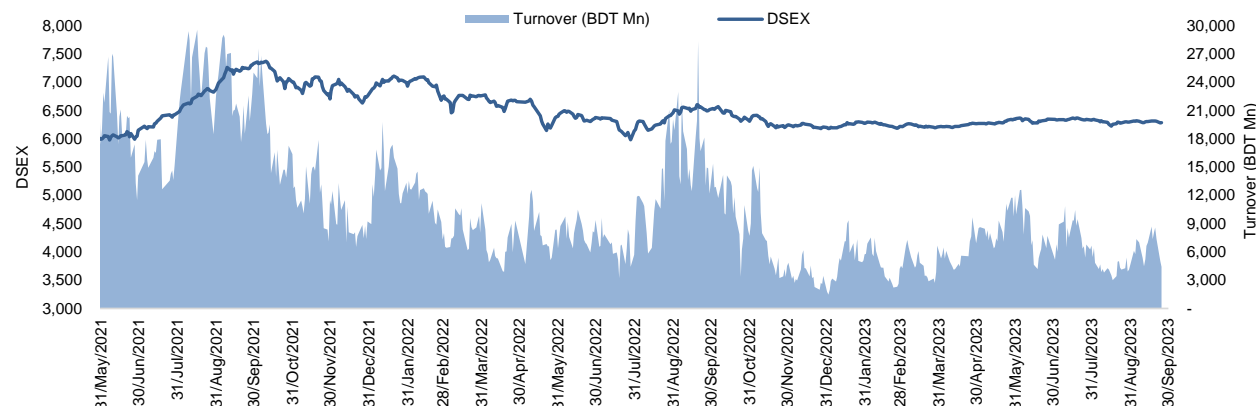


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 1.84 points and closed at 6,282.78. The blue-chip index DS30 (-0.07%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (-0.02%) closed at 2,135.31, 1,359.32, and 1,207.70 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.12% followed by Engineering (+0.03%), NBF1 (0.00%). Fuel & Power experienced the highest loss of 0.02% followed by Pharmaceutical (-0.02%), Bank (-0.01%). Block trades contributed 11.3% of the overall market turnover. Union Insurance Company Limited (-1.5%) was the most traded share with a turnover of BDT 287 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,282.78	6,280.93	+1.84	+0.03%	+1.2%
DS30	2,135.31	2,136.85	-1.55	-0.07%	-2.7%
DSES	1,359.32	1,358.68	+0.64	+0.05%	+0.0%
CDSET	1,207.70	1,207.91	-0.21	-0.02%	-0.6%

	Advanced	Declined	Unchanged	Total
All Category	82	62	156	300
A Category (Equity)	46	43	102	191
B Category (Equity)	29	15	44	88
N Category (Equity)	1	2	0	3
Z Category (Equity)	6	2	10	18
Mutual Funds	0	0	14	14
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,775,972	7,776,261	-0.0%
	Mn USD	70,691	70,693	-0.0%
Turnover	Mn BDT	4,413	5,007	-11.9%
	Mn USD	40	46	-11.9%
Volume	Mn Shares	84	98	-14.0%
				-14.9%
No. of Trade		118,972	139,751	-14.9%

\* Average Interbank Exchange Rate is BDT 110.00 as of Sep 25, 2023

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Figure: Sectorial Turnover (BDT Mn)

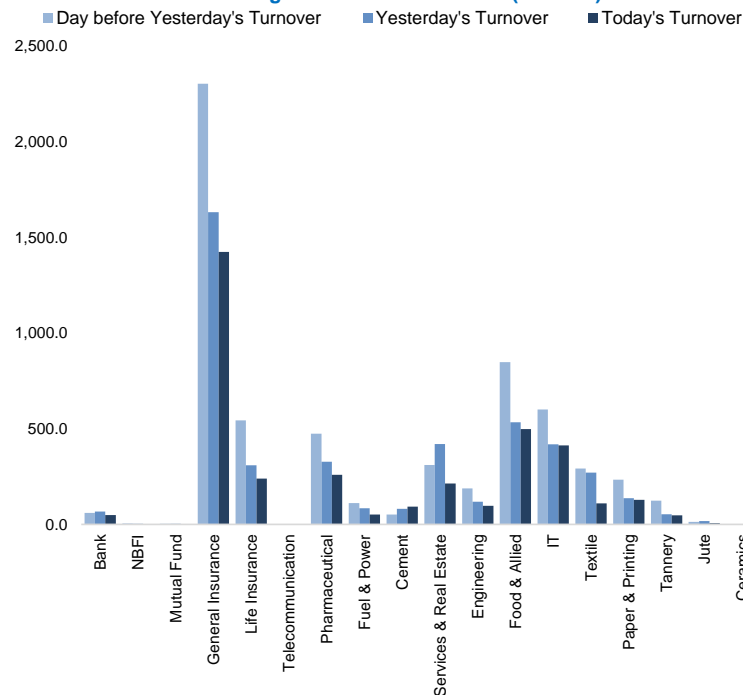
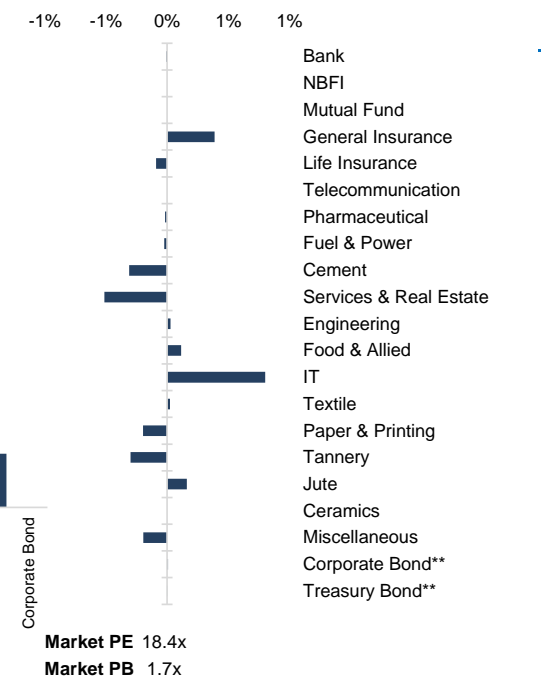


Figure: Sectorial Mcap Change



Market PE 18.4x

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	1,442	1,442	-0.10	-0.01%	35	680,452	8.8%	48.7	1.2%	12.0x	0.7x	GP	386,996	8.5%	0.0	11.9x	7.3x
NBFI	1,917	1,917	-	-	23	186,520	2.4%	1.7	0.0%	NM	6.9x	WALTONHIL	317,378	7.0%	0.0	40.5x	3.0x
Mutual Fund	827	827	-	-	36	37,403	0.5%	1.2	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.4x	6.2x
General Insurance	3,920	3,905	+15.14	+0.39%	42	114,346	1.5%	1,423.6	36.4%	21.2x	1.8x	SQURPHARMA	186,066	4.1%	61.2	9.9x	1.7x
Life Insurance	2,679	2,682	-2.41	-0.09%	15	74,884	1.0%	239.3	6.1%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	0.0	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,705	3,705	-0.65	-0.02%	34	718,615	9.3%	258.9	6.6%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,697	1,698	-0.40	-0.02%	23	447,672	5.8%	51.6	1.3%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,540	2,548	-7.88	-0.31%	7	121,994	1.6%	93.4	2.4%	26.9x	2.6x	BERGERPBL	84,408	1.9%	8.7	27.6x	6.1x
Services & Real Esta	1,864	1,874	-9.58	-0.51%	8	73,659	1.0%	213.8	5.5%	22.9x	1.2x	LHBL	80,135	1.8%	72.8	13.6x	4.0x
Engineering	4,481	4,480	+1.25	+0.03%	42	526,321	6.8%	97.7	2.5%	58.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,473	21,448	+24.83	+0.12%	21	397,331	5.1%	497.5	12.7%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,167	3,142	+25.18	+0.80%	11	41,286	0.5%	412.4	10.5%	29.1x	3.0x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,611	1,611	+0.38	+0.02%	58	168,646	2.2%	109.8	2.8%	78.6x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,413	10,434	-20.62	-0.20%	6	40,122	0.5%	127.9	3.3%	38.7x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,161	3,170	-9.48	-0.30%	6	33,382	0.4%	47.7	1.2%	45.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	15,581	15,556	+25.22	+0.16%	3	3,812	0.0%	6.2	0.2%	NM	-1323.2x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	0.0	0.0%	53.4x	1.9x	UNILEVERCL	38,926	0.9%	0.3	45.0x	22.1x
Miscellaneous	4,172	4,180	-8.11	-0.19%	14	227,175	2.9%	280.5	7.2%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.01%	10	35,137	0.5%	1.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	241	3,191,112	41.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	26.7	+9.0%	153.6	NM	2.2x
AMBEEPHA	725.6	+7.5%	40.6	NM	38.1x
OIMEX	20.5	+6.2%	7.7	NM	1.9x
KARNAPHULI	42.1	+5.3%	109.5	23.8x	1.9x
KPPL	10.1	+5.2%	8.8	NM	NM
STANDARINS	50.0	+4.8%	25.5	21.0x	2.3x
BGIC	57.0	+4.8%	5.5	36.8x	3x
CONTININS	47.3	+4.6%	57.8	78.8x	2.2x
DAFODILCOM	96.5	+4.6%	40.7	NM	7.1x
PROVATIINS	62.1	+4.5%	108.6	32.6x	2.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LEGACYFOOT	77.7	-4.3%	28.9	NM	8.7x
TILIL	61.2	-3.5%	42.7	NM	NM
MIRACLEIND	44.7	-3.0%	73.3	NM	1.4x
PARAMOUNT	72.1	-2.4%	64.0	48.4x	2.7x
APEXSPINN	123.2	-2.3%	1.1	35.5x	2.0x
PRAGATILIF	110.2	-2.0%	11.7	NM	NM
PIONEERINS	75.2	-2.0%	18.9	13.7x	1.6x
INTRACO	36.2	-1.9%	29.9	24.1x	2.8x
GQBALLPEN	109.2	-1.8%	2.1	NM	0.9x
RELIANCINS	78.0	-1.8%	9.2	15.2x	1.2x

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	4.0x
PUBALIBANK	19,162	1.1%	4.4x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	18.3x	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%	26.4x	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
UNIONINS	74.1	-1.5%	286.7	30.1x	4.1x
BDCOM	41.4	+3.8%	204.2	28.7x	2.6x
FUWANGFOOT	31.3	+4.0%	181.5	NM	7.9x
KBPPWBIL	26.7	+9.0%	153.6	NM	2.2x
GEMINISEA	817.1	+0.2%	148.7	39.0x	32.2x
CRYSTALINS	120.0	-1.6%	113.3	36.9x	4.8x
KARNAPHULI	42.1	+5.3%	109.5	23.8x	1.9x
PROVATIINS	62.1	+4.5%	108.6	32.6x	2.9x
SONALIPAPR	652.7	-0.2%	82.3	69.8x	3.8x
EHL	97.9	-0.7%	82.0	13.3x	1.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EMERALDOIL	143.5	130.0	5.0	833	117.94
SEAPEARL	201.0	166.8	9.0	677	114.78
BSRMLTD	90.0	90.0	1.0	554	49.85
BEACONPHAR	266.3	266.3	1.0	80	21.33
SILVAPHL	19.5	19.5	2.0	986	19.22
BSRMSTEEL	63.9	63.9	3.0	250	15.98
GP	261.6	261.6	4.0	54	14.09
BRACBANK	32.5	32.3	6.0	382	12.40
LRBDL	34.0	31.6	2.0	321	10.19
CNATEX	11.2	9.3	4.0	884	9.79

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EMERALDOIL	143.5	130.0	117.9	833	5
SEAPPEARL	201.0	166.8	114.8	677	9
BSRMLTD	90.0	90.0	49.9	554	1
BEACONPHAR	266.3	266.3	21.3	80	1
SILVAPHL	19.5	19.5	19.2	986	2
BSRMSTEEL	63.9	63.9	16.0	250	3
GP	261.6	261.6	14.1	54	4
BRACBANK	32.5	32.3	12.4	382	6
LRBDL	34.0	31.6	10.2	321	2
CNATEX	11.2	9.3	9.8	884	4
SALVOCHEM	62.2	61.8	9.2	147	4
MERCANBANK	13.3	12.0	7.0	527	2
UNIQUEHRL	69.0	69.0	6.9	100	2
AOL	32.9	32.9	5.8	177	5
SIMTEX	24.5	23.9	5.8	237	2
SAIFPOWER	26.8	26.8	5.4	200	3
FORTUNE	81.1	68.2	5.1	66	3
WALTONHIL	982.3	982.3	4.8	5	1
BBSCABLES	47.9	45.0	4.7	103	2
GOLDENSON	16.4	16.4	3.3	200	1
CRYSTALINS	132.0	125.0	3.2	25	4
GEMINISEA	812.0	782.0	3.2	4	3
<b>Total</b>			<b>499.6</b>		<b>130</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

#### Important DSE News

##### EMERALDOIL

The company has informed that the Board of Directors of the company has signed an agreement with Jamuna Edible Oil Industries Ltd. to operate the production and market/export its finished Rice Bran Oil and Crude oil in local market and Japan market.

##### NRBCBANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'NRBC Bank PLC.' instead of 'NRB Commercial Bank Limited' with effect from September 26, 2023. Other things (except name) will remain unchanged.

##### EPGL

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Energypac Power Generation PLC.' instead of 'Energypac Power Generation Limited' with effect from September 26, 2023. Other things (except name) will remain unchanged.

##### MPETROLEUM

The Company has informed that the Board of Directors of the Company has approved the nomination of Md Nurul Alam, Secretary of Energy and Mineral Resources Division as the new Chairman of the Company.

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