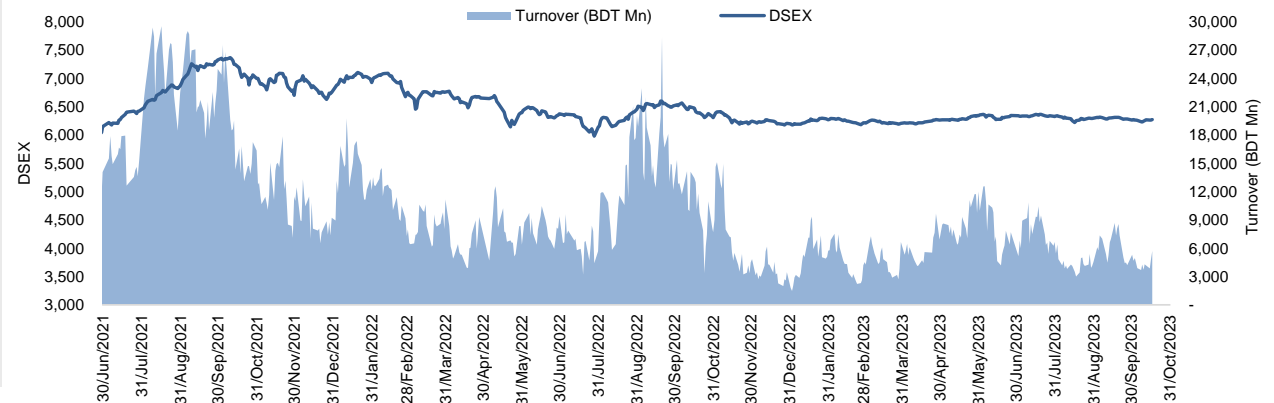


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 8.56 points and closed at 6,273.71. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.26%), and the large-cap index CDSET (+0.07%) closed at 2,138.25, 1,362.32, and 1,212.36 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.30% followed by Food & Allied (+0.18%), Bank (+0.10%), Fuel & Power (+0.07%). Engineering experienced the highest loss of 0.02% followed by Telecommunication (0.00%), NBFI (+0.00%). Block trades contributed 13.6% of the overall market turnover. Gemini Sea Food Ltd. (-4.5%) was the most traded share with a turnover of BDT 283 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,273.71	6,265.16	+8.56	+0.14%	+1.1%
DS30	2,138.25	2,136.44	+1.81	+0.08%	-2.6%
DSES	1,362.32	1,358.75	+3.57	+0.26%	+0.3%
CDSET	1,212.36	1,211.56	+0.80	+0.07%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	78	67	171	316
A Category (Equity)	41	51	109	201
B Category (Equity)	32	13	48	93
N Category (Equity)	1	1	1	3
Z Category (Equity)	4	2	13	19
Mutual Funds	1	1	14	16
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,776,824	7,768,979	+0.1%
	Mn USD	70,378	70,307	
Turnover	Mn BDT	5,722	4,761	+20.2%
	Mn USD	52	43	
Volume	Mn Shares	93	74	+26.0%
No. of Trade		138,635	118,814	+16.7%

\* Average Interbank Exchange Rate is BDT 110.50 as of Oct 17, 2023

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

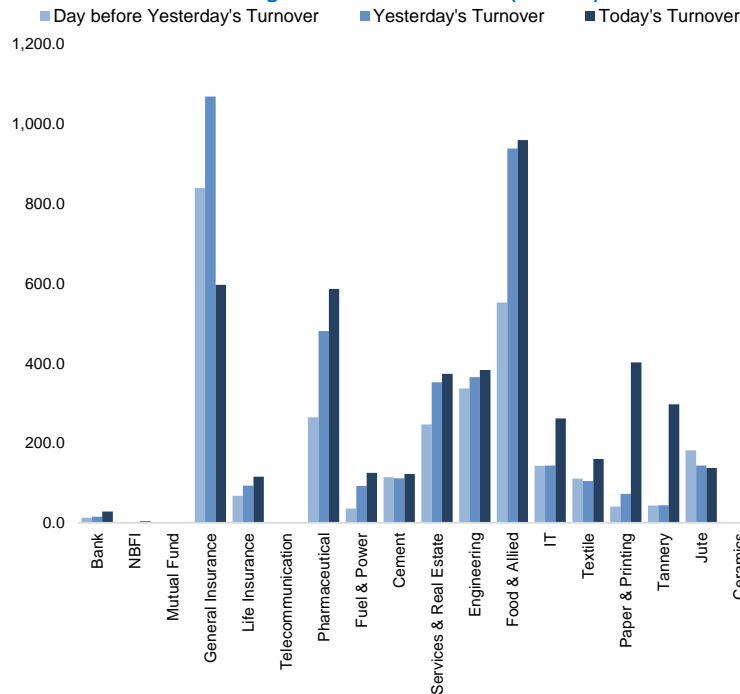
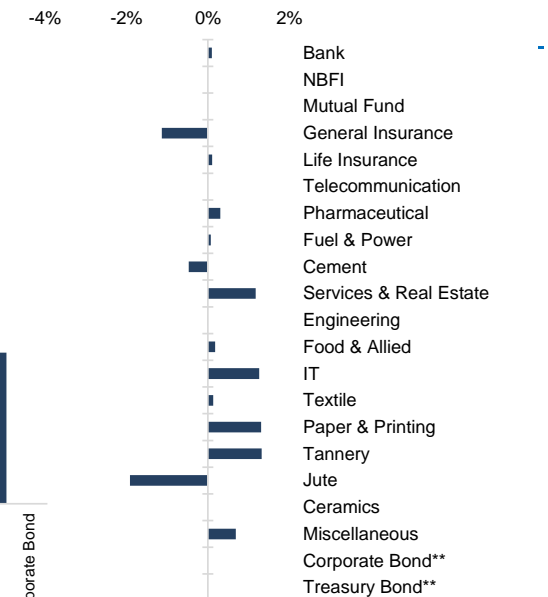


Figure: Sectorial Mcap Change



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	1,443	1,442	+1.40	+0.10%	35	680,907	8.8%	28.2	0.6%	12.1x	0.7x	GP	386,996	8.5%	0.7	11.9x	7.3x
NBFI	1,917	1,917	+0.00	+0.00%	23	186,520	2.4%	3.3	0.1%	NM	19.2x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	825	825	-0.04	-0.01%	36	37,328	0.5%	1.1	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.0	15.4x	6.2x
General Insurance	3,608	3,649	-41.25	-1.13%	42	105,246	1.4%	596.6	12.1%	19.5x	1.6x	SQURPHARMA	186,155	4.1%	15.6	9.9x	1.7x
Life Insurance	2,612	2,609	+2.80	+0.11%	15	73,001	0.9%	115.7	2.3%	NM	NM	ROBI	157,138	3.5%	0.2	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.8	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,713	3,702	+11.22	+0.30%	34	720,312	9.3%	586.2	11.9%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,697	1,696	+1.17	+0.07%	23	447,698	5.8%	125.1	2.5%	30.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,535	2,547	-11.92	-0.47%	7	121,762	1.6%	122.6	2.5%	26.8x	2.6x	BERGERPBL	84,607	1.9%	18.7	27.6x	6.1x
Services & Real Esta	1,923	1,901	+22.30	+1.17%	8	75,978	1.0%	373.7	7.6%	23.1x	1.2x	LHBL	81,412	1.8%	90.3	13.8x	4.1x
Engineering	4,494	4,494	-0.76	-0.02%	42	527,762	6.8%	382.9	7.8%	40.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,534	21,496	+37.77	+0.18%	21	398,454	5.2%	959.3	19.4%	20.1x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,014	2,976	+37.41	+1.26%	11	39,289	0.5%	261.9	5.3%	27.5x	2.8x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,610	1,608	+2.13	+0.13%	58	168,586	2.2%	160.1	3.2%	88.3x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	9,989	9,860	+129.06	+1.31%	6	38,487	0.5%	402.1	8.2%	37.1x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,208	3,166	+41.76	+1.32%	6	33,879	0.4%	297.0	6.0%	48.1x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	18,583	18,945	-361.84	-1.91%	3	4,546	0.1%	137.1	2.8%	NM	NM	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.2	0.0%	53.4x	1.9x	UNILEVERCL	38,975	0.9%	0.1	45.1x	22.2x
Miscellaneous	4,194	4,165	+28.57	+0.69%	14	228,338	3.0%	378.7	7.7%	16.1x	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	3,190,644	41.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KOHINOOR	501.1	+8.7%	153.6	43.9x	8.8x
KBPPWBIL	34.4	+7.8%	144.1	NM	2.9x
KPPL	11.1	+7.8%	25.5	NM	NM
SHYAMPSUG	148.7	+7.2%	9.5	NM	NM
APEXFOOT	312.3	+7.0%	263.0	24.3x	1.3x
LIBRAINFU	1,265.8	+6.2%	5.0	NM	1.0x
NFML	15.7	+6.1%	20.6	82.6x	1x
MONOSPOOL	275.7	+6.0%	46.8	36.6x	5.7x
PREMIERCEM	57.0	+5.9%	8.4	NM	0.9x
IMAMBUTTON	165.2	+5.4%	25.9	NM	34.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AMBEEPHA	884.4	-4.9%	29.2	NM	46.5x
RENWICKJA	764.4	-4.7%	2.4	NM	NM
MIRACLEIND	39.4	-4.6%	61.7	NM	2.3x
GEMINISEA	804.5	-4.5%	283.1	38.4x	31.7x
BENGALWTL	24.2	-3.6%	23.5	49.4x	0.9x
FUWANGFOOD	31.6	-3.1%	228.4	NM	8.0x
ARAMIT	297.5	-2.8%	24.8	50.2x	2.1x
CONTININS	38.6	-2.8%	19.2	64.3x	1.8x
AGRANINS	38.7	-2.5%	7.8	19.5x	1.8x
EASTLAND	27.9	-2.4%	2.5	17.3x	1.3x

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%	4.5x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	19.1x	3.2x
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%	30.8x	12.3x
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
GEMINISEA	804.5	-4.5%	283.1	38.4x	31.7x
APEXFOOT	312.3	+7.0%	263.0	24.3x	1.3x
SONALIPAPR	615.1	-	251.1	65.8x	3.6x
SEAPEARL	212.6	+2.5%	249.1	30.8x	12.3x
FUWANGFOOT	31.6	-3.1%	228.4	NM	8.0x
KOHINOOR	501.1	+8.7%	153.6	43.9x	8.8x
KBPPWBIL	34.4	+7.8%	144.1	NM	2.9x
DESHBANDHU	39.9	-2.4%	140.0	NM	2.2x
SONALIANSH	649.6	-2.4%	136.4	NM	5.6x
ORIONINFU	334.9	+2.7%	128.6	NM	24.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DAFODILCOM	91.0	91.0	1.0	2,000	182.00
EBL	29.4	29.4	4.0	5,000	147.00
TRUSTBANK	31.5	31.5	2.0	4,400	138.60
SEAPEARL	202.1	189.8	13.0	410	79.55
SONALIPAPR	660.0	570.0	39.0	99	60.61
KBPPWBIL	30.5	29.0	10.0	588	17.55
KDSALTD	76.9	69.3	4.0	214	15.97
BRACBANK	33.9	33.0	16.0	366	12.11
SONALIANSH	650.1	625.0	7.0	18	11.38
RENATA	1,200.0	1,141.8	4.0	7	8.05

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DAFODILCOM	91.0	91.0	182.0	2,000	1
EBL	29.4	29.4	147.0	5,000	4
TRUSTBANK	31.5	31.5	138.6	4,400	2
SEAPPEARL	202.1	189.8	79.6	410	13
SONALIPAPR	660.0	570.0	60.6	99	39
KBPPWBIL	30.5	29.0	17.5	588	10
KDSALTD	76.9	69.3	16.0	214	4
BRACBANK	33.9	33.0	12.1	366	16
SONALIANSH	650.1	625.0	11.4	18	7
RENATA	1,200.0	1,141.8	8.0	7	4
CNATEX	9.7	9.2	7.2	766	9
RDFOOD	37.0	37.0	7.0	188	2
PARAMOUNT	65.8	65.8	5.9	90	1
GP	270.0	261.6	5.8	22	7
GENEXIL	77.9	77.9	5.2	67	1
ROBI	27.2	27.0	5.0	184	3
PIONEERINS	70.0	70.0	3.5	50	1
SALVOCHEM	67.7	58.5	3.3	53	3
UNIONINS	75.9	72.0	2.8	37	3
DESHBANDHU	39.7	38.7	2.3	60	2
BSRMLTD	81.0	81.0	2.1	26	4
WALTONHIL	993.0	983.0	2.1	2	2
<b>Total</b>			<b>776.8</b>		<b>206</b>

#### 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

#### Important DSE News

##### CAPITECGBF

Trading of the units of Capitec Grameen Bank Growth Fund will commence at DSE from today i.e. October 17, 2023 under 'A' category. DSE Trading Code for Capitec Grameen Bank Growth Fund is "CAPITECGBF" and DSE Company Code is 12205.

Net Asset Value (NAV) of Capitec Grameen Bank Growth Fund at cost price is BDT 1,558,243,223.80 and Net Asset Value (NAV) per Unit at cost price is BDT 10.01 as on 12 October 2023 which is also same i.e., BDT 10.01 at market price per unit as on 12 October 2023. Total number of units is 155,680,000 as on 12 October 2023.

##### MIDASFIN

**(Q1 Un-audited):** Consolidated EPS was Tk. (1.83) for January-March 2023 as against Tk. (1.21) for January-March 2022. Consolidated NOCFPS was Tk. 0.61 for January-March 2023 as against Tk. 0.50 for January-March, 2022. Consolidated NAV per share was Tk. 9.77 as on March 31, 2023 and Tk. 11.60 as on December 31, 2022.

**(Q2 Un-audited):** Consolidated EPS was Tk. (1.14) for April-June 2023 as against Tk. (0.44) (restated) for April-June 2022; Consolidated EPS was Tk. (2.97) for January-June 2023 as against Tk. (1.65) (restated) for January-June 2022. Consolidated NOCFPS was Tk. 0.62 for January-June 2023 as against Tk. 0.34 (restated) for January-June 2022. Consolidated NAV per share was Tk. 8.63 as on June 30, 2023 and Tk. 11.60 (restated) as on December 31, 2022.

The Board of Directors has recommended 1.5% Cash Dividend for the year ended December 31, 2022. Date of AGM: 22.11.2023, Time: 10:30 AM, Venue: Digital Platform. Record Date: 07.11.2023. The Company has also reported Consolidated EPS of Tk. 0.06, Consolidated NAV per share of Tk. 11.60 and Consolidated NOCFPS of Tk. (3.85) for the year ended December 31, 2022 as against Tk. 0.59 (restated), Tk. 11.64 (restated) and Tk. 1.31 (restated) respectively for the year ended December 31, 2021. The Board has also decided to open Shariah based Islamic Financing Wing of the company and amend the relevant clauses of the Memorandum and Articles of Association of the Company, subject to the approval of the shareholders and regulatory authorities.

**(Q3 Un-audited):** Consolidated EPS was Tk. (0.85) for July-September 2023 as against Tk. (0.66) (restated) for July-September 2022; Consolidated EPS was Tk. (3.82) for January-September 2023 as against Tk. (2.31) (restated) for January-September 2022. Consolidated NOCFPS was Tk. 1.49 for January-September 2023 as against Tk. (2.59) (restated) for January-September 2022. Consolidated NAV per share was Tk. 7.78 as on September 30, 2023 and Tk. 11.60 (restated) as on December 31, 2022.

##### NCCBANK

Mr. M. A. Quasem, one of the Sponsors of the company, has expressed his intention to sell 1,40,000 shares out of his holding of 50,40,000 shares of the Company at prevailing market price (In the Public/Block Market) through Dhaka Stock Exchange Limited (DSE) within October 31, 2023.

##### OIMEX

Refer to their earlier news disseminated by DSE on 05.10.2023 regarding raising paid-up capital of the company, the company has further informed that the said share money deposit BDT 60,000,000.00 had been collected for the payment of bank liability of Islami Bank Bangladesh Limited, Elephant Road Branch, Dhaka and the fund has already been fully utilized.

##### DESHBANDHU

The Board of Directors has authorized the Managing Director to take all necessary steps and to appoint an auditor for carrying out the revaluation of assets of the Transferor Companies i.e., Deshbandhu Sugar Mills, Deshbandhu Food & Beverage and Deshbandhu Packaging and transferee Company Deshbandhu Polymer Limited and determine NAV per share for consideration in the Merger Scheme (acquisition of Shares through capital restructuring). The Board has authorized the Additional Managing Director & Group CFO of Deshbandhu Group to carry out a detailed feasibility study and prepare a draft scheme for the merger of the Transferor Companies to transferee Deshbandhu Polymer Limited.

##### WALTONHIL

The Company has informed that Mr. S M Shamsul Alam has been appointed as the Chairman and Mr. S M Mahbulul Alam has been appointed as the Managing Director of the company.

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