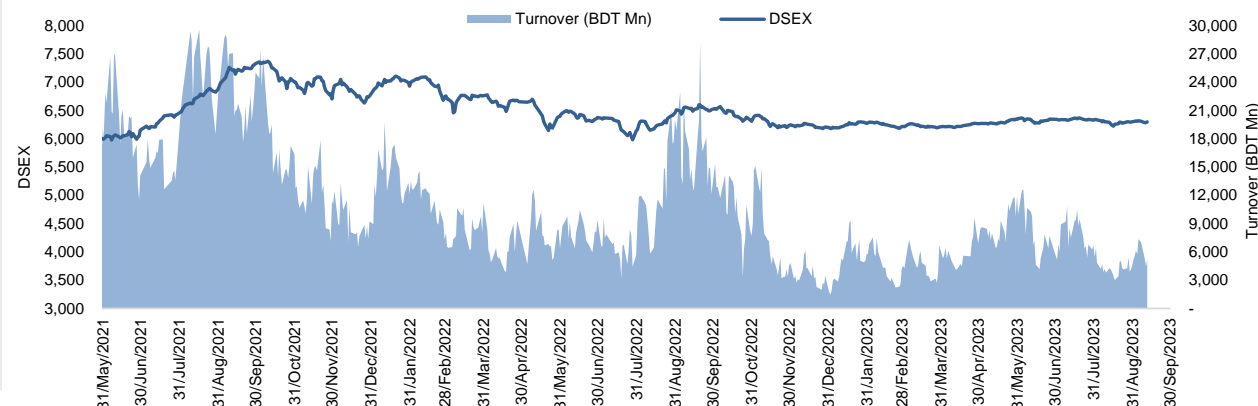


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.27%) gained 16.7 points and closed at 6,300.56. The blue-chip index DS30 (+0.24%), the Shariah-based index DSES (+0.18%), and the large-cap index CDSET (0.00%) closed at 2,133.97, 1,364.26, and 1,207.45 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.12% followed by Pharmaceutical (+0.11%), Engineering (+0.02%). Fuel & Power experienced the highest loss of 0.02% followed by Bank (0.00%), NBFI (0.00%). Block trades contributed 9.4% of the overall market turnover. Fu Wang Food Ltd. (+2.7%) was the most traded share with a turnover of BDT 344 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,300.56	6,283.86	+16.70	+0.27%	+1.5%
DS30	2,133.97	2,128.91	+5.06	+0.24%	-2.8%
DSES	1,364.26	1,361.84	+2.42	+0.18%	+0.4%
CDSET	1,207.45	1,207.49	-0.04	-0.00%	-0.6%

	Advanced	Declined	Unchanged	Total
All Category	118	29	151	298
A Category (Equity)	73	16	100	189
B Category (Equity)	36	8	46	90
N Category (Equity)	3	0	1	4
Z Category (Equity)	6	5	4	15
Mutual Funds	0	1	13	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	7,757,835	7,748,874	+0.1%
	Mn USD	70,526	70,444	
Turnover	Mn BDT	5,228	4,460	+17.2%
	Mn USD	48	41	
Volume	Mn Shares	98	93	+5.2%
No. of Trade		122,507	110,411	+11.0%

\* Average Interbank Exchange Rate is BDT 110.00 as of Sep 12, 2023

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Figure: Sectorial Turnover (BDT Mn)

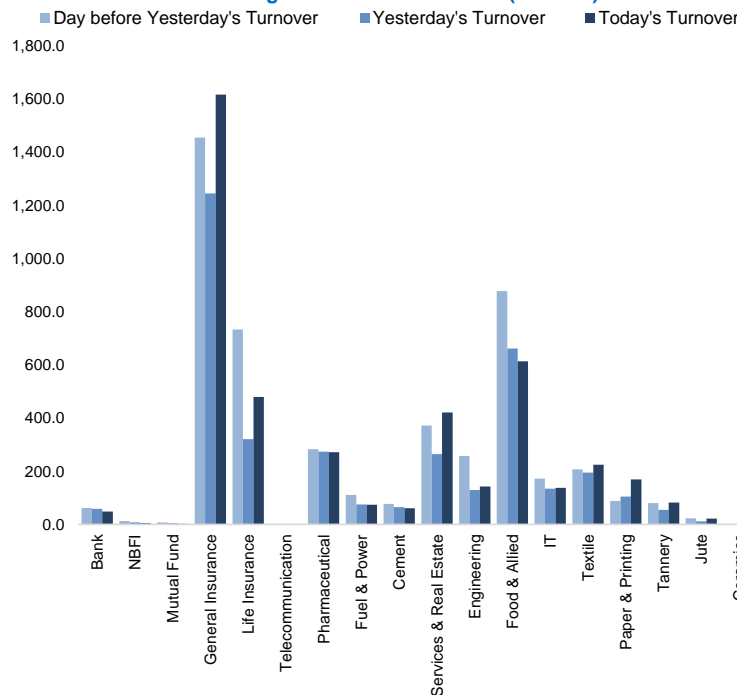
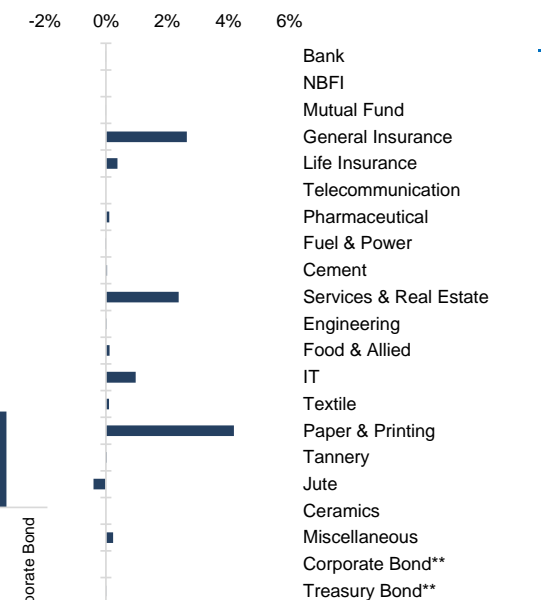


Figure: Sectorial Mcap Change



Market PE 18.5x

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	1,447	1,447	-0.03	-0.00%	35	681,901	8.8%	48.8	1.0%	12.1x	0.7x	GP	386,996	8.5%	0.1	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,555	2.4%	4.0	0.1%	NM	6.9x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	827	827	-0.04	-0.01%	36	37,419	0.5%	2.2	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.2	15.4x	6.2x
General Insurance	3,798	3,700	+97.98	+2.65%	42	110,861	1.4%	1,616.7	34.1%	20.6x	1.7x	SQURPHARMA	186,155	4.1%	93.3	9.9x	1.7x
Life Insurance	2,693	2,683	+10.11	+0.38%	15	75,264	1.0%	479.4	10.1%	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	3,717	3,713	+4.10	+0.11%	34	721,055	9.3%	272.0	5.7%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,700	1,700	-0.37	-0.02%	23	448,420	5.8%	74.5	1.6%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,544	2,543	+1.00	+0.04%	7	122,186	1.6%	61.1	1.3%	26.9x	2.6x	BERGERPBL	86,736	1.9%	2.0	28.3x	6.2x
Services & Real Esta	1,848	1,805	+42.97	+2.38%	8	73,026	0.9%	420.9	8.9%	24.4x	1.2x	MARICO	80,016	1.8%	3.3	19.2x	16.3x
Engineering	4,486	4,485	+0.86	+0.02%	42	526,480	6.8%	142.6	3.0%	58.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,522	21,496	+26.53	+0.12%	21	398,248	5.1%	613.3	13.0%	20.0x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,085	3,056	+29.69	+0.97%	11	40,224	0.5%	138.0	2.9%	28.4x	2.9x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,628	1,627	+1.60	+0.10%	58	170,461	2.2%	224.2	4.7%	79.4x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,792	10,359	+433.32	+4.18%	6	41,581	0.5%	169.2	3.6%	40.1x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,210	3,209	+1.07	+0.03%	6	33,907	0.4%	82.5	1.7%	46.4x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	15,824	15,889	-64.78	-0.41%	3	3,871	0.1%	21.8	0.5%	NM	-1343.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	1.4	0.0%	53.4x	1.9x	UNILEVERCL	38,874	0.9%	3.4	45.0x	22.1x
Miscellaneous	4,238	4,228	+9.99	+0.24%	14	230,754	3.0%	361.1	7.6%	16.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,139	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	3,190,529	41.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIRACLEIND	57.4	+10.0%	200.9	NM	1.9x
CRYSTALINS	85.4	+9.9%	104.1	26.3x	3.4x
MERCINS	37.9	+9.9%	43.2	20.9x	1.7x
PARAMOUNT	60.7	+6.9%	161.9	40.7x	2.3x
DAFODILCOM	83.3	+6.7%	49.5	NM	6.1x
EHL	101.7	+6.3%	173.7	13.8x	1.3x
MEGHNALIFE	85.3	+6.2%	179.7	NM	NM
SONALIPAPR	673.4	+5.6%	94.0	72.0x	3.9x
CONTININS	51.3	+5.1%	176.1	85.5x	2.4x
MONOSPOOL	252.7	+4.9%	15.5	33.5x	5.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LEGACYFOOT	113.5	-2.6%	77.3	NM	12.7x
AMBEEPHA	676.1	-2.6%	5.2	NM	36x
TOSRIFA	28.8	-2.4%	4.8	15.9x	0.9x
ANLIMAYARN	32.8	-1.8%	3.7	91.1x	3.1x
ADNTEL	123.6	-1.7%	25.4	32.1x	4.5x
OIMEX	20.3	-1.5%	6.7	NM	1.8x
JUTESPINN	324.3	-1.2%	0.3	NM	NM
PUBALIBANK	26.8	-1.1%	1.0	4.6x	0.6x
UNIONINS	59.5	-1.0%	39.6	24.2x	3.3x
PRIMELIFE	53.2	-0.9%	12.8	NM	NM

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%	13.5x	4.0x
PUBALIBANK	19,162	1.1%	4.6x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	17.8x	2.9x
ROBI	15,714	0.9%	69.8x	2.5x
ALARABANK	14,357	0.8%	15.7x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
SEAPEARL	13,733	0.8%	24.0x	9.6x
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
FUWANGFOOI	38.5	+2.7%	344.3	NM	9.7x
MIRACLEIND	57.4	+10.0%	200.9	NM	1.9x
MEGHNALIFE	85.3	+6.2%	179.7	NM	NM
CONTININS	51.3	+5.1%	176.1	85.5x	2.4x
EHL	101.7	+6.3%	173.7	13.8x	1.3x
PARAMOUNT	60.7	+6.9%	161.9	40.7x	2.3x
SEAPEARL	165.9	+2.7%	149.3	24.0x	9.6x
RUPALIINS	34.9	+3.9%	143.5	35.6x	1.6x
RUPALILIFE	114.3	+0.4%	131.6	NM	NM
EASTERNINS	65.0	+3.3%	122.2	21.0x	1.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONALIPAPR	684.0	660.0	5.0	154	102.32
BRACBANK	32.3	32.3	12.0	1,850	59.77
CITYGENINS	46.0	46.0	1.0	1,000	46.00
SEAPEARL	163.0	163.0	1.0	270	44.01
CRYSTALINS	85.3	77.3	4.0	372	29.39
EMERALDOIL	142.1	136.5	4.0	208	29.35
HRTEX	119.0	104.4	19.0	262	29.05
AL-HAJTEX	175.0	173.0	3.0	118	20.55
BEACONPHAR	223.7	223.6	3.0	91	20.27
FINEFOODS	125.1	109.0	2.0	115	13.21

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	684.0	660.0	102.3	154	5
BRACBANK	32.3	32.3	59.8	1,850	12
CITYGENINS	46.0	46.0	46.0	1,000	1
SEAPEARL	163.0	163.0	44.0	270	1
CRYSTALINS	85.3	77.3	29.4	372	4
EMERALDOIL	142.1	136.5	29.4	208	4
HRTEX	119.0	104.4	29.0	262	19
AL-HAJTEX	175.0	173.0	20.6	118	3
BEACONPHAR	223.7	223.6	20.3	91	3
FINEFOODS	125.1	109.0	13.2	115	2
LRBDL	34.6	31.6	11.0	345	9
IPDC	54.9	53.0	10.4	191	2
SIMTEX	26.9	26.2	7.4	280	3
GP	261.6	261.6	7.4	28	8
RDFOOD	48.9	48.9	6.9	141	1
PARAMOUNT	56.5	51.2	5.0	90	2
SOUTHEASTB	12.5	12.5	5.0	400	1
CONTININS	49.2	49.2	4.9	100	2
ISNLTD	45.6	45.6	4.8	105	1
CNATEX	9.2	9.2	4.6	500	1
JAMUNABANK	19.2	18.9	4.5	235	4
EXIMBANK	9.5	9.4	2.5	268	4
<b>Total</b>			<b>493.5</b>		<b>126</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BSCCL		0.0%	51%	Record Date	20-Sep-23
IBNSINA		0.0%	60%	Record Date	21-Sep-23
BIFC		0.0%	0%	Record Date	26-Sep-23
PRIMELIFE		0.0%	0%	Record Date	27-Sep-23
WALTONHIL		300.0%	0%	Record Date	2-Oct-23
UNIONCAP		0.0%	0%	Record Date	4-Oct-23
PHOENIXFIN		0.0%	0%	Record Date	12-Oct-23
EHL		0.0%	25%	Record Date	18-Oct-23

#### Important DSE News

##### BDLAMPS

The Company has informed that the Board of Directors of the Company has decided to set up a production line for manufacturing plastic parts of Tube Light at its existing factory located at Ghashirdia, Shaspur, Shibpur PS, Narsingdi. The expected cost for the project will be Tk 1.11 crore. The cost of the project will be arranged by bank borrowings. The Board of Directors of the Company has also decided to outsource GLS Bulbs and discontinue of GLS production line.

##### SUNLIFEINS

ARGUS Credit Rating Services Limited (ACRSL) has announced the CPA (Claim Paying Ability) rating of the Company as "A-" in the long term and "ST-3" in the short term in consideration of financials of the Company up to December 31, 2022 (audited), Q2FY23 (un-audited) and other relevant quantitative as well as qualitative information up to the date of rating declaration.

##### MERCANBANK

Engr. Md. Monsuruzzaman, one of the Sponsors of the company, has expressed his intention to transfer 5,30,000 shares out of his holding of 15,30,000 shares of the company to his wife Sultana Ferdausi Begum (General Shareholder of the company), by way of gift outside the trading system of the Exchange within 30 working days with effect from September 07, 2023.

##### LEGACYFOOT

Refer to the earlier news disseminated by DSE on 11.04.2023 regarding BSEC consent for issuance of Ordinary Shares, the company has further informed that it has issued 30,000,000 shares of Tk. 10 each to 3 (three) existing sponsors and/or directors and 14 (fourteen) other than existing shareholders. List of the allottees as per Return of Allotment Form- XV of RJSC submitted by the company is as follows: 1. Riverstone- 19,24,000 shares; 2. Quazi Rafi Ahmad- 8,99,462 shares; 3. NSRA Equities Ltd.- 17,25,000 shares; 4. MK Footwear PLC.- 17,25,000 shares; 5. Quazi Aziz Ahmed- 5,33,000 shares; 6. NASCFS Equities Ltd.- 81,50,000 shares, 7. Quazi Nafees Ahmed- 4,29,538 shares, 8. Ahmed Farabi Chowdhury- 20,00,000 shares, 9. Nirod Barua- 8,80,000 shares, 10. SAM Equities Ltd.- 17,25,000 shares, 11. Hayat Trade International- 17,50,000 shares, 12. Sea Pearl Beach Resort & Spa Ltd.- 5,45,000 shares, 13. M/S Habib Enterprise-17,50,000 shares, 14. Shirinta Sabeen Choudhury- 9,50,000 shares, 15. TS Equity & Ventures Ltd.- 22,50,000 shares, 16. Md. Aminul Haque- 8,40,000 shares and 17. M/S Lamim Enterprise- 19,24,000 shares. However, it is observed that BSEC accorded its consent to issue shares to the existing and other than existing shareholders whereas the company allotted the shares to only 3 (three) existing sponsors and/or directors and 14 (fourteen) other than existing shareholders. DSE sent a query to the company to clarify their position regarding why shares are issued to only the existing sponsors and/or directors and also why they did not submit any PSI regarding purpose of the capital issue as required in the consent letter of BSEC. The company has declared the record date on September 27, 2023 for crediting the shares in dematerialized form to BO accounts of the above investors.

##### DHAKABANK

Mr. Mirza Yasser Abbas, one of the Directors of the company, has submitted a declaration to receive 1,30,00,000 shares from his father Mr. Mirza Abbas Uddin Ahmed (General shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days with effect from September 07, 2023.

##### EASTERNINS

Dhaka Stock Exchange Limited (DSE) has accorded its consent to transfer total 753,900 shares of Eastern Insurance Company Ltd. comprising 382,000 shares of Umme Kulsum Mannan, a sponsor director of the company; 201,100 shares of Sunman Sweaters Limited, a director of the company; 170,800 shares of Alfa Textiles Ltd., a public shareholder director of the company to Commercial Bank of Ceylon PLC (the transferee) within 30 working days with effect from September 11, 2023 under Regulation-47 of the Dhaka Stock Exchange (Listing) Regulations, 2015.

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