6	10.9%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,696	1,696	+0.21	+0.01%	23	447,390	5.8%	92.1	2.1%	30.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,547	2,572	-24.67	-0.96%	7	122,334	1.6%	111.7	2.5%	27.0x	2.6x	BERGERPBL	83,466	1.8%	7.7	27.3x	6.0x
Services & Real Esta	1,901	1,897	+3.60	+0.19%	8	75,097	1.0%	352.4	8.0%	22.9x	1.2x	LHBL	82,458	1.8%	93.4	14.0x	4.2x
Engineering	4,494	4,489	+5.24	+0.12%	42	527,851	6.8%	365.2	8.3%	40.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,496	21,443	+52.85	+0.25%	21	397,755	5.2%	938.2	21.3%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	2,976	2,986	-9.83	-0.33%	11	38,801	0.5%	143.8	3.3%	27.2x	2.8x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,608	1,607	+1.36	+0.08%	58	168,362	2.2%	104.6	2.4%	88.1x	1.1x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	9,860	9,862	-1.46	-0.01%	6	37,990	0.5%	72.8	1.6%	36.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,166	3,166	+0.20	+0.01%	6	33,438	0.4%	44.1	1.0%	47.4x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	18,945	18,284	+660.67	+3.61%	3	4,634	0.1%	143.8	3.3%	NM	NM	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	38,903	0.9%	1.2	45.0x	22.1x
Miscellaneous	4,165	4,168	-3.17	-0.08%	14	226,782	2.9%	382.2	8.7%	15.9x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.00	+0.00%	10	35,144	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.01	+0.01%	241	3,190,803	41.3%	0.2	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	31.9	+10.0%	127.3	NM	2.7x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	GEMINISEA	842.8	+3.6%	261.4	40.2x	33.2x
DESHBANDHU	40.9	+9.4%	163.0	NM	2.2x	BATBC	74,086	4.3%	15.4x	6.2x	SEAPEARL	207.5	+1.3%	257.7	30.1x	12.0x
FINEFOODS	133.7	+8.8%	146.6	NM	12.7x	BEXIMCO	69,196	4.0%	12.0x	1.2x	UNIONINS	69.1	-5.3%	235.8	28.1x	3.8x
MIRACLEIND	41.3	+8.1%	60.3	NM	2.4x	RENATA	68,042	3.9%	38.0x	4.6x	FUWANGFOOD	32.6	+4.2%	207.7	NM	8.2x
OIMEX	23.0	+6.5%	54.3	NM	2.1x	BXPHARMA	45,564	2.6%	14.6x	1.5x	EASTERNINS	65.5	+3.8%	167.2	21.1x	1.2x
EASTRNLUB	1,886.7	+6.2%	38.5	NM	10.7x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	DESHBANDHU	40.9	+9.4%	163.0	NM	2.2x
LIBRAINFU	1,191.4	+6.2%	20.7	NM	1x	GP	38,700	2.2%	11.9x	7.3x	SQURPHARMA	210.0	+0.0%	147.6	9.9x	1.7x
RENWICKJA	801.8	+5.9%	3.7	NM	NM	BRACBANK	30,964	1.8%	8.3x	0.9x	FINEFOODS	133.7	+8.8%	146.6	NM	12.7x
CENTRALPHL	12.7	+5.8%	24.9	NM	2.2x	ISLAMIBANK	29,927	1.7%	8.4x	0.7x	SONALIANSH	665.7	+4.2%	142.9	NM	5.8x
IMAMBUTTON	156.7	+5.6%	17.3	NM	32.6x	LHBL	28,562	1.6%	14.0x	4.2x	KBPPWBIL	31.9	+10.0%	127.3	NM	2.7x
						PUBALIBANK	19,162	1.1%	4.5x	0.6x						
						NBL	19,116	1.1%	NM	0.8x						
						CITYBANK	18,190	1.0%	5.5x	0.7x						
						OLYMPIC	16,066	0.9%	18.8x	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%	9.2x	0.6x						
						SEAPEARL	13,733	0.8%	30.1x	12.0x						
						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.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	199.7	189.0	110.0	571	19
AIL	76.5	74.2	34.8	458	7
FINEFOODS	129.1	121.0	33.9	277	10
EMERALDOIL	114.9	111.0	17.9	158	9
GEMINISEA	849.9	795.0	12.8	16	6
DESHBANDHU	38.7	36.9	12.1	316	3
HRTEX	120.0	119.9	11.2	94	4
BEXIMCO	109.9	104.1	9.6	91	4
BXPHARMA	131.8	131.6	7.1	54	10
ADNTEL	125.0	121.0	6.7	54	2
KDSALTD	69.3	69.3	6.6	96	2
CRYSTALINS	112.0	93.8	6.2	65	2
AOL	32.9	32.9	6.2	187	5
SONALIPAPR	659.1	570.0	5.9	10	10
FORTUNE	75.7	75.6	5.1	67	2
PRIMEINSUR	82.0	82.0	4.4	54	1
UNIONINS	79.2	68.0	4.2	60	2
PTL	80.1	69.3	4.2	57	4
SONALIANSH	639.0	592.0	3.0	5	3
RUPALILIFE	101.0	101.0	2.6	26	1
EBL	29.0	28.1	2.5	86	3
NBL	8.1	8.1	2.4	300	3
Total			350.7		164

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MATINSPINN		0.0%	40%	Record Date	7-Nov-23
BSC		0.0%	25%	Record Date	7-Nov-23
EGEN		0.0%	10%	Record Date	8-Nov-23
BSRMSTEEL		0.0%	25%	Record Date	8-Nov-23
BSRMLTD		0.0%	25%	Record Date	8-Nov-23

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Important DSE News

DESCO

The Board of Directors has recommended 10% cash dividend for the ordinary shareholders except sponsor shareholder for the year ended June 30, 2023. Record Date: 23.11.2023. Date of AGM will be notified later. The Company has also reported EPS of Tk. (13.61), NAV per share of Tk. 50.62 and NOCFPS of Tk. 8.72 for the year ended June 30, 2023 as against Tk. 1.59, Tk. 65.96 and Tk. 13.09 respectively for the year ended June 30, 2022. The company has further informed the following: Quantity of shares of sponsor: 26,89,88,757 shares. Quantity of shares of Ordinary Shareholders: 12,85,81,047 shares. Dividend payable to Ordinary Shareholders: Tk. 12,85,81,047.00

MATINSPINN

The Board of Directors has recommended 40% Cash dividend for the year ended June 30, 2023. Date of AGM: 30.11.2023, Time: 11:30 AM, Venue: Digital Platform. Record Date: 07.11.2023. The Company has reported EPS of Tk. 4.38, NAV per share of Tk. 60.04 and NOCFPS of Tk. 4.97 for the year ended June 30, 2023 as against Tk. 10.79, Tk. 60.63 and Tk. 6.17 respectively for the year ended June 30, 2022.

LANKABAFIN

The company has informed that the Board of Directors of the company has decided to sell out its property situated at plot # 23 and 24, Tejgaon Industrial Area, Dhaka along with the under construction multi-storied building (4 basements + ground floor + 11 floors) at a prevailing market price, subject to approval of the regulatory authorities.

BSC

The Board of Directors has recommended 25% Cash Dividend for the year ended June 30, 2023. Date of AGM: 16.11.2023, Time: 11:00 AM, Venue: Radisson Blu Hotel, Chattogram Bay View, Chattogram. Record date: 07.11.2023. The Corporation has also reported EPS of Tk. 16.15, NAV per share of Tk. 86.67 and NOCFPS of Tk. 22.62 for the year ended June 30, 2023 as against Tk. 14.80 Tk. 72.52 and Tk. 23.87 respectively for the year ended June 30, 2022.