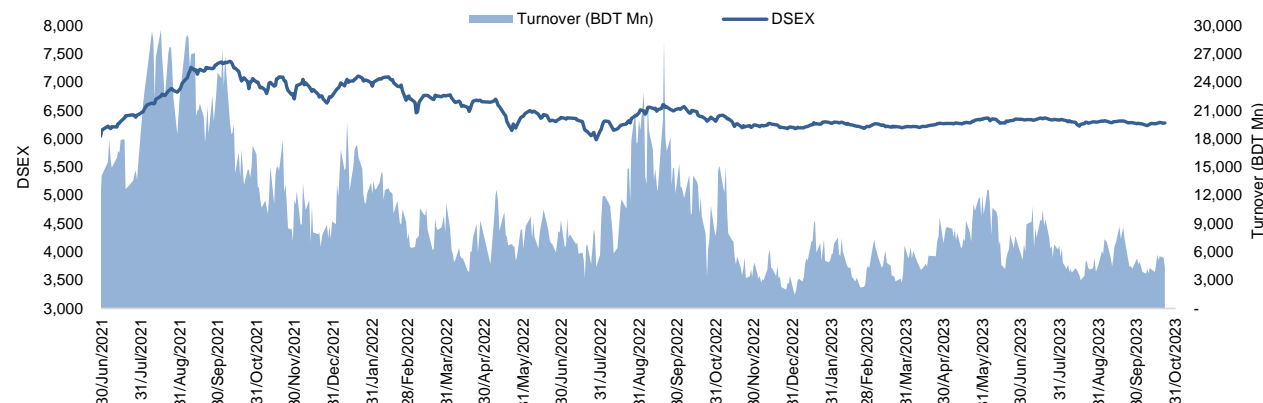


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 1.72 points and closed at 6,277.89. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (+0.11%), and the large-cap index CDSET (+0.07%) closed at 2,136.23, 1,361.48, and 1,211.00 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.15% followed by Bank (+0.06%), Engineering (+0.02%), Food & Allied (+0.02%). Fuel & Power experienced the highest loss of 0.01% followed by Telecommunication (0.00%), NBFI (0.00%). Block trades contributed 14.0% of the overall market turnover. Tosrif Industries Limited (+9.8%) was the most traded share with a turnover of BDT 233 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,277.89	6,276.17	+1.72	+0.03%	+1.1%
DS30	2,136.23	2,135.50	+0.73	+0.03%	-2.7%
DSES	1,361.48	1,359.93	+1.55	+0.11%	+0.2%
CDSET	1,211.00	1,210.11	+0.89	+0.07%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	67	77	158	302
A Category (Equity)	42	54	102	198
B Category (Equity)	22	19	43	84
N Category (Equity)	0	2	0	2
Z Category (Equity)	3	2	13	18
Mutual Funds	2	0	12	14
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,841,372	7,812,664	+0.4%
	Mn USD	70,963	70,703	
Turnover	Mn BDT	4,387	5,396	-18.7%
	Mn USD	40	49	
Volume	Mn Shares	86	100	-14.5%
No. of Trade		109,865	133,992	-18.0%

* Average Interbank Exchange Rate is BDT 110.50 as of Oct 23, 2023

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Figure: Sectorial Turnover (BDT Mn)

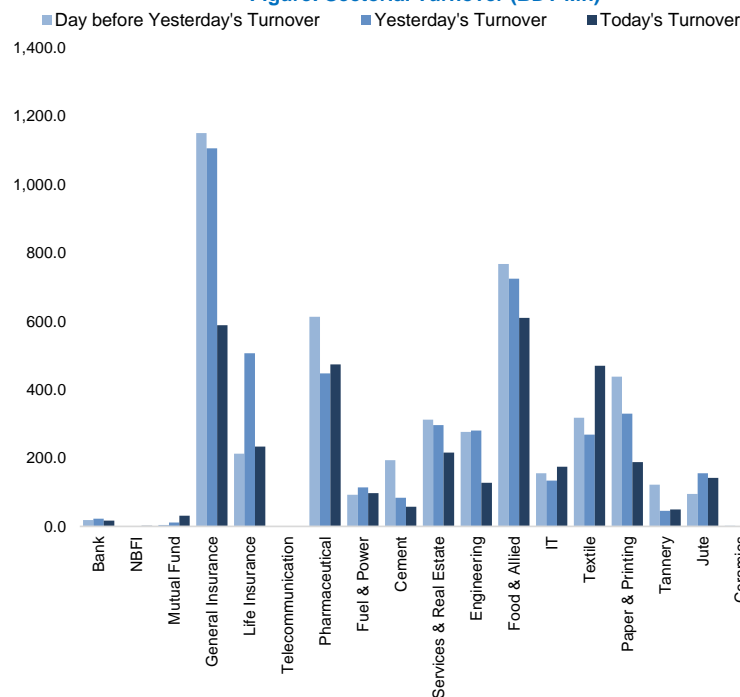
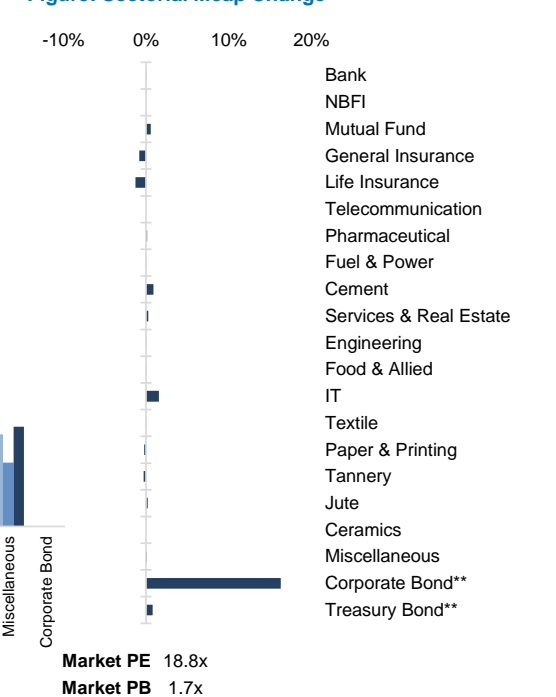


Figure: Sectorial Mcap Change



Market PE 18.8x

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	+0.92	+0.06%	35	681,029	8.7%	17.4	0.5%	11.8x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	1.6	0.0%	NM	20.5x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	842	837	+4.84	+0.58%	37	39,834	0.5%	30.9	0.8%	NM	0.8x	BATBC	280,098	6.2%	0.0	15.4x	6.2x
General Insurance	3,718	3,748	-30.32	-0.81%	42	108,445	1.4%	588.7	15.6%	20.0x	1.7x	SQURPHARMA	186,421	4.1%	56.7	9.8x	1.6x
Life Insurance	2,664	2,699	-34.61	-1.28%	15	74,459	1.0%	233.8	6.2%	NM	NM	ROBI	157,138	3.5%	0.2	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.4	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.1	66.1x	4.4x
Pharmaceutical	3,719	3,713	+5.57	+0.15%	33	720,602	9.2%	473.8	12.6%	20.2x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,698	1,698	-0.10	-0.01%	23	447,769	5.7%	97.5	2.6%	30.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	14.6x	1.2x
Cement	2,558	2,535	+22.65	+0.89%	7	122,844	1.6%	57.7	1.5%	23.7x	2.6x	BERGERPBL	82,854	1.8%	1.7	27.1x	5.9x
Services & Real Esta	1,861	1,856	+5.28	+0.28%	8	73,541	0.9%	216.2	5.7%	22.4x	1.2x	LHBL	81,761	1.8%	37.7	13.9x	4.1x
Engineering	4,490	4,490	+0.71	+0.02%	42	527,365	6.7%	127.8	3.4%	41.0x	1.7x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,532	21,529	+3.34	+0.02%	21	398,424	5.1%	610.3	16.2%	20.1x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.1x	1.5x
IT	2,987	2,941	+45.76	+1.56%	11	38,945	0.5%	174.7	4.6%	27.3x	2.8x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,610	1,610	-0.34	-0.02%	58	168,503	2.2%	470.0	12.5%	94.1x	1.1x	BEACONPHAR	56,595	1.2%	0.0	NM	9.5x
Paper & Printing	9,911	9,931	-20.51	-0.21%	6	38,186	0.5%	188.4	5.0%	36.8x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,132	3,141	-8.54	-0.27%	6	33,081	0.4%	49.4	1.3%	46.9x	3.1x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	20,554	20,510	+44.78	+0.22%	3	5,028	0.1%	142.2	3.8%	NM	NM	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.3	0.0%	53.7x	1.9x	UNILEVERCL	39,466	0.9%	2.7	45.6x	22.4x
Miscellaneous	4,153	4,148	+4.97	+0.12%	14	226,103	2.9%	291.5	7.7%	17.8x	1.8x	POWERGRID	37,347	0.8%	0.1	NM	0.4x
Corporate Bond**	103	88	+14.42	+16.31%	11	40,883	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.72	+0.82%	242	3,281,506	41.9%	0.3	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TOSRIFA	28.0	+9.8%	233.4	15.4x	0.9x
CAPITECGBF	16.0	+9.6%	29.1	NM	1.6x
IMAMBUTTON	165.9	+9.2%	17.2	NM	84.2x
ARAMIT	316.2	+8.7%	30.9	53.3x	2.2x
AAMRANET	52.2	+7.9%	48.4	14.3x	1.4x
NTC	506.6	+7.6%	9.8	NM	250.8x
AMBEEPFA	1,022.0	+7.5%	23.9	NM	54x
STANDARINS	53.3	+6.4%	44.2	22.4x	2.4x
LIBRAINFU	1,507.6	+6.2%	101.8	NM	1.2x
PHENIXINS	41.7	+6.1%	28.1	22.5x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	31.2	-9.0%	114.8	NM	2.6x
CRYSTALINS	96.3	-5.0%	19.6	31.5x	4x
EASTERNINS	68.3	-4.7%	40.5	22.0x	1.3x
MEGHNALIFE	79.1	-4.2%	80.5	NM	NM
FUWANGFOOD	29.5	-4.2%	151.3	NM	7.4x
GQBALLPEN	122.0	-4.0%	9.3	NM	1.0x
MEGHNACEM	58.3	-4.0%	0.0	49.5x	1.1x
KAY&QUE	217.7	-3.9%	12.8	NM	3.9x
SONALILIFE	79.3	-3.4%	11.9	NM	NM
SAMATALETH	57.2	-2.7%	1.4	NM	4.0x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.8x	1.6x
BATBC	74,086	4.3%	15.4x	6.2x
BEXIMCO	69,196	4.0%	14.6x	1.2x
RENATA	68,042	3.9%	66.1x	4.4x
BXPHARMA	45,564	2.6%	14.1x	1.5x
BEACONPHAR	39,617	2.3%	NM	9.5x
GP	38,700	2.2%	11.9x	7.3x
BRACBANK	30,964	1.8%	8.3x	0.9x
ISLAMIBANK	29,927	1.7%	8.5x	0.7x
LHBL	28,562	1.6%	13.9x	4.1x
PUBALIBANK	19,162	1.1%	4.2x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	19.0x	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%	28.1x	11.2x
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
TOSRIFA	28.0	+9.8%	233.4	15.4x	0.9x
SEAPEARL	194.2	+1.0%	183.9	28.1x	11.2x
FUWANGFOOD	29.5	-4.2%	151.3	NM	7.4x
SONALIANS	745.6	+0.5%	141.6	NM	6.4x
GEMINISEA	796.7	-0.5%	126.7	38.0x	31.4x
EMERALDOIL	128.9	-1.4%	126.3	NM	NM
KBPPWBIL	31.2	-9.0%	114.8	NM	2.6x
KOHINOOR	548.8	+2.0%	107.2	48.1x	9.6x
LIBRAINFU	1,507.6	+6.2%	101.8	NM	1.2x
ORIONINFU	334.5	+4.1%	92.2	NM	24.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EBL	29.4	29.2	3.0	4,850	142.58
TRUSTBANK	31.5	31.5	2.0	4,300	135.45
SONALIPAPR	631.7	602.2	32.0	205	128.22
NBL	9.1	8.0	7.0	3,500	30.81
KDSALTD	75.0	75.0	3.0	258	19.35
UTTARABANK	22.0	22.0	1.0	860	18.92
BATBC	479.8	479.8	31.0	34	16.40
BRACBANK	33.0	32.6	4.0	257	8.49
GP	285.0	285.0	3.0	28	8.09
CRYSTALINS	98.0	98.0	1.0	60	5.90

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EBL	29.4	29.2	142.6	4,850	3
TRUSTBANK	31.5	31.5	135.5	4,300	2
SONALIPAPR	631.7	602.2	128.2	205	32
NBL	9.1	8.0	30.8	3,500	7
KDSALTD	75.0	75.0	19.3	258	3
UTTARABANK	22.0	22.0	18.9	860	1
BATBC	479.8	479.8	16.4	34	31
BRACBANK	33.0	32.6	8.5	257	4
GP	285.0	285.0	8.1	28	3
CRYSTALINS	98.0	98.0	5.9	60	1
TOSRIFA	26.8	26.5	5.9	220	4
AOL	32.9	32.9	5.5	169	3
SEAPEARL	200.0	200.0	4.0	20	1
CNATEX	11.3	10.0	3.8	350	2
SOUTHEASTB	12.3	12.3	3.7	300	1
JANATAINS	38.5	38.5	3.6	93	1
DUTCHBANGL	57.1	53.2	3.6	64	3
KARNAPHULI	37.5	37.5	3.5	93	1
ASIAINS	53.2	53.2	3.2	60	1
BEXIMCO	104.1	104.1	3.1	29	2
RDFOOD	37.8	37.8	3.0	79	1
RAHIMAFOOD	235.0	217.0	2.9	13	2
Total			614.5		171

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
DOREENPWR		0.0%	11%	Record Date	9-Nov-23
BDLAMPS		0.0%	10%	Record Date	12-Nov-23
RNSPIN		0.0%	0%	Record Date	12-Nov-23
FARCHEM		0.0%	0%	Record Date	12-Nov-23
RENATA		0.0%	63%	Record Date	12-Nov-23

Important DSE News

MIRAKHTER

The Board of Directors has recommended 12.50% Cash Dividend for the year ended June 30, 2023. Date of AGM: 21.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 15.11.2023. The Company has also reported Consolidated EPS of Tk. 3.31, Consolidated NAV per share of Tk. 49.81 and Consolidated NOCFPS of Tk. 14.05 for the year ended June 30, 2023 as against Tk. 2.93, Tk. 47.68 and Tk. 11.74 respectively for the year ended June 30, 2022.

FEKDIL

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2023. Date of AGM: 17.12.2023, Time: 11:30 AM, Venue: Digital Platform. Record Date: 16.11.2023. The Company has also reported EPS of Tk. 1.53, NAV per share of Tk. 19.53 and NOCFPS of Tk. 1.36 for the year ended June 30, 2023 as against Tk. 1.04, Tk. 19.10 and Tk. 2.17 respectively for the year ended June 30, 2022.

SQUARETEXT

The Board of Directors has recommended 30% Cash Dividend for the year ended June 30, 2023. The Board has also approved Tk. 45.00 crore for BMRE purposes. Date of AGM: 14.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 16.11.2023. The Company has also reported Consolidated EPS of Tk. 5.81, Consolidated NAV per share of Tk. 48.93 and Consolidated NOCFPS of Tk. 3.79 for the year ended June 30, 2023 as against Tk. 9.93, Tk. 46.62 and Tk. 16.25 respectively for the year ended June 30, 2022.

AGRANINS

(Q3 Un-audited): EPS was Tk. 0.45 for July-September 2023 as against Tk. 0.41 for July-September 2022; EPS was Tk. 1.26 for January-September 2023 as against Tk. 1.08 for January-September 2022. NOCFPS was Tk. 0.13 for January-September 2023 as against Tk. (0.09) for January-September 2022. NAV per share was Tk. 19.32 as on September 30, 2023 and Tk. 20.17 as on December 31, 2022.

SQURPHARMA

The Board of Directors has recommended 105% Cash Dividend for the year ended June 30, 2023. The Board has also approved Tk. 400.00 crore for BMRE, Capital Machineries and Lands for future expansion. Date of AGM: 14.12.2023, Time: 10:00 AM, Venue: Digital Platform. Record Date: 16.11.2023. The Company has also reported Consolidated EPS of Tk. 21.41, Consolidated NAV per share of Tk. 129.95 and Consolidated NOCFPS of Tk. 9.64 for the year ended June 30, 2023 as against Tk. 20.48, Tk. 118.68 and Tk. 14.52 respectively for the year ended June 30, 2022.

PHENIXINS

(Q3 Un-audited): EPS was Tk. 0.77 for July-September 2023 as against Tk. 0.57 for July-September 2022; EPS was Tk. 1.77 for January-September 2023 as against Tk. 1.96 for January-September 2022. NOCFPS was Tk. 1.44 for January-September 2023 as against Tk. 1.58 for January-September 2022, NAV per share was Tk. 36.66 as on September 30, 2023 and Tk. 37.10 as on December 31, 2022.

ISLAMICFIN

(Q3 Un-audited): EPS was Tk. (2.16) for July-September 2023 as against Tk. (0.55) for July-September 2022; EPS was Tk. (2.14) for January-September 2023 as against Tk. 0.07 for January-September 2022. NOCFPS was Tk. (1.84) for January-September 2023 as against Tk. (15.14) for January-September 2022. NAV per share was Tk. 11.92 as on September 30, 2023 and Tk. 14.33 as on September 30, 2022.

NAVANAPHAR

The Board of Directors has recommended 13% Cash Dividend for the year ended June 30, 2023. Date of AGM: 28.12.2023, Time: 4:00 PM, Venue: Digital Platform. Record Date: 19.11.2023. The Company has also reported EPS of Tk. 3.59, NAV per share of Tk. 40.71 and NOCFPS of Tk. 1.80 for the year ended June 30, 2023 as against Tk. 3.42, Tk. 43.41 and Tk. 2.48 respectively for the year ended June 30, 2022.

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CRYSTALINS

(Q3 Un-audited): EPS was Tk. 0.52 for July-September 2023 as against Tk. 0.71 for July-September 2022; EPS was Tk. 2.31 for January-September 2023 as against Tk. 2.01 for January-September 2022. NOCFPS was Tk. 1.21 for January-September 2023 as against Tk. 3.69 for January-September 2022. NAV per share was Tk. 25.25 as on September 30, 2023 and Tk. 24.31 as on December 31, 2022.

CROWNCEMNT

The Board of Directors has recommended 20% Cash Dividend for the year ended June 30, 2023. Date of AGM: 20.12.2023, Time: 3:00 PM, Venue: Digital Platform. Record Date: 20.11.2023. The Company has also reported EPS of Tk. 4.11, NAV per share of Tk. 52.22 and NOCFPS of Tk. 11.43 for the year ended June 30, 2023 as against Tk. (1.54), Tk. 49.18 and Tk. 21.83 respectively for the year ended June 30, 2022.

RAHIMAFOOD

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2023. Date of AGM: 10.12.2023, Time: 3:30 PM, Venue: Digital Platform, through link: <https://rahimafood.bdvirtualagm.com>. Record Date: 15.11.2023. The Company has also reported EPS of Tk. 1.03, NAV per share of Tk. 10.31 and NOCFPS of Tk. (2.52) for the year ended June 30, 2023 as against Tk. 0.29, Tk. 9.53 and Tk. 0.02 respectively for the year ended June 30, 2022.

BEACONPHAR

The Board of Directors has recommended 16% Cash Dividend for the year ended June 30, 2023. Date of AGM: 24.12.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 16.11.2023. The Company has also reported EPS of Tk. 2.21, NAV per share of Tk. 25.72 and NOCFPS of Tk. 2.69 for the year ended June 30, 2023 as against Tk. 4.05, Tk. 25.73 and Tk. 4.68 respectively for the year ended June 30, 2022.

NCCBANK

Mr. M. A. Quasem, one of the Sponsors of the company, has expressed his intention to transfer 1,00,000 shares of the company to his wife Ms. Munira Begam Munni (General Shareholder of the company), by way of gift outside the trading system of the Exchange within October 31, 2023.

TB10Y0833

Trading of 10Y BGTB 16/08/2033 Government Securities will commence at DSE from today i.e., October 23, 2023 under 'A' category. DSE Trading Code is "TB10Y0833" and DSE Scrip Code is 88505. Some other salient features: 1. Issuer: Bangladesh Bank, 2. Issue price: BDT 102.2977 per bond, 3. Face value: BDT 100 per bond, 4. Market lot: 1000, 5. Tenure: 10 years, 6. Coupon rate: 9.20%, 7. Coupon payment frequency: 2 (Two).

PBLPBOND

DSEMG T will buy Pubali Bank Perpetual Bond(Demated) (quantity:2) from BUYIN Market today (23.10.2023). Willing seller(s) are requested to intimate DSE Clearing House prior to placing sale order. Once trade is executed, Selling Broker(s) are also requested to transfer the shares to DSE Clearing A/C (BO ID # 1100001000000035) from Broker Clearing A/C using Pay-Out Process within 2:30 PM.

MIDASFIN

Mr. Mohammed Ikramullah, one of the Sponsors of the company, has expressed his intention to sell 9,65,210 shares out of his holding of 10,42,691 shares of the Company at prevailing market price (In the Public/Block Market) through Dhaka Stock Exchange Limited (DSE) within October 31, 2023.

MERCANBANK

Mr. A.S.M. Feroz Alam, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 2,10,000 shares of the company through Dhaka Stock Exchange Limited as per declaration disseminated on 19.10.2023.

OLYMPIC

The Company has informed that the Board of Directors has decided to appoint Mrs. Nurjehan Hudda, Director and Acting Managing Director of the company with effect from October 19, 2023.

NCCBANK

Mr. M. A. Quasem, one of the Sponsors of the company, has further informed that he has completed his sale of 1,40,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited (DSE) as per declaration news disseminated by DSE on 17.10.2023.

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