

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.17%) gained 10.5 points and closed at 6,289.01. The blue-chip index DS30 (+0.06%), the Shariah-based index DSES (+0.09%), and the large-cap index CDSET (+0.10%) closed at 2,140.45, 1,363.57, and 1,213.55 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.12% followed by Pharmaceutical (+0.10%), Fuel & Power (+0.05%). Engineering experienced the highest loss of 0.04% followed by Bank (-0.01%), NBFI (0.00%). Block trades contributed 9.1% of the overall market turnover. Sonali Paper & Board Mills Ltd. (-0.1%) was the most traded share with a turnover of BDT 305 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,289.01	6,278.51	+10.50	+0.17%	+1.3%
DS30	2,140.45	2,139.23	+1.22	+0.06%	-2.5%
DSES	1,363.57	1,362.41	+1.16	+0.09%	+0.3%
CDSET	1,213.55	1,212.37	+1.18	+0.10%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	75	76	156	307
A Category (Equity)	58	39	99	196
B Category (Equity)	13	32	43	88
N Category (Equity)	2	0	0	2
Z Category (Equity)	2	5	14	21
Mutual Funds	1	3	10	14
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,821,321	7,818,632	+0.0%
	Mn USD	70,781	70,757	
Turnover	Mn BDT	5,549	5,122	+8.3%
	Mn USD	50	46	
Volume	Mn Shares	88	72	+22.7%
No. of Trade		143,253	122,761	+16.7%

* Average Interbank Exchange Rate is BDT 110.50 as of Oct 19, 2023

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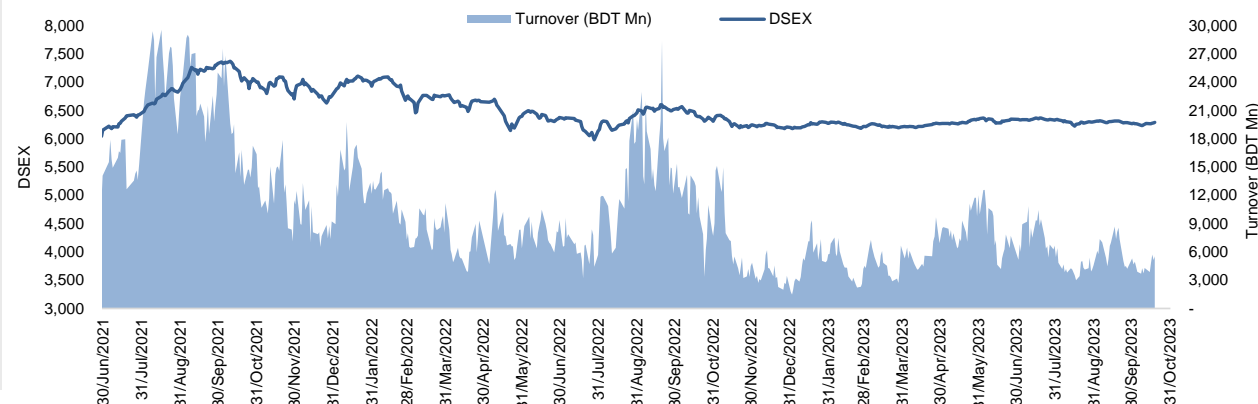


Figure: Sectorial Turnover (BDT Mn)

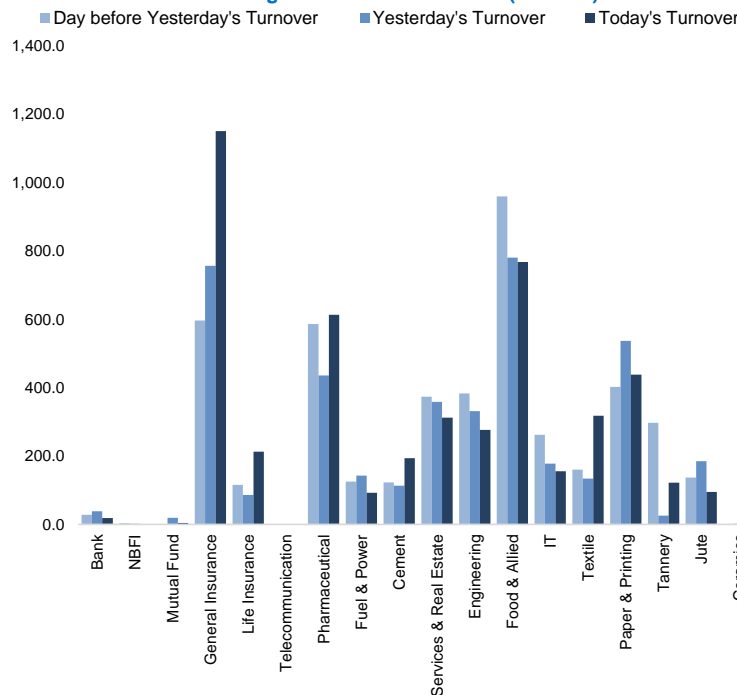
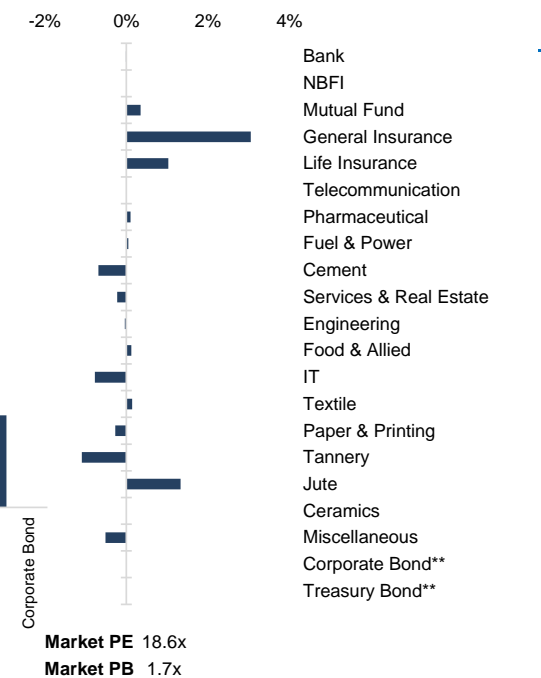


Figure: Sectorial Mcap Change



* 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	1,444	1,444	-0.18	-0.01%	35	681,221	8.8%	18.6	0.4%	11.9x	0.7x	GP	386,996	8.5%	0.0	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	1.4	0.0%	NM	19.7x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	833	830	+2.93	+0.35%	37	39,414	0.5%	4.2	0.1%	NM	0.8x	BATBC	280,098	6.2%	0.2	15.4x	6.2x
General Insurance	3,801	3,688	+112.59	+3.05%	42	110,873	1.4%	1,150.7	22.8%	20.6x	1.7x	SQURPHARMA	187,928	4.1%	105.5	10.0x	1.7x
Life Insurance	2,643	2,616	+26.99	+1.03%	15	73,863	1.0%	213.1	4.2%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.0	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,718	3,714	+3.73	+0.10%	34	721,241	9.3%	612.9	12.2%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,699	1,698	+0.88	+0.05%	23	448,022	5.8%	92.3	1.8%	30.9x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,541	2,558	-17.53	-0.69%	7	122,023	1.6%	193.6	3.8%	26.9x	2.6x	BERGERPBL	83,638	1.8%	2.4	27.3x	6.0x
Services & Real Esta	1,913	1,917	-4.26	-0.22%	8	75,585	1.0%	312.2	6.2%	23.0x	1.2x	LHBL	81,296	1.8%	168.5	13.8x	4.1x
Engineering	4,493	4,495	-1.64	-0.04%	42	527,676	6.8%	276.9	5.5%	41.9x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,524	21,497	+26.82	+0.12%	21	398,270	5.1%	768.0	15.2%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	2,985	3,008	-23.23	-0.77%	11	38,915	0.5%	155.7	3.1%	27.3x	2.8x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,614	1,612	+2.34	+0.15%	58	168,976	2.2%	318.1	6.3%	87.4x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	9,951	9,979	-27.28	-0.27%	6	38,342	0.5%	437.9	8.7%	37.0x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,152	3,187	-34.81	-1.09%	6	33,288	0.4%	122.2	2.4%	47.2x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	19,854	19,594	+260.77	+1.33%	3	4,857	0.1%	95.0	1.9%	NM	NM	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	1.6	0.0%	53.4x	1.9x	UNILEVERCL	39,140	0.9%	0.3	45.3x	22.2x
Miscellaneous	4,170	4,191	-21.51	-0.51%	14	227,036	2.9%	269.5	5.3%	16.0x	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%	240	3,190,731	41.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CAPITECGBF	13.3	+9.9%	1.8	NM	1.3x
STANDARINS	49.9	+9.9%	43.5	21.0x	2.3x
UNITEDINS	59.1	+9.9%	30.9	37.2x	1.8x
EMERALDOIL	126.3	+9.8%	148.4	NM	NM
ASIAPACINS	58.9	+8.3%	43.3	24.6x	2.6x
NITOLINS	42.6	+7.8%	17.0	21.7x	1.4x
CRYSTALINS	109.4	+6.4%	52.0	33.7x	4x
EASTERNINS	75.3	+6.4%	138.5	24.3x	1.4x
ARGONDENIM	19.3	+6.0%	93.8	28.4x	0.8x
BEACHHATCH	50.9	+4.9%	119.6	48.9x	4.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
APEXFOOT	283.1	-9.3%	99.3	22.0x	1.2x
IMAMBUTTON	144.8	-8.1%	20.1	NM	30x
CENTRALPHL	12.1	-4.7%	21.1	NM	2.1x
CAPMIBLMF	10.1	-4.7%	1.9	NM	1.1x
INTECH	24.3	-4.3%	4.0	NM	45.8x
KPPL	10.3	-3.7%	12.5	NM	NM
DAFODILCOM	91.3	-3.7%	20.2	NM	6.7x
AMBEEPHA	884.4	-3.3%	20.6	NM	46.5x
GQBALLPEN	123.3	-3.1%	15.8	NM	1.0x
JHRML	72.0	-3.1%	78.4	31.1x	2.3x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	10.0x	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%	4.1x	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%	30.2x	12.1x
UPGDCL	13,547	0.8%	16.7x	4.4x
PRIMEBANK	13,491	0.8%	4.9x	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	615.1	-0.1%	305.2	65.8x	3.6x
SEAPEARL	208.6	-1.5%	232.5	30.2x	12.1x
LHBL	70.0	-0.4%	168.5	13.8x	4.1x
GEMINISEA	794.6	-0.2%	148.5	37.9x	31.3x
EMERALDOIL	126.3	+9.8%	148.4	NM	NM
LIBRAINFU	1,346.1	+0.1%	143.4	NM	1.1x
EASTERNINS	75.3	+6.4%	138.5	24.3x	1.4x
FUWANGFOOT	30.8	-0.3%	129.4	NM	7.8x
UNIONINS	73.7	+0.3%	126.0	30.0x	4.0x
KBPPWBIL	35.1	-0.6%	122.9	NM	2.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DAFODILCOM	94.0	94.0	1.0	2,056	193.22
AIL	83.5	79.2	12.0	567	46.84
UNITEDINS	57.5	56.9	3.0	750	42.74
SONALIPAPR	631.3	590.0	2.0	32	19.63
ARGONDENIM	19.8	19.8	1.0	893	17.69
REPUBLIC	55.1	55.1	1.0	310	17.08
SEAPEARL	211.8	195.5	5.0	67	13.57
EMERALDOIL	112.0	106.2	2.0	107	11.89
GP	286.6	262.8	4.0	42	11.48
FINEFOODS	128.5	125.0	6.0	86	10.95

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DAFODILCOM	94.0	94.0	193.2	2,056	1
AIL	83.5	79.2	46.8	567	12
UNITEDINS	57.5	56.9	42.7	750	3
SONALIPAPR	631.3	590.0	19.6	32	2
ARGONDENIM	19.8	19.8	17.7	893	1
REPUBLIC	55.1	55.1	17.1	310	1
SEAPEARL	211.8	195.5	13.6	67	5
EMERALDOIL	112.0	106.2	11.9	107	2
GP	286.6	262.8	11.5	42	4
FINEFOODS	128.5	125.0	10.9	86	6
LHBL	70.3	70.3	9.3	132	1
DESHBANDHU	40.0	40.0	8.5	212	3
BXPHERMA	138.0	131.6	8.3	63	13
BBSCABLES	48.5	45.0	7.9	173	6
BRACBANK	33.0	32.9	7.2	218	11
KDSALTD	76.9	70.0	6.0	79	3
GEMINISEA	798.1	798.1	5.4	7	1
RENATA	1,141.8	1,141.8	5.0	4	4
SIMTEX	25.0	24.9	3.7	150	2
KBPPWBIL	35.2	35.2	3.5	100	1
MERCANBANK	12.3	12.0	3.0	251	2
AL-HAJTEX	165.0	163.0	3.0	18	2
Total			505.3		146

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

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Important DSE News

SHAHJABANK

(Q3 Un-audited): Consolidated EPS was Tk. 0.86 for July-September 2023 as against Tk. 0.92 for July-September 2022; Consolidated EPS was Tk. 3.31 for January-September 2023 as against Tk. 3.23 for January-September 2022. Consolidated NOCFPS was Tk. 11.92 for January-September 2023 as against Tk. 12.82 for January-September 2022. Consolidated NAV per share was Tk. 21.60 as on September 30, 2023 and Tk. 19.83 as on September 30, 2022. Significant deviations in Net Asset Value Per Share increased compare to the same period of last year due to increase of net profit after tax during the period.

BDLAMPS

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2023. Date of AGM: 14.12.2023, Time: 11:30 AM, Venue: Digital Platform. Record Date: 12.11.2023. The Company has also reported EPS of Tk. 1.10, NAV per share of Tk. 82.91 and NOCFPS of Tk. (21.59) for the year ended June 30, 2023 as against Tk. 8.20 (restated), Tk. 85.04 (restated) and Tk. (5.16) (restated) respectively for the year ended June 30, 2022.

(Q1 Un-audited): EPS was Tk. (6.60) for July-September 2023 as against Tk. 1.65 for July-September 2022 (restated); NOCFPS was Tk. (10.58) for July-September 2023 as against Tk. (14.53) (restated) for July-September 2022. NAV per share was Tk. 76.85 as on September 30, 2023 and Tk. 91.74 (restated) as on September 30, 2022.

RNSPIN

The Board of Directors has recommended No dividend for the year ended June 30, 2023. Date of AGM: 21.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 12.11.2023. The Company has also reported EPS of Tk. (0.08), NAV per share of Tk. (0.02) and NOCFPS of Tk. (0.04) for the year ended June 30, 2023 as against Tk. (0.09), Tk. 0.06 and Tk. (0.03) respectively for the year ended June 30, 2022.

ETL

The Board of Directors has recommended 2.25% Cash Dividend for the year ended June 30, 2023. Date of AGM: 10.12.2023, Time: 04:30 PM, Venue: Digital Platform. Link for online Registration: <https://etl.bdvirtualagm.com>. Record Date: 14.11.2023. The Company has reported Consolidated EPS of Tk. 0.09, Consolidated NAV per share of Tk. 12.66 and Consolidated NOCFPS of Tk. 1.05 for the year ended June 30, 2023 as against Tk. (0.12), Tk. 12.77 and Tk. (0.96) respectively for the year ended June 30, 2022.

STANDBANKL

(Q3 Un-audited): Consolidated EPS was Tk. 0.15 for July-September 2023 as against Tk. 0.11 for July-September 2022; Consolidated EPS was Tk. 0.28 for January-September 2023 as against Tk. 0.25 for January-September 2022. Consolidated NOCFPS was Tk. 2.30 for January-September 2023 as against Tk. (4.04) for January-September 2022. Consolidated NAV per share was Tk. 16.30 as on September 30, 2023 and Tk. 15.82 as on September 30, 2022.

PREMIERBAN

(Q3 Un-audited): Consolidated EPS was Tk. 1.01 for July-September 2023 as against Tk. 0.93 (restated) for July-September 2022; Consolidated EPS was Tk. 2.53 for January-September 2023 as against Tk. 2.36 (restated) for January-September 2022. Consolidated NOCFPS was Tk. 0.02 for January-September 2023 as against Tk. 6.29 (restated) for January-September 2022. Consolidated NAV per share was Tk. 21.39 as on September 30, 2023 and Tk. 19.38 (restated) as on September 30, 2022.

FARCHEM

The Board of Directors has recommended No Dividend for the year ended June 30, 2023. Date of AGM: 21.12.2023, Time: 12:00 PM, Venue: Digital Platform. Record Date: 12.11.2023. The Company has also reported EPS of Tk. (1.12), NAV per share of Tk. 10.98 and NOCFPS of Tk. (2.52) for the year ended June 30, 2023 as against Tk. (0.39), Tk. 12.10 and Tk. 2.49 respectively for the year ended June 30, 2022.

RUNNERAUTO

The Board of Directors has recommended No Dividend for the year ended June 30, 2023. Date of AGM: 21.12.2023, Time: 11:30 AM. Venue: Digital Platform. Record Date: 19.11.2023. The Company has also reported Consolidated EPS of Tk. (7.75), Consolidated NAV per share of Tk. 62.62 and Consolidated NOCFPS of Tk. 38.32 for the year ended June 30, 2023 as against Tk. 2.40, Tk. 66.50 and Tk. 9.72 respectively for the year ended June 30, 2022.

PUBALIBANK

(Q3 Un-audited): Consolidated EPS was Tk. 3.25 for July-September 2023 as against Tk. 2.75 for July-September 2022; Consolidated EPS was Tk. 5.96 for January-September 2023 as against Tk. 5.11 for January-September 2022. Consolidated NOCFPS was Tk. (2.27) for January-September 2023 as against Tk. (9.01) for January-September 2022. Consolidated NAV per share was Tk. 45.79 as on September 30, 2023 and Tk. 41.43 as on September 30, 2022.

PRIMEBANK

(Q3 Un-audited): Consolidated EPS was Tk. 1.12 for July-September 2023 as against Tk. 0.88 for July-September 2022; Consolidated EPS was Tk. 3.05 for January-September 2023 as against Tk. 2.47 for January-September 2022. Consolidated NOCFPS was Tk. 4.47 for January-September 2023 as against Tk. 1.09 for January-September 2022. Consolidated NAV per share was Tk. 29.75 as on September 30, 2023 and Tk. 27.18 as on September 30, 2022.

ARGONDENIM

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2023. Date of AGM: 10.12.2023, Time: 03:00 PM, Venue: Digital Platform. Link of online registration: <https://argondenim.bdvirtualagm.com>. Record Date: 14.11.2023. The Company has also reported EPS of Tk. 0.68, NAV per share of Tk. 24.13 and NOCFPS of Tk. 2.65 for the year ended June 30, 2023 as against Tk. 0.52, Tk. 24.44 and Tk. (0.41) respectively for the year ended June 30, 2022.

PRIMELIFE

(Q3 Un-audited): As per consolidated life revenue account of the company for July to September, 2023, excess of total income over total expenses including claims (surplus) was BDT 13.19 million as against excess of total income over total expenses including claims (surplus) of BDT 46.88 million in the corresponding previous period of 2022. Whereas as per consolidated life revenue account of the company for January to September, 2023, excess of total expenses including claims over total income (deficit) was BDT 794.09 million as against excess of total expenses including claims over total income (deficit) of BDT 944.91 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT 6,919.24 million as on September 30, 2023 as against BDT 7,132.62 million as on September 30, 2022 resulting a net decrease of BDT 213.38 million.

INTECH

Refer to the earlier news disseminated by DSE on 02.10.2023 regarding Dividend Declaration and announcement of 21st and 22nd AGM Date, the Company has further informed that the 21st and 22nd AGM of the Company has been postponed. New date and time of the AGM will be announced later. All other information will remain unchanged.

PREMIERBAN

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'The Premier Bank PLC.' instead of 'The Premier Bank Limited' with effect from October 22, 2023. Other things (except name) will remain unchanged.

CNATEX

The Company will be placed in 'B' category from existing 'Z' category with effect from October 22, 2023 as the Company has reported disbursement of 0.40% Cash Dividend for the year ended June 30, 2022.

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