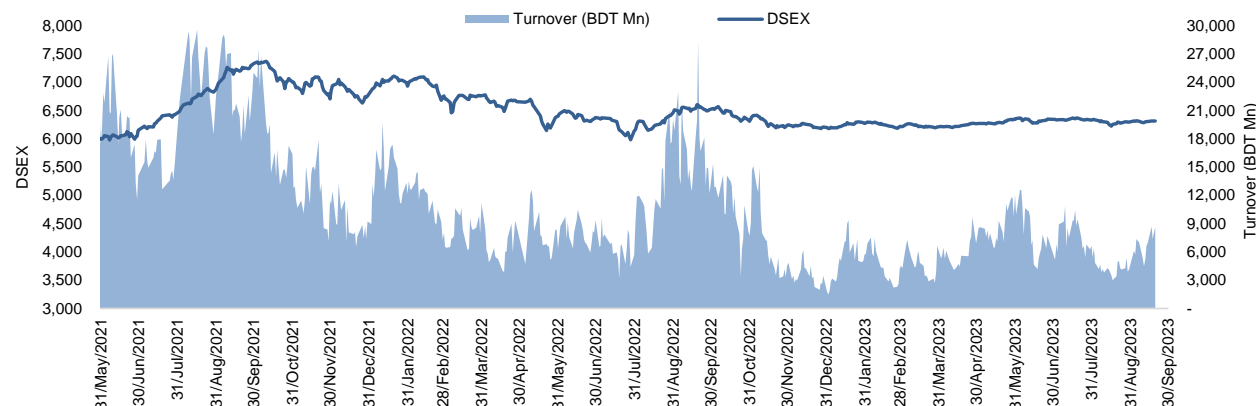


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.01%) lost 0.45 points and closed at 6,310.63. The blue-chip index DS30 (+0.09%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.01%) closed at 2,140.90, 1,361.64, and 1,208.18 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.12% followed by Engineering (+0.08%), Fuel & Power (+0.03%), Bank (+0.03%). Pharmaceutical experienced the highest loss of 0.03% followed by NBFI (0.00%), NBFI (0.00%). Block trades contributed 17.0% of the overall market turnover. Emerald Oil Industries Ltd. (-3.9%) was the most traded share with a turnover of BDT 437 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,310.63	6,311.08	-0.45	-0.01%	+1.7%
DS30	2,140.90	2,139.01	+1.88	+0.09%	-2.5%
DSES	1,361.64	1,359.75	+1.89	+0.14%	+0.2%
CDSET	1,208.18	1,208.02	+0.16	+0.01%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	78	77	167	322
A Category (Equity)	32	63	107	202
B Category (Equity)	37	10	47	94
N Category (Equity)	0	3	1	4
Z Category (Equity)	9	1	12	22
Mutual Funds	0	2	13	15
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,790,456	7,764,145	+0.3%
	Mn USD	70,822	70,583	
Turnover	Mn BDT	8,555	8,117	+5.4%
	Mn USD	78	74	
Volume	Mn Shares	151	150	+0.9%
No. of Trade		166,603	189,704	-12.2%

* Average Interbank Exchange Rate is BDT 110.00 as of Sep 20, 2023

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Figure: Sectorial Turnover (BDT Mn)

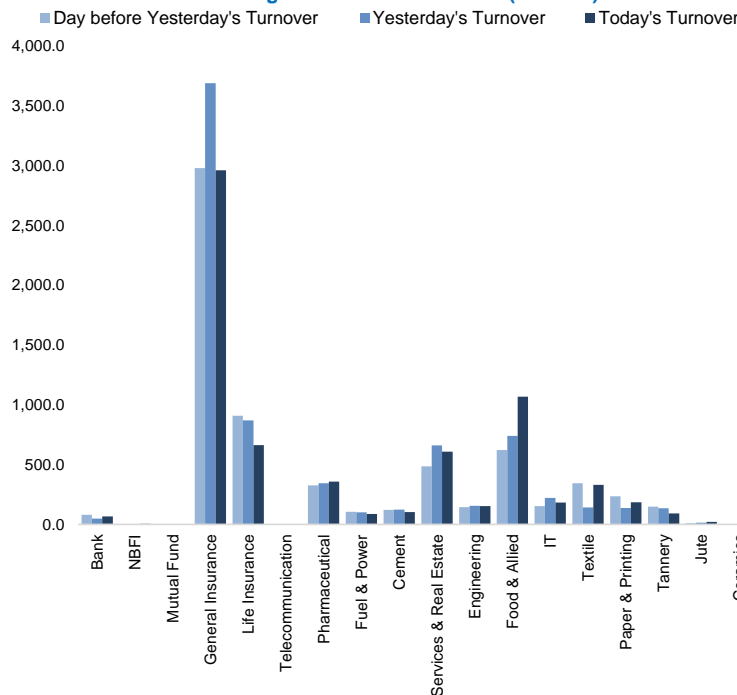
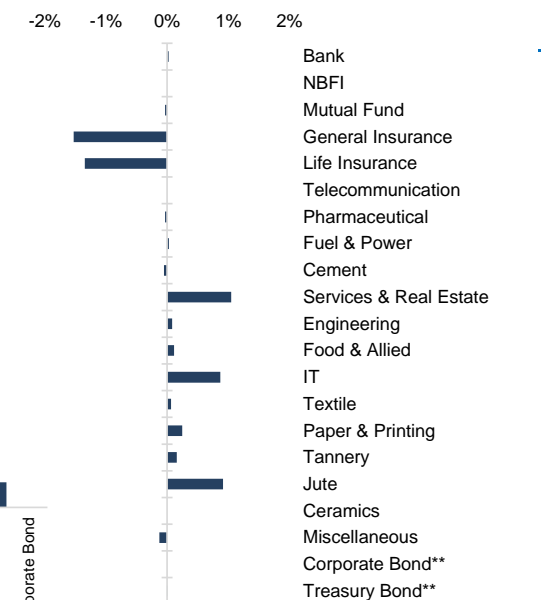


Figure: Sectorial Mcap Change



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	+0.37	+0.03%	35	681,481	8.8%	67.1	0.9%	12.1x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	5.0	0.1%	NM	6.9x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	827	827	-0.28	-0.03%	36	37,394	0.5%	2.8	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.6	15.4x	6.2x
General Insurance	4,108	4,171	-63.63	-1.53%	42	119,830	1.5%	2,960.5	41.7%	22.2x	1.9x	SQURPHARMA	186,155	4.1%	23.4	9.9x	1.7x
Life Insurance	2,733	2,770	-37.22	-1.34%	15	76,395	1.0%	663.4	9.3%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.3	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,709	3,711	-1.30	-0.03%	34	719,530	9.3%	358.3	5.0%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,699	1,699	+0.48	+0.03%	23	448,281	5.8%	86.5	1.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,560	2,561	-1.26	-0.05%	7	122,965	1.6%	103.2	1.5%	27.1x	2.7x	BERGERPBL	85,141	1.9%	2.8	27.8x	6.1x
Services & Real Esta	1,900	1,880	+19.70	+1.05%	8	75,068	1.0%	607.3	8.6%	23.4x	1.2x	LHBL	80,367	1.8%	48.1	13.6x	4.1x
Engineering	4,482	4,478	+3.69	+0.08%	42	526,368	6.8%	153.5	2.2%	58.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,514	21,489	+24.76	+0.12%	21	398,083	5.1%	1,067.9	15.0%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,070	3,043	+26.46	+0.87%	11	40,021	0.5%	182.3	2.6%	28.2x	2.9x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,618	1,617	+1.07	+0.07%	58	169,340	2.2%	330.5	4.7%	78.9x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,717	10,690	+26.50	+0.25%	6	41,292	0.5%	186.0	2.6%	39.8x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,204	3,198	+5.06	+0.16%	6	33,834	0.4%	92.1	1.3%	46.3x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	15,748	15,605	+142.92	+0.92%	3	3,853	0.0%	20.6	0.3%	NM	-1337.4x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.5	0.0%	53.4x	1.9x	UNILEVERCL	39,015	0.9%	1.2	45.1x	22.2x
Miscellaneous	4,190	4,195	-5.27	-0.13%	14	228,118	2.9%	209.6	3.0%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,134	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	241	3,190,898	41.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	106.7	+10.0%	2.6	NM	NM
ARAMITCEM	25.4	+10.0%	12.0	NM	26.2x
IMAMBUTTON	133.9	+9.9%	14.9	NM	27.8x
CRYSTALINS	126.3	+9.9%	145.4	38.9x	5.1x
KBPPWBIL	22.3	+9.9%	56.2	NM	1.9x
DGIC	41.3	+9.8%	140.1	45.4x	3.4x
MEGHNA PET	33.6	+9.8%	0.7	NM	NM
LEGACYFOOT	87.5	+9.4%	53.0	NM	9.8x
REPUBLIC	55.9	+8.8%	296.8	28.1x	3.2x
YPL	26.1	+7.9%	60.1	NM	4.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
STANDARINS	51.2	-6.1%	44.3	21.5x	2.3x
TILIL	62.1	-5.2%	73.2	NM	NM
NORTHRNINS	51.6	-4.3%	7.6	27.9x	2.1x
MEGHNALIFE	87.0	-4.1%	160.3	NM	NM
EMERALDOIL	151.1	-3.9%	437.5	NM	NM
NITOLINS	44.6	-3.9%	39.1	22.8x	1.4x
AGRANINS	50.1	-3.8%	70.8	25.3x	2.4x
RELIANCINS	79.5	-3.8%	45.5	15.5x	1.2x
BGIC	59.7	-3.6%	13.7	38.5x	2.9x
EASTLAND	30.2	-3.5%	31.8	18.8x	1.4x

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%	13.6x	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%	18.0x	3.0x
ROBI	15,714	0.9%	69.8x	2.5x
ALARABANK	14,357	0.8%	15.6x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
SEAPEARL	13,733	0.8%	26.6x	10.6x
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
EMERALDOIL	151.1	-3.9%	437.5	NM	NM
EHL	103.7	+3.5%	303.2	14.1x	1.3x
REPUBLIC	55.9	+8.8%	296.8	28.1x	3.2x
GEMINISEA	858.4	+5.1%	268.8	40.9x	33.8x
PARAMOUNT	73.8	-2.1%	257.4	49.5x	2.7x
METROSPIN	27.1	-1.1%	200.7	27.7x	1.3x
FUWANGFOOI	33.6	+3.7%	185.2	NM	8.5x
JANATAINS	46.2	-0.2%	175.2	32.8x	2.9x
ASIANS	59.3	-2.9%	171.5	28.2x	2.2x
MEGHNALIFE	87.0	-4.1%	160.3	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	196.0	165.0	18.0	2,543	421.06
ISLAMIBANK	31.4	31.4	2.0	13,329	418.52
BRACBANK	32.4	32.3	22.0	4,034	130.30
EMERALDOIL	142.1	142.1	2.0	710	100.89
BSRMLTD	90.0	90.0	1.0	554	49.85
CRYSTALINS	123.0	103.6	7.0	295	35.15
REPUBLIC	51.6	49.0	4.0	665	33.04
BEACONPHAR	227.0	223.6	8.0	129	28.81
SALVOCHEM	61.8	61.8	6.0	443	27.38
CNATEX	9.5	9.2	20.0	2,609	24.12

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	196.0	165.0	421.1	2,543	18
ISLAMIBANK	31.4	31.4	418.5	13,329	2
BRACBANK	32.4	32.3	130.3	4,034	22
EMERALDOIL	142.1	142.1	100.9	710	2
BSRMLTD	90.0	90.0	49.9	554	1
CRYSTALINS	123.0	103.6	35.1	295	7
REPUBLIC	51.6	49.0	33.0	665	4
BEACONPHAR	227.0	223.6	28.8	129	8
SALVOCHEM	61.8	61.8	27.4	443	6
CNATEX	9.5	9.2	24.1	2,609	20
SONALIPAPR	678.0	661.0	15.9	24	2
GEMINISEA	829.0	800.0	15.6	19	9
PRIMEINSUR	81.8	74.6	13.5	167	4
RENATA	1,142.0	1,141.8	12.6	11	3
STANDARINS	54.5	54.5	11.5	211	1
ISNLTD	43.2	43.2	9.9	229	1
IBNSINA	265.0	261.6	9.7	37	13
CONTININS	51.0	46.0	7.5	150	2
APEXFOOT	301.8	281.5	7.0	24	3
HRTEX	115.9	104.5	6.6	60	7
FAREASTLIF	70.0	67.5	5.7	84	8
EIL	37.0	36.0	4.3	117	2
Total			1,457.2		215

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
UNIQUEHRL		0.0%	20%	Record Date	23-Oct-23

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