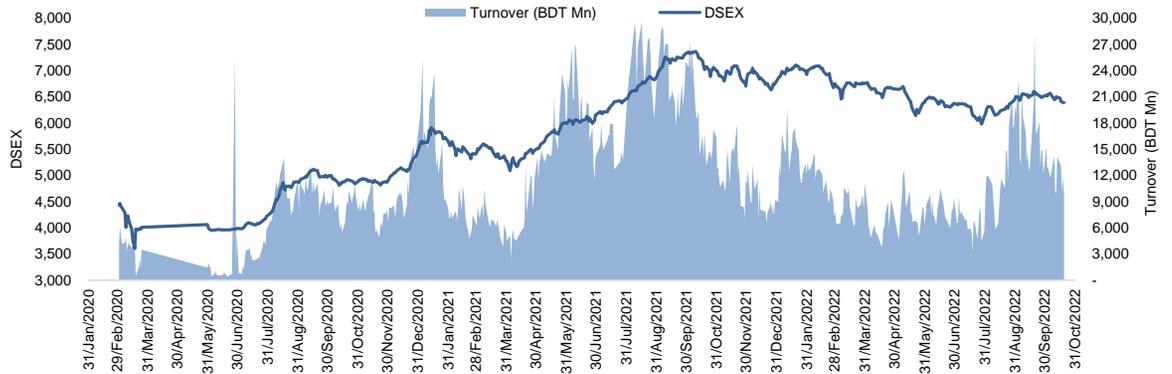


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 2.11 points and closed at 6,392.30. The bluechip index DS30 (+0.29%), the Shariah-based index DSES (-0.04%), and the large-cap index CDSET (+0.13%) closed at 2,277.65, 1,407.03, and 1,246.73 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.37% followed by Bank (+0.14%), Fuel & Power (+0.04%). Food & Allied experienced the highest loss of 0.44% followed by Engineering (-0.32%), NBF1 (-0.18%). Block trades contributed 0.9% of the overall market turnover. Bangladesh Export Import Company Ltd. (+1.0%) was the most traded share with a turnover of BDT 1,170 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 6,392.30 | 6,390.18 | +2.11 | +0.03% | -5.4% |
| DS30 | 2,277.65 | 2,271.01 | +6.64 | +0.29% | -10.1% |
| DSES | 1,407.03 | 1,407.56 | -0.53 | -0.04% | -1.7% |
| CDSET | 1,246.73 | 1,245.09 | +1.64 | +0.13% | -8.3% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 62 | 78 | 225 | 365 |
| A Category (Equity) | 44 | 59 | 149 | 252 |
| B Category (Equity) | 13 | 18 | 58 | 89 |
| N Category (Equity) | 4 | 0 | 3 | 7 |
| Z Category (Equity) | 1 | 1 | 15 | 17 |
| Mutual Funds | 2 | 0 | 29 | 31 |
| Corporate Bonds | 1 | 0 | 1 | 2 |
| Treasury Bonds | 0 | 0 | 0 | 0 |

| | | Today | Last Day | Daily %Δ |
|----------|--------------|-----------|-----------|----------|
| Mcap | Mn BDT | 7,699,076 | 7,698,651 | +0.0% |
| | Mn USD | 75,095 | 75,090 | |
| Turnover | Mn BDT | 9,756 | 11,787 | -17.2% |
| | Mn USD | 95 | 115 | |
| Volume | Mn Shares | 132 | 157 | -15.8% |
| | No. of Trade | 159,143 | 195,096 | -18.4% |

* Average Interbank Exchange Rate is BDT 102.53 as of Oct 19, 2022

| | |
|---|--|
| Fahim Hassan Research Associate (880) 1709636546 fahim.hassan@bracepl.com | Md. Tanvir Ahmed Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com |
|---|--|

Figure: Sectorial Turnover (BDT)

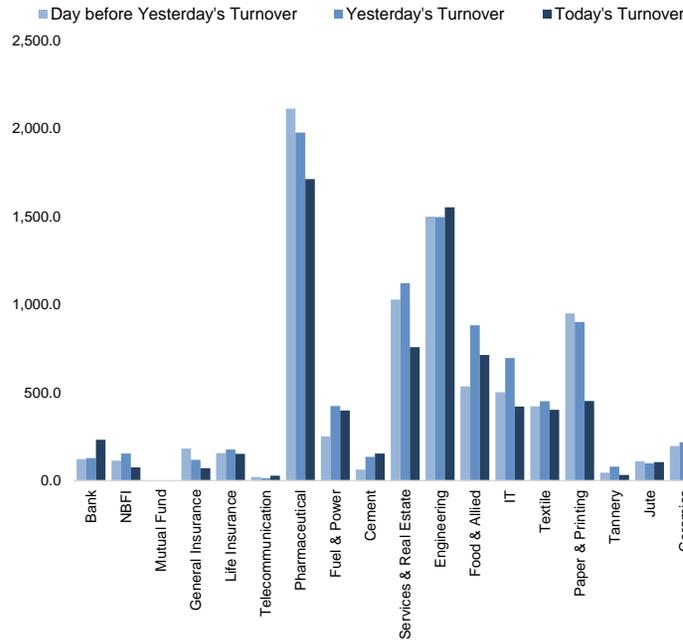
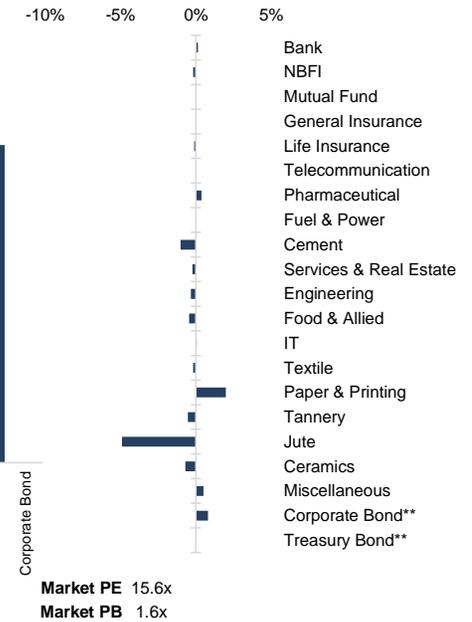


Figure: Sectorial Mcap Change



Market PE 15.6x
Market PB 1.6x

| 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 | 1,436 | 1,434 | +1.99 | +0.14% | 33 | 662,005 | 8.6% | 232.4 | 2.5% | 7.7x | 0.7x | GP | 386,996 | 8.5% | 12.2 | 11.2x | 9.1x |
| NBFI | 1,927 | 1,931 | -3.54 | -0.18% | 23 | 187,992 | 2.4% | 75.9 | 0.8% | NM | 4.0x | WALTONHIL | 317,378 | 7.0% | 0.3 | 26.1x | 3.1x |
| Mutual Fund | 854 | 854 | - | - | 37 | 38,621 | 0.5% | 1.3 | 0.0% | NM | 0.8x | BATBC | 280,098 | 6.2% | 4.6 | 18.1x | 7.4x |
| General Insurance | 3,141 | 3,140 | +0.36 | +0.01% | 41 | 91,085 | 1.2% | 71.9 | 0.8% | 14.8x | 1.5x | SQRUPHARMA | 185,977 | 4.1% | 12.4 | 10.0x | 1.9x |
| Life Insurance | 2,372 | 2,375 | -2.49 | -0.10% | 13 | 66,108 | 0.9% | 152.8 | 1.7% | NM | NM | ROBI | 157,138 | 3.5% | 0.6 | NM | 2.4x |
| Telecommunication | 4,946 | 4,946 | - | - | 3 | 580,232 | 7.5% | 28.1 | 0.3% | 15.3x | 4.9x | RENATA | 139,694 | 3.1% | 2.2 | 25.2x | 4.9x |
| Pharmaceutical | 3,957 | 3,943 | +14.40 | +0.37% | 33 | 758,480 | 9.9% | 1,711.2 | 18.6% | 18.6x | 2.7x | UPGDCL | 135,475 | 3.0% | 1.0 | 11.0x | 4.1x |
| Fuel & Power | 1,701 | 1,700 | +0.68 | +0.04% | 23 | 448,371 | 5.8% | 397.5 | 4.3% | 11.4x | 1.1x | BEXIMCO | 108,138 | 2.4% | 1,170.3 | 7.5x | 1.4x |
| Cement | 2,345 | 2,369 | -23.78 | -1.00% | 7 | 112,653 | 1.5% | 153.9 | 1.7% | 23.2x | 2.4x | BERGERPBL | 79,459 | 1.8% | 0.6 | 25.8x | 6.9x |
| Services & Real Estate | 1,753 | 1,757 | -4.13 | -0.24% | 8 | 69,240 | 0.9% | 758.1 | 8.2% | 68.0x | 1.3x | LHBL | 76,302 | 1.7% | 150.1 | 18.6x | 4.1x |
| Engineering | 4,540 | 4,555 | -14.56 | -0.32% | 42 | 533,005 | 6.9% | 1,552.2 | 16.9% | 20.1x | 1.9x | BXPHARMA | 76,196 | 1.7% | 154.0 | 13.3x | 1.9x |
| Food & Allied | 21,286 | 21,380 | -93.56 | -0.44% | 21 | 379,293 | 4.9% | 713.2 | 7.7% | 22.7x | 8.0x | BEACONPHAR | 74,729 | 1.6% | 48.4 | 79.9x | 12.8x |
| IT | 2,778 | 2,777 | +1.68 | +0.06% | 11 | 36,221 | 0.5% | 421.2 | 4.6% | 29.9x | 2.5x | ICB | 74,135 | 1.6% | 2.1 | 42.0x | 1.6x |
| Textile | 1,663 | 1,666 | -2.91 | -0.17% | 58 | 174,907 | 2.3% | 402.9 | 4.4% | 25.9x | 1.1x | BRACBANK | 57,619 | 1.3% | 0.1 | 11.3x | 1.0x |
| Paper & Printing | 12,844 | 12,593 | +250.60 | +1.99% | 6 | 49,486 | 0.6% | 452.4 | 4.9% | NM | 3.4x | ISLAMIBANK | 52,969 | 1.2% | 27.0 | 10.9x | 0.8x |
| Tannery | 3,072 | 3,088 | -16.27 | -0.53% | 6 | 33,077 | 0.4% | 32.4 | 0.4% | 34.7x | 3.2x | DUTCHBANGL | 43,554 | 1.0% | 15.2 | 7.5x | 1.1x |
| Jute | 12,908 | 13,572 | -664.10 | -4.89% | 3 | 3,158 | 0.0% | 106.3 | 1.2% | NM | 44.6x | TITASGAS | 40,459 | 0.9% | 0.1 | 12.7x | 0.6x |
| Ceramics | 696 | 701 | -4.90 | -0.70% | 5 | 32,189 | 0.4% | 139.2 | 1.5% | 30.2x | 1.9x | POWERGRID | 37,347 | 0.8% | 0.9 | 10.2x | 0.4x |
| Miscellaneous | 4,348 | 4,327 | +21.63 | +0.50% | 15 | 243,930 | 3.2% | 1,802.6 | 19.6% | 12.0x | 2.0x | SUMITPOWER | 36,308 | 0.8% | 6.8 | 9.4x | 1.0x |
| Corporate Bond** | 91 | 90 | +0.73 | +0.81% | 9 | 37,425 | 0.5% | 0.5 | 0.0% | NM | NM | BSCCL | 36,098 | 0.8% | 15.2 | 15.7x | 3.4x |
| Treasury Bond** | 100 | 100 | - | - | 250 | 3,162,182 | 41.1% | 0.0 | 0.0% | NM | NM | | | | | | |

| Top Ten Gainers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB | Top Twenty Free Float Mcap (BDT Mn) | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE | PB | Most Traded Share | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|-----------------|-------------------|--------|-------------------|-------|-------|-------------------------------------|--------------------------|----------------------------|-------|-------|-------------------|-------------------|--------|-------------------|-------|-------|
| NAVANAPHAR | 31.9 | +10.0% | 0.0 | 14.1x | 0.8x | SQRUPHARMA | 121,685 | 7.1% | 10.0x | 1.9x | BEXIMCO | 123.4 | +1.0% | 1,170.3 | 7.5x | 1.4x |
| ADNTEL | 97.3 | +8.0% | 220.1 | 37.6x | 3.6x | BEXIMCO | 75,102 | 4.4% | 7.5x | 1.4x | ORIONPHARM | 121.2 | +7.1% | 772.2 | 29.5x | 1.5x |
| IBP | 22.5 | +7.7% | 81.3 | 22.1x | 1.6x | BATBC | 74,086 | 4.3% | 18.1x | 7.4x | ANWARGALV | 520.9 | -6.7% | 604.8 | 48.0x | 30.9x |
| ORIONPHARM | 121.2 | +7.1% | 772.2 | 29.5x | 1.5x | RENATA | 68,199 | 4.0% | 25.2x | 4.9x | EHL | 115.4 | -7.1% | 444.0 | 19.6x | 1.6x |
| SAPORTL | 31.9 | +6.3% | 37.6 | 27.6x | 0.9x | BXPHARMA | 53,200 | 3.1% | 13.3x | 1.9x | GEMINISEA | 509.2 | -14.2% | 361.0 | 40.8x | 38.9x |
| SONALIPAPR | 860.0 | +6.0% | 210.3 | 91.2x | 5.2x | BEACONPHAR | 52,310 | 3.0% | 79.9x | 12.8x | KDSALTD | 87.1 | +3.4% | 285.6 | 37.4x | 3.4x |
| KOHINOOR | 636.5 | +5.6% | 31.0 | 57.9x | 11x | GP | 38,700 | 2.2% | 11.2x | 9.1x | JHRML | 115.7 | +0.5% | 252.2 | 39.1x | 3.8x |
| SUNLIFEINS | 69.2 | +4.7% | 68.8 | NM | NM | BRACBANK | 30,976 | 1.8% | 11.3x | 1.0x | ADNTEL | 97.3 | +8.0% | 220.1 | 37.6x | 3.6x |
| EASTRNLAB | 2,210.2 | +4.4% | 65.9 | NM | 14.5x | LHBL | 26,950 | 1.6% | 18.6x | 4.1x | SONALIPAPR | 860.0 | +6.0% | 210.3 | 91.2x | 5.2x |
| LRBDL | 39.5 | +3.9% | 26.1 | 16.8x | 1.1x | ISLAMIBANK | 23,794 | 1.4% | 10.9x | 0.8x | BSC | 130.3 | +1.2% | 202.1 | 9.7x | 1.9x |

| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|----------------|-------------------|--------|-------------------|-------|-------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| GEMINISEA | 509.2 | -14.2% | 361.0 | 40.8x | 38.9x | ANWARGALV | 598.5 | 598.0 | 2.0 | 226 | 135.20 |
| BDCOM | 48.4 | -9.9% | 80.6 | 32.3x | 3x | SONALIPAPR | 812.0 | 780.0 | 12.0 | 132 | 103.45 |
| TAMIJTEX | 228.8 | -8.7% | 49.0 | 34.6x | 2.6x | PRIMEBANK | 19.2 | 18.9 | 3.0 | 2,105 | 39.90 |
| PAPERPROC | 262.6 | -8.7% | 53.2 | 56.8x | 8.3x | TRUSTBANK | 35.0 | 35.0 | 2.0 | 1,000 | 35.00 |
| APEXFOODS | 251.1 | -8.6% | 53.0 | 48.9x | 2.0x | GSPFINANCE | 33.0 | 33.0 | 1.0 | 993 | 32.77 |
| BDLAMPS | 318.9 | -8.5% | 74.3 | 34.4x | 3.2x | ORIONINFU | 870.0 | 802.0 | 3.0 | 36 | 29.93 |
| MONOSPOOL | 373.9 | -8.5% | 90.1 | 68.6x | 8.3x | KDSALTD | 84.0 | 81.9 | 6.0 | 345 | 28.38 |
| UNIONCAP | 8.4 | -7.7% | 7.0 | NM | NM | BDCOM | 55.0 | 48.4 | 4.0 | 511 | 27.64 |
| JMISMDL | 472.7 | -7.5% | 147.4 | NM | 3.8x | SEAPPEARL | 125.0 | 125.0 | 3.0 | 200 | 25.00 |
| EHL | 115.4 | -7.1% | 444.0 | 19.6x | 1.6x | ADNTEL | 99.0 | 90.3 | 7.0 | 123 | 11.45 |

* 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 |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| ANWARGALV | 598.5 | 598.0 | 135.2 | 226 | 2 |
| SONALIPAPR | 812.0 | 780.0 | 103.4 | 132 | 12 |
| PRIMEBANK | 19.2 | 18.9 | 39.9 | 2,105 | 3 |
| TRUSTBANK | 35.0 | 35.0 | 35.0 | 1,000 | 2 |
| GSPFINANCE | 33.0 | 33.0 | 32.8 | 993 | 1 |
| ORIONINFU | 870.0 | 802.0 | 29.9 | 36 | 3 |
| KDSALTD | 84.0 | 81.9 | 28.4 | 345 | 6 |
| BDCOM | 55.0 | 48.4 | 27.6 | 511 | 4 |
| SEAPEARL | 125.0 | 125.0 | 25.0 | 200 | 3 |
| ADNTEL | 99.0 | 90.3 | 11.5 | 123 | 7 |
| SUNLIFEINS | 66.1 | 64.0 | 8.5 | 130 | 3 |
| AAMRATECH | 46.5 | 39.5 | 8.2 | 192 | 3 |
| EHL | 135.1 | 112.0 | 7.4 | 56 | 2 |
| TITASGAS | 44.0 | 44.0 | 6.7 | 153 | 2 |
| PADMALIFE | 52.9 | 50.0 | 5.8 | 110 | 2 |
| FORTUNE | 80.2 | 79.5 | 5.7 | 72 | 3 |
| BSCCL | 230.0 | 230.0 | 4.0 | 18 | 1 |
| LRBDL | 41.2 | 41.2 | 3.7 | 90 | 1 |
| PHARMAID | 860.0 | 860.0 | 3.4 | 4 | 1 |
| LHBL | 72.9 | 72.9 | 2.8 | 38 | 1 |
| NRBCBANK | 17.6 | 17.6 | 2.6 | 149 | 1 |
| MONOSPOOL | 384.0 | 384.0 | 2.3 | 6 | 1 |
| Total | | | 550.4 | | 87 |

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|--|-------------|----------|-------|-------------|-----------|
| | | Stock | Cash | | |
| Meghna Insurance Company Limited | - | 0.0% | 3.0% | Record Date | 24-Oct-22 |
| Bangladesh Monospool Paper Manufacturing Co. Limited | - | 10.0% | 10.0% | Record Date | 24-Oct-22 |
| Paper Processing & Packaging Limited | - | 7.0% | 8.0% | Record Date | 24-Oct-22 |
| Apex Footwear Limited. | - | 10.0% | 35.0% | Record Date | 24-Oct-22 |
| KDS Accessories Limited | - | 0.0% | 16.0% | Record Date | 1-Nov-22 |
| Titas Gas Transmission & Dist. Co. Ltd. | - | 0.0% | 10.0% | Record Date | 3-Nov-22 |
| Doreen Power Generations and Systems Limited | - | 12.0% | 18.0% | Record Date | 6-Nov-22 |
| Bangladesh Submarine Cable Company Limited | - | 0.0% | 46.0% | Record Date | 7-Nov-22 |
| Apex Spinning & Knitting Mills Limited | - | 0.0% | 20.0% | Record Date | 7-Nov-22 |
| Apex Foods Limited | - | 0.0% | 20.0% | Record Date | 7-Nov-22 |
| FAS Finance & Investment Limited | - | 0.0% | 0.0% | Record Date | 7-Nov-22 |
| Bangladesh Lamps Limited | - | 7.0% | 20.0% | Record Date | 10-Nov-22 |
| Gemini Sea Food Ltd. | - | 30.0% | 10.0% | Record Date | 10-Nov-22 |
| Far East Knitting & Dyeing Industries Limited | - | 0.0% | 10.0% | Record Date | 13-Nov-22 |
| Intraco Refueling Station Limited | - | 0.0% | 10.0% | Record Date | 14-Nov-22 |
| Tamijuddin Textile Mills Limited | - | 0.0% | 30.0% | Record Date | 14-Nov-22 |
| The Peninsula Chittagong Limited | - | 0.0% | 2.5% | Record Date | 14-Nov-22 |

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Important DSE News
AMANFEED

The Board of Directors has recommended 10% cash dividend for general shareholders other than Sponsors & Directors for the year ended June 30, 2022. The Company has also informed that the cash dividend to be payable to the general shareholders Tk. 4,81,15,386.00 only and Sponsors Shareholders hold 82,855,014 shares. Date of AGM: 26.12.2022, Time: 11:00 AM, Venue: Digital Platform. Record Date: 28.11.2022. The Company has also reported EPS of Tk. 0.84, NAV per share of Tk. 32.52 and NOCFPS of Tk. 0.82 for the year ended June 30, 2022 as against Tk. 2.53, Tk. 32.23 and Tk. 0.16 respectively for the same period of the previous year.

GEMINISEA

The Board of Directors has recommended 10% Cash (excluding Directors & Sponsors) and 30% Stock dividend for the year ended June 30, 2022. Date of AGM: 08.12.2022, Time: 11:30 AM, Venue: Digital Platform. Record Date: 10.11.2022. Sponsors/Directors hold 33.65% shares, Others hold 66.35% shares and Taka 3,11,62,040.00 will be paid to other shareholders as dividend. The Company has reported EPS of Tk. 12.49, NAV per share of Tk. 13.10 and NOCFPS of Tk. (25.79) for the year ended June 30, 2022 as against Tk. 0.72, Tk. 0.93 and Tk. 1.05 respectively for the same period of the previous year. The Company also informed that Earnings Per Share (EPS) has increased significantly due to increase of sales revenue by 109% against last year.

GP

(Q3 Un-audited): EPS was Tk. 6.72 for July-September 2022 as against Tk. 6.34 for July-September 2021; EPS was Tk. 19.54 for January-September 2022 as against Tk. 19.23 for January-September 2021. NOCFPS was Tk. 37.29 for January-September 2022 as against Tk. 33.87 for January-September 2021. NAV per share was Tk. 31.48 as on September 30, 2022 and Tk. 30.82 as on September 30, 2021.

SHAHJABANK

(Q3 Un-audited): Consolidated EPS was Tk. 0.94 for July-September 2022 as against Tk. 0.69 for July-September 2021; Consolidated EPS was Tk. 3.33 for January-September 2022 as against Tk. 2.34 for January-September 2021. Consolidated NOCFPS was Tk. 13.21 for January-September 2022 as against Tk. (1.24) for January-September 2021. Consolidated NAV per share was Tk. 20.43 as on September 30, 2022 and Tk. 18.33 as on September 30, 2021.

PRIMEBANK

Mr. Azam J Chowdhury, one of the Directors of the Company, has expressed his intention to buy 21,05,257 shares of the Company at prevailing market price (in the Block Market) through Dhaka Stock Exchange within October 31, 2022.

CITYBANK

Mrs. Hosne Ara Aziz, one of the Sponsors of the Company, has further informed that she has completed her sale of 5,75,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 04.10.2022.

MERCANBANK

Engr. Md. Monsuruzzaman, one of the Sponsors of the Company, has further informed that he has completed his sale of 8,20,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 18.09.2022.

PRAGATILIF

Mr. Mabroor Hossain, one of the Sponsors of the Company, has further informed that he has completed his sale of 3,72,000 shares (1,74,400 shares from DSE and 1,97,600 shares from CSE) of the company at prevailing market price as per declaration disseminated on 26.09.2022.

SOUTHEASTB

Yussuf Abdullah Harun, one of the Sponsors of the Company, has expressed his intention to buy 10,00,000 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within October 31, 2022.