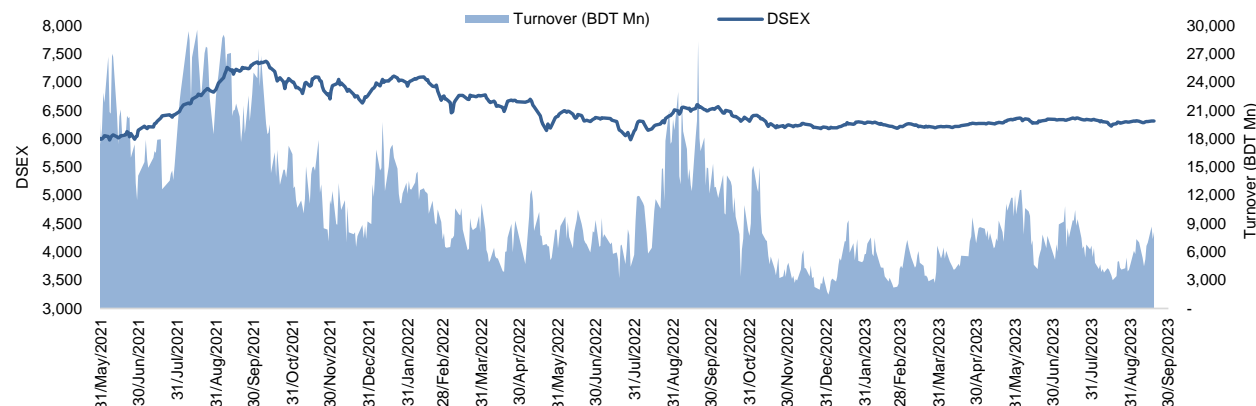


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.00%) gained 0.1 points and closed at 6,311.08. The blue-chip index DS30 (+0.02%), the Shariah-based index DSES (-0.12%), and the large-cap index CDESET (+0.04%) closed at 2,139.01, 1,359.75, and 1,208.02 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.03% followed by Pharmaceutical (-0.03%), Fuel & Power (-0.02%), Engineering (-0.02%), NBFI (-0.02%), Food & Allied (-0.01%), and Telecommunication (0.00%), respectively. Block trades contributed 4.7% of the overall market turnover. Provati Insurance Company Limited (-3.3%) was the most traded share with a turnover of BDT 324 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|--------|----------|----------|---------|--------|--------|
| DSEX | 6,311.08 | 6,310.98 | +0.10 | +0.00% | +1.7% |
| DS30 | 2,139.01 | 2,138.57 | +0.44 | +0.02% | -2.6% |
| DSES | 1,359.75 | 1,361.37 | -1.62 | -0.12% | +0.1% |
| CDESET | 1,208.02 | 1,207.52 | +0.50 | +0.04% | -0.5% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 69 | 85 | 160 | 314 |
| A Category (Equity) | 51 | 45 | 105 | 201 |
| B Category (Equity) | 11 | 36 | 46 | 93 |
| N Category (Equity) | 3 | 0 | 0 | 3 |
| Z Category (Equity) | 4 | 4 | 9 | 17 |
| Mutual Funds | 0 | 1 | 14 | 15 |
| Corporate Bonds | 0 | 0 | 1 | 1 |
| Treasury Bonds | 0 | 0 | 0 | 0 |

* Based on Traded Scripts

| | | Today | Last Day | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap | Mn BDT | 7,764,145 | 7,763,747 | +0.0% |
| | Mn USD | 70,583 | 70,580 | |
| Turnover | Mn BDT | 8,117 | 7,346 | +10.5% |
| | Mn USD | 74 | 67 | |
| Volume | Mn Shares | 150 | 137 | +9.3% |
| | | | | |
| No. of Trade | | 189,704 | 170,156 | +11.5% |

* Average Interbank Exchange Rate is BDT 110.00 as of Sep 19, 2023

| | |
|---|---|
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|---|---|

Figure: Sectorial Turnover (BDT Mn)

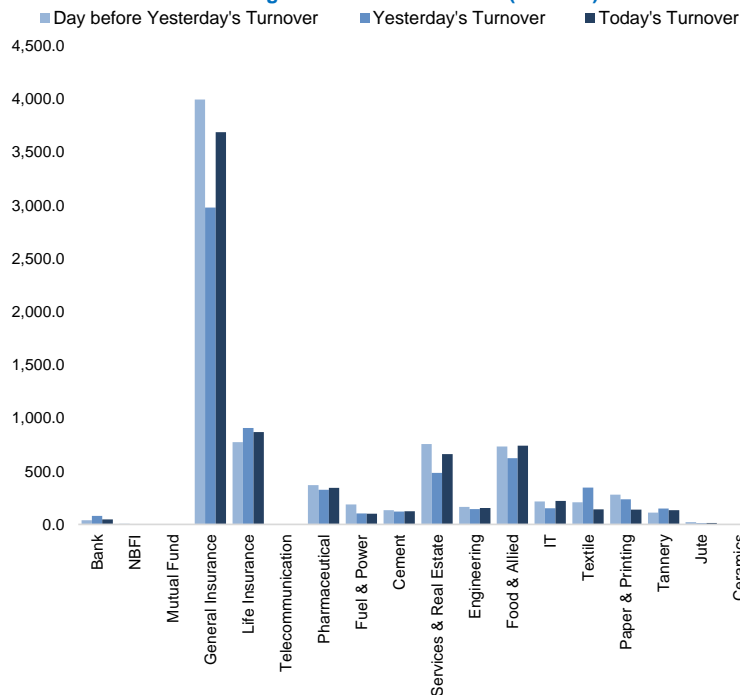
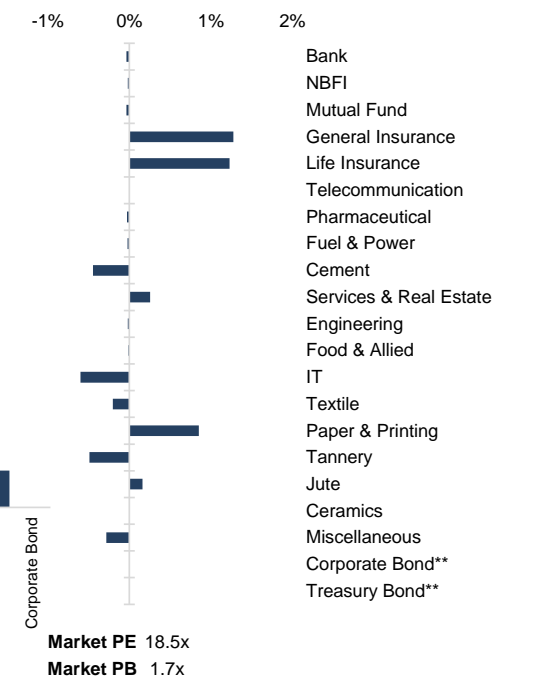


Figure: Sectorial Mcap Change



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 | 1,444 | 1,444 | -0.49 | -0.03% | 35 | 681,305 | 8.8% | 47.5 | 0.6% | 12.1x | 0.7x | GP | 386,996 | 8.5% | 0.1 | 11.9x | 7.3x |
| NBFI | 1,917 | 1,917 | -0.35 | -0.02% | 23 | 186,520 | 2.4% | 3.5 | 0.0% | NM | 6.9x | WALTONHIL | 317,378 | 7.0% | 0.1 | 40.5x | 3.0x |
| Mutual Fund | 827 | 827 | -0.30 | -0.04% | 36 | 37,407 | 0.5% | 2.7 | 0.0% | NM | 0.7x | BATBC | 280,098 | 6.2% | 0.2 | 15.4x | 6.2x |
| General Insurance | 4,171 | 4,119 | +52.57 | +1.28% | 42 | 121,686 | 1.6% | 3,687.3 | 47.7% | 22.6x | 1.9x | SQURPHARMA | 186,155 | 4.1% | 32.4 | 9.9x | 1.7x |
| Life Insurance | 2,770 | 2,737 | +33.61 | +1.23% | 15 | 77,435 | 1.0% | 869.5 | 11.2% | NM | NM | ROBI | 157,138 | 3.5% | 0.0 | 69.8x | 2.5x |
| Telecommunication | 4,946 | 4,946 | - | - | 3 | 580,232 | 7.5% | 0.1 | 0.0% | 15.6x | 4.4x | RENATA | 139,689 | 3.1% | 0.1 | 38.0x | 4.6x |
| Pharmaceutical | 3,711 | 3,712 | -1.09 | -0.03% | 34 | 719,782 | 9.3% | 344.4 | 4.5% | 19.2x | 2.3x | UPGDCL | 135,475 | 3.0% | 0.0 | 16.7x | 4.4x |
| Fuel & Power | 1,699 | 1,699 | -0.34 | -0.02% | 23 | 448,155 | 5.8% | 100.5 | 1.3% | 23.6x | 1.1x | BEXIMCO | 103,571 | 2.3% | 0.0 | 12.0x | 1.2x |
| Cement | 2,561 | 2,573 | -11.43 | -0.44% | 7 | 123,025 | 1.6% | 124.1 | 1.6% | 27.1x | 2.7x | BERGERPBL | 85,961 | 1.9% | 2.4 | 28.1x | 6.2x |
| Services & Real Esta | 1,880 | 1,876 | +4.78 | +0.25% | 8 | 74,290 | 1.0% | 660.4 | 8.5% | 23.1x | 1.2x | LHBL | 80,483 | 1.8% | 84.8 | 13.7x | 4.1x |
| Engineering | 4,478 | 4,479 | -0.86 | -0.02% | 42 | 525,934 | 6.8% | 154.3 | 2.0% | 58.4x | 1.8x | ICB | 74,119 | 1.6% | 0.0 | NM | 1.7x |
| Food & Allied | 21,489 | 21,492 | -2.72 | -0.01% | 21 | 397,625 | 5.1% | 739.8 | 9.6% | 20.0x | 7.5x | BXPHARMA | 65,222 | 1.4% | 0.0 | 14.6x | 1.5x |
| IT | 3,043 | 3,062 | -18.34 | -0.60% | 11 | 39,676 | 0.5% | 221.7 | 2.9% | 28.0x | 2.9x | BRACBANK | 57,596 | 1.3% | 0.2 | 8.3x | 0.9x |
| Textile | 1,617 | 1,620 | -3.28 | -0.20% | 58 | 169,229 | 2.2% | 142.0 | 1.8% | 78.9x | 1.2x | BEACONPHAR | 56,595 | 1.2% | 0.0 | 80.9x | 9.2x |
| Paper & Printing | 10,690 | 10,600 | +90.30 | +0.85% | 6 | 41,189 | 0.5% | 138.1 | 1.8% | 39.7x | 2.1x | ISLAMIBANK | 52,486 | 1.2% | 0.0 | 8.4x | 0.7x |
| Tannery | 3,198 | 3,214 | -15.67 | -0.49% | 6 | 33,781 | 0.4% | 134.5 | 1.7% | 46.2x | 3.2x | DUTCHBANGL | 44,203 | 1.0% | 0.1 | 7.9x | 1.0x |
| Jute | 15,605 | 15,580 | +25.09 | +0.16% | 3 | 3,818 | 0.0% | 14.2 | 0.2% | NM | -1325.2x | TITASGAS | 40,459 | 0.9% | 0.0 | 32.0x | 0.6x |
| Ceramics | 680 | 680 | - | - | 5 | 31,446 | 0.4% | 1.0 | 0.0% | 53.4x | 1.9x | UNILEVERCL | 38,886 | 0.9% | 0.7 | 45.0x | 22.1x |
| Miscellaneous | 4,195 | 4,207 | -11.81 | -0.28% | 14 | 228,405 | 2.9% | 346.2 | 4.5% | 16.1x | 1.8x | POWERGRID | 37,347 | 0.8% | 0.0 | NM | 0.4x |
| Corporate Bond** | 88 | 88 | - | - | 10 | 35,134 | 0.5% | 0.1 | 0.0% | NM | NM | SUMITPOWER | 36,308 | 0.8% | 0.2 | 12.1x | 0.9x |
| Treasury Bond** | 88 | 88 | +0.00 | +0.00% | 240 | 3,190,816 | 41.2% | 0.0 | 0.0% | NM | NM | | | | | | |

| Top Ten Gainers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|-----------------|-------------------|--------|-------------------|-------|-------|
| JANATAINS | 46.3 | +10.0% | 90.7 | 32.9x | 3.0x |
| ASIAINS | 61.1 | +9.9% | 220.3 | 29.1x | 2.2x |
| UNITEDINS | 55.9 | +9.8% | 36.1 | 35.2x | 1.7x |
| TILIL | 65.5 | +8.3% | 147.7 | NM | NM |
| SANDHANINS | 30.2 | +6.0% | 74.9 | NM | NM |
| PIONEERINS | 84.1 | +5.9% | 145.2 | 15.3x | 1.8x |
| SEAPEARL | 179.8 | +5.1% | 175.4 | 26.1x | 10x |
| EASTERNINS | 72.4 | +4.9% | 138.6 | 23.4x | 1.4x |
| IMAMBUTTON | 121.8 | +4.8% | 9.1 | NM | 25.3x |
| SHYAMPSUG | 97.0 | +4.2% | 2.5 | NM | NM |

| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|----------------|-------------------|-------|-------------------|-------|------|
| METROSPIN | 27.4 | -9.9% | 14.0 | 28.0x | 1.3x |
| LEGACYFOOT | 80.0 | -8.5% | 90.3 | NM | 9x |
| MIRACLEIND | 46.6 | -7.2% | 171.4 | NM | 1.5x |
| MEGHNAPEP | 30.6 | -5.6% | 3.4 | NM | NM |
| SIMTEX | 23.1 | -4.5% | 33.9 | 25.4x | 1.0x |
| FUWANGFOOD | 32.4 | -4.4% | 238.2 | NM | 8.2x |
| YPL | 24.2 | -4.0% | 42.9 | NM | 4.5x |
| GQBALLPEN | 109.4 | -3.9% | 6.3 | NM | 0.9x |
| RDFOOD | 41.4 | -3.7% | 53.3 | 33.7x | 2.6x |
| UNIQUEHRL | 68.8 | -3.4% | 302.8 | 10.7x | 0.8x |

| 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% | 13.7x | 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% | 17.9x | 3.0x |
| 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% | 26.1x | 10.4x |
| UPGDCL | 13,547 | 0.8% | 16.7x | 4.4x |
| PRIMEBANK | 13,491 | 0.8% | 5.1x | 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 |
|-------------------|-------------------|-------|-------------------|-------|-------|
| PROVATIINS | 65.4 | -3.3% | 323.6 | 34.3x | 3.1x |
| UNIQUEHRL | 68.8 | -3.4% | 302.8 | 10.7x | 0.8x |
| FUWANGFOOD | 32.4 | -4.4% | 238.2 | NM | 8.2x |
| ASIAINS | 61.1 | +9.9% | 220.3 | 29.1x | 2.2x |
| GEMINISEA | 816.8 | +3.4% | 209.3 | 38.9x | 32.2x |
| MEGHNALIFE | 90.7 | +3.3% | 203.1 | NM | NM |
| RUPALILIFE | 121.5 | +2.2% | 187.9 | NM | NM |
| EHL | 100.2 | -1.6% | 175.4 | 13.6x | 1.3x |
| SEAPEARL | 179.8 | +5.1% | 175.4 | 26.1x | 10.4x |
| MIRACLEIND | 46.6 | -7.2% | 171.4 | NM | 1.5x |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| BRACBANK | 32.3 | 32.3 | 12.0 | 4,310 | 139.22 |
| ISLAMIINS | 55.9 | 55.9 | 1.0 | 823 | 46.02 |
| ISNLTD | 43.6 | 43.6 | 3.0 | 655 | 28.56 |
| SIMTEX | 26.1 | 25.0 | 8.0 | 740 | 19.12 |
| FAREASTLIF | 69.9 | 67.5 | 15.0 | 180 | 12.17 |
| CRYSTALINS | 118.9 | 118.8 | 2.0 | 100 | 11.89 |
| JANATAINS | 46.3 | 42.6 | 5.0 | 248 | 11.26 |
| UNIONINS | 61.3 | 61.2 | 2.0 | 158 | 9.68 |
| METROSPIN | 33.4 | 33.3 | 5.0 | 209 | 6.99 |
| SINGERBD | 142.1 | 141.3 | 8.0 | 43 | 6.15 |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| BRACBANK | 32.3 | 32.3 | 139.2 | 4,310 | 12 |
| ISLAMIINS | 55.9 | 55.9 | 46.0 | 823 | 1 |
| ISNLTD | 43.6 | 43.6 | 28.6 | 655 | 3 |
| SIMTEX | 26.1 | 25.0 | 19.1 | 740 | 8 |
| FAREASTLIF | 69.9 | 67.5 | 12.2 | 180 | 15 |
| CRYSTALINS | 118.9 | 118.8 | 11.9 | 100 | 2 |
| JANATAINS | 46.3 | 42.6 | 11.3 | 248 | 5 |
| UNIONINS | 61.3 | 61.2 | 9.7 | 158 | 2 |
| METROSPIN | 33.4 | 33.3 | 7.0 | 209 | 5 |
| SINGERBD | 142.1 | 141.3 | 6.1 | 43 | 8 |
| FORTUNE | 83.2 | 68.2 | 5.2 | 73 | 7 |
| BBSCABLES | 48.9 | 45.0 | 4.8 | 105 | 2 |
| IBNSINA | 266.0 | 261.6 | 4.7 | 18 | 9 |
| GEMINISEA | 795.0 | 790.0 | 4.6 | 6 | 3 |
| CNATEX | 9.5 | 9.5 | 4.3 | 453 | 6 |
| LRBDL | 31.7 | 31.6 | 3.8 | 121 | 5 |
| GOLDENSON | 16.4 | 16.4 | 3.3 | 200 | 1 |
| SEAPEARL | 174.0 | 161.0 | 3.2 | 19 | 3 |
| MONNOFABR | 21.8 | 21.7 | 3.0 | 140 | 6 |
| ADNTEL | 131.0 | 123.0 | 2.7 | 21 | 3 |
| SONALILIFE | 89.0 | 89.0 | 2.5 | 28 | 1 |
| BEACONPHAR | 223.7 | 223.7 | 2.5 | 11 | 1 |
| Total | | | 384.8 | | 159 |

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 |
| AGRANINS | | 7.0% | 0% | 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

UNIQUEHRL

The Board of Directors has recommended 20% Cash Dividend for the year ended June 30, 2023. Date of AGM: 12.12.2023, Time: 10:30 AM, Venue: Digital Platform. Record Date: 23.10.2023. The Company has reported EPS of Tk. 6.42, NAV per share of Tk. 88.51 and NOCFPS of Tk. 5.13 for the year ended June 30, 2023 as against Tk. 3.34 (restated), Tk. 84.91 (restated) and Tk. 0.60 (restated) respectively for the year ended June 30, 2022. The company has also informed that the income as well as EPS of the company has increased to Taka 6.42 per share during the year ended June 30, 2023, out of which, EPS from business operation comes to Taka 2.06. The revenue has increased during the reporting period by 55% from the previous year. Moreover, there has been an unrealized gain on investment in quoted share at Chartered Life Insurance Co. Ltd. amounting to Taka 154,577,130 with an impact of Taka 0.53 per share in the earnings per share of the Company. Furthermore, the company has recorded capital gain on sale of 2.45% ordinary shares of Unique Meghnaghat Power Limited during the year ended June 30, 2023; which amounts to Tk. 1,128,754,465; upon satisfaction of the condition precedents (CPs) of the Second and Third Closing as per Share Purchase Agreement. The aforesaid capital gain has an impact of Tk. 3.83 on the EPS of the company.

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