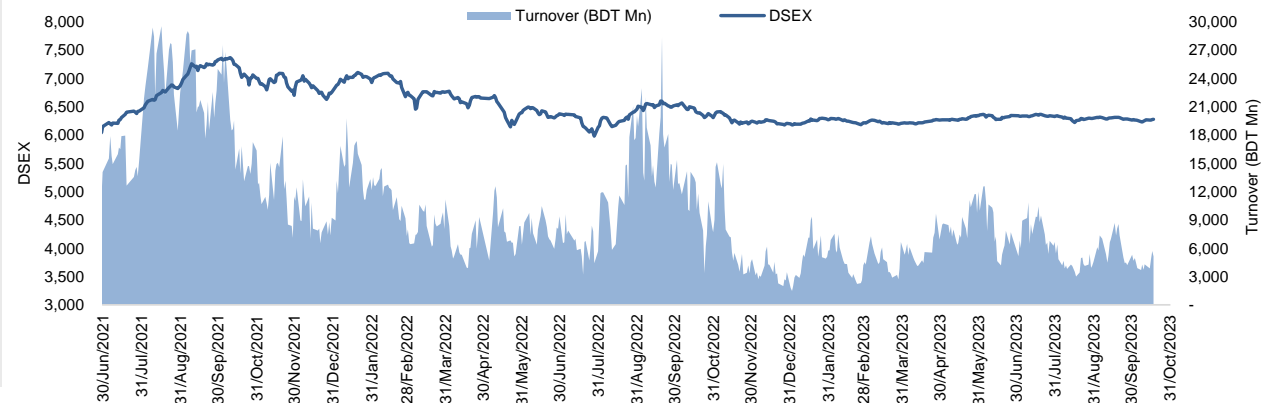


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.08%) gained 4.8 points and closed at 6,278.51. The blue-chip index DS30 (+0.05%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (+0.00%) closed at 2,139.23, 1,362.41, and 1,212.37 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.06% followed by Pharmaceutical (+0.03%), Fuel & Power (+0.02%), Engineering (+0.02%). Food & Allied experienced the highest loss of 0.17% followed by Telecommunication (0.00%), NBF (0.00%). Block trades contributed 13.3% of the overall market turnover. Sonali Paper & Board Mills Ltd. (+0.1%) was the most traded share with a turnover of BDT 405 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,278.51	6,273.71	+4.80	+0.08%	+1.2%
DS30	2,139.23	2,138.25	+0.98	+0.05%	-2.6%
DSES	1,362.41	1,362.32	+0.09	+0.01%	+0.3%
CDSET	1,212.37	1,212.36	+0.01	+0.00%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	85	63	153	301
A Category (Equity)	67	29	99	195
B Category (Equity)	16	28	42	86
N Category (Equity)	2	0	1	3
Z Category (Equity)	0	6	11	17
Mutual Funds	4	0	12	16
Corporate Bonds	0	0	1	1
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,818,632	7,776,824	+0.5%
	Mn USD	70,757	70,378	
Turnover	Mn BDT	5,122	5,722	-10.5%
	Mn USD	46	52	
Volume	Mn Shares	72	93	-23.4%
No. of Trade		122,761	138,635	-11.5%

* Average Interbank Exchange Rate is BDT 110.50 as of Oct 18, 2023

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Figure: Sectorial Turnover (BDT Mn)

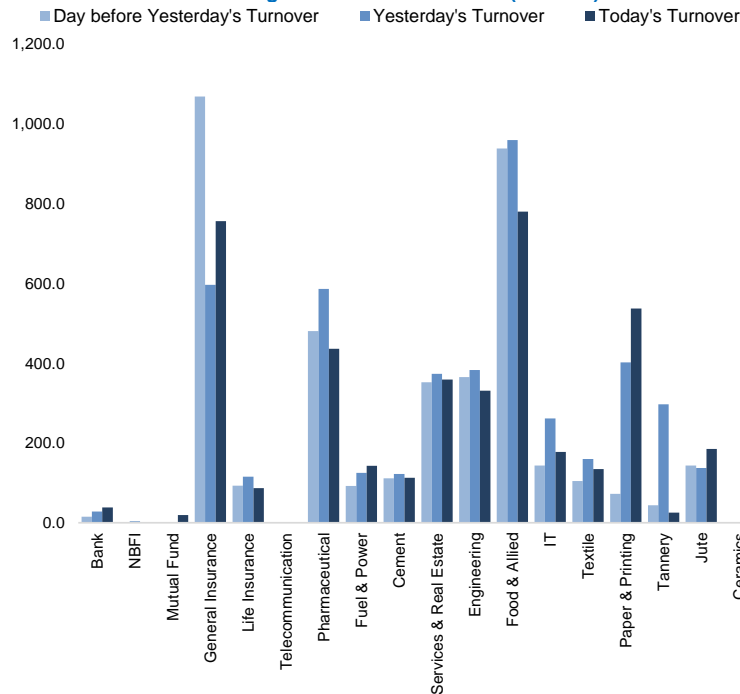
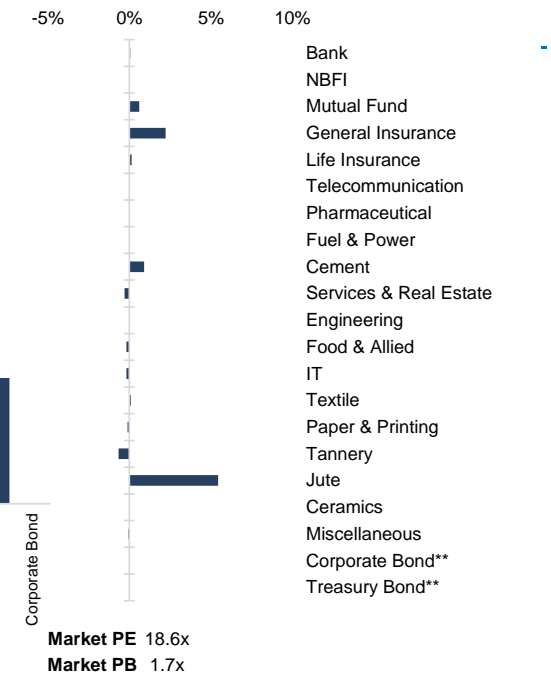


Figure: Sectorial Mcap Change



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	45,323	45,297	+26.55	+0.06%	35	681,306	8.8%	38.3	0.9%	12.1x	0.7x	GP	386,996	8.5%	0.1	11.9x	7.3x
NBFI	1,917	1,917	+0.00	+0.00%	23	186,520	2.4%	1.9	0.0%	NM	19.7x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	830	825	+4.97	+0.60%	37	39,275	0.5%	19.1	0.4%	NM	0.8x	BATBC	280,098	6.2%	0.0	15.4x	6.2x
General Insurance	3,688	3,608	+80.30	+2.23%	42	107,589	1.4%	756.5	17.0%	20.0x	1.7x	SQURPHARMA	186,421	4.1%	126.5	9.9x	1.7x
Life Insurance	2,616	2,612	+3.88	+0.15%	15	73,109	0.9%	86.6	1.9%	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	3,714	3,713	+1.06	+0.03%	34	720,517	9.3%	435.9	9.8%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,698	1,697	+0.35	+0.02%	23	447,791	5.8%	143.0	3.2%	30.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,558	2,535	+22.96	+0.91%	7	122,864	1.6%	113.0	2.5%	27.1x	2.7x	BERGERPBL	84,445	1.9%	6.2	27.6x	6.1x
Services & Real Esta	1,917	1,923	-5.69	-0.30%	8	75,574	1.0%	358.8	8.1%	23.1x	1.2x	LHBL	81,645	1.8%	74.5	13.9x	4.1x
Engineering	4,495	4,494	+0.90	+0.02%	42	527,868	6.8%	331.1	7.5%	40.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,497	21,534	-36.72	-0.17%	21	397,774	5.1%	780.4	17.6%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,008	3,014	-5.45	-0.18%	11	39,218	0.5%	177.7	4.0%	27.5x	2.8x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,612	1,610	+1.39	+0.09%	58	168,731	2.2%	134.3	3.0%	88.3x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	9,979	9,989	-10.46	-0.10%	6	38,447	0.5%	537.0	12.1%	37.1x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,187	3,208	-21.12	-0.66%	6	33,656	0.4%	25.4	0.6%	47.7x	3.2x	DUTCHBANGL	44,203	1.0%	0.2	7.9x	1.0x
Jute	19,594	18,583	+1010.73	+5.44%	3	4,793	0.1%	184.8	4.2%	NM	NM	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	1.5	0.0%	53.4x	1.9x	UNILEVERCL	39,273	0.9%	0.8	45.4x	22.3x
Miscellaneous	4,191	4,194	-2.39	-0.06%	14	228,208	3.0%	315.4	7.1%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,144	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.01	+0.01%	241	3,190,889	41.3%	0.1	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CAPITECGBF	12.1	+10.0%	6.1	NM	1.2x
GQBALLPEN	127.3	+9.7%	24.9	NM	1.1x
KAY&QUE	227.7	+8.7%	16.1	NM	4.1x
CRYSTALINS	102.8	+8.1%	61.2	31.6x	4.1x
SONALIANSH	698.1	+7.5%	183.7	NM	6.0x
EASTERNINS	70.8	+7.4%	106.3	22.8x	1.3x
CAPMIBLMF	10.6	+7.1%	9.4	NM	1x
HEIDELBCEM	251.0	+6.6%	25.8	31.5x	3.7x
UNIONINS	73.5	+6.5%	106.4	29.9x	4.0x
EASTRNLUB	2,062.3	+6.2%	80.5	NM	11.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	115.0	-6.0%	112.7	NM	NM
SHYAMPSUG	140.7	-5.4%	8.3	NM	NM
IMAMBUTTON	157.5	-4.7%	9.7	NM	32.7x
NFML	15.0	-4.5%	11.5	78.9x	1.3x
KPPL	10.7	-3.6%	14.6	NM	NM
OIMEX	21.8	-3.5%	27.2	NM	2.0x
STYLECRAFT	84.9	-3.1%	2.6	NM	5.3x
RSRMSTEEL	16.5	-2.9%	1.5	NM	0.4x
JUTESPINN	347.6	-2.6%	1.0	NM	NM
LEGACYFOOT	78.5	-2.4%	22.5	NM	8.8x

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%	13.9x	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%	18.9x	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%	30.7x	12.3x
UPGDCL	13,547	0.8%	16.7x	4.4x
PRIMEBANK	13,491	0.8%	5.3x	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
SONALIPAPR	615.8	+0.1%	404.9	65.9x	3.6x
SEAPEARL	211.8	-0.4%	285.5	30.7x	12.3x
SONALIANSH	698.1	+7.5%	183.7	NM	6.0x
GEMINISEA	796.4	-1.0%	166.6	38.0x	31.4x
KBPPWBIL	35.3	+2.6%	143.8	NM	3.0x
DESHBANDHU	41.1	+3.0%	137.0	NM	2.2x
FUWANGFOOI	30.9	-2.2%	133.9	NM	7.8x
SQURPHARMA	210.3	+0.1%	126.5	9.9x	1.7x
EMERALDOIL	115.0	-6.0%	112.7	NM	NM
UNIONINS	73.5	+6.5%	106.4	29.9x	4.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONALIPAPR	610.0	599.0	12.0	216	131.81
SQURPHARMA	227.0	210.1	3.0	555	125.83
MPETROLEUM	212.0	212.0	2.0	543	115.19
UNIONINS	75.7	69.0	9.0	598	42.59
ISLAMIINS	48.0	48.0	10.0	824	39.53
UTTARABANK	22.0	21.7	4.0	1,009	22.18
CRYSTALINS	102.0	102.0	1.0	196	19.99
AIL	80.1	79.0	5.0	210	16.69
CNATEX	10.2	9.7	15.0	1,481	14.77
NRBCBANK	16.4	16.4	1.0	603	9.89

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	610.0	599.0	131.8	216	12
SQURPHARMA	227.0	210.1	125.8	555	3
MPETROLEUM	212.0	212.0	115.2	543	2
UNIONINS	75.7	69.0	42.6	598	9
ISLAMIINS	48.0	48.0	39.5	824	10
UTTARABANK	22.0	21.7	22.2	1,009	4
CRYSTALINS	102.0	102.0	20.0	196	1
AIL	80.1	79.0	16.7	210	5
CNATEX	10.2	9.7	14.8	1,481	15
NRBCBANK	16.4	16.4	9.9	603	1
SEAPEARL	204.0	194.2	8.9	45	8
KDSALTD	77.0	76.9	8.9	116	3
AMBEEPHA	870.0	870.0	8.7	10	1
HRTEX	115.9	104.4	8.0	71	5
DESHBANDHU	39.5	37.6	7.8	204	7
CONFIDCEM	89.0	89.0	6.6	74	1
RENATA	1,151.7	1,141.8	6.5	6	11
FINEFOODS	146.9	128.0	5.9	45	2
BSRMSTEEL	63.9	63.9	4.8	75	1
GSPFINANCE	27.3	27.3	4.3	159	1
SONALIANSH	675.1	601.0	4.3	7	3
EMERALDOIL	123.0	123.0	3.9	32	1
Total			681.1		179

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MIDASFIN		0.0%	2%	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
PENINSULA		0.0%	0%	Record Date	9-Nov-23

Important DSE News

UNIONCAP

(Q3 Un-audited): Consolidated EPS was Tk. (1.42) for July-September 2023 as against Tk. (0.82) for July-September 2022; Consolidated EPS was Tk. (7.39) for January-September 2023 as against Tk. (5.46) for January-September 2022. Consolidated NOCFPS was Tk. 2.18 for January-September 2023 as against Tk. 0.61 for January-September 2022. Consolidated NAV per share was Tk. (23.25) as on September 30, 2023 and Tk. (15.86) as on December 31, 2022.

NCCBANK

Mr. Nisar Kader, one of the Sponsors of the company, has further informed that he has completed his sale of 1,50,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited (DSE) as per declaration news disseminated by DSE on 15.10.2023.

KPCL

The Company has informed that the Board of Directors of United Payra Power Ltd. (UPPL), a 35% associate company of Khulna Power Company Ltd. (KPCL), in its meeting held on 18th October 2023 has declared cash dividend of Tk. 2.00 per share of Tk. 10 each, amounting Tk. 231,770,000 (Entitlement of KPCL) based on the audited financial statements for the year ended on 30th June 2023 of UPPL.

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