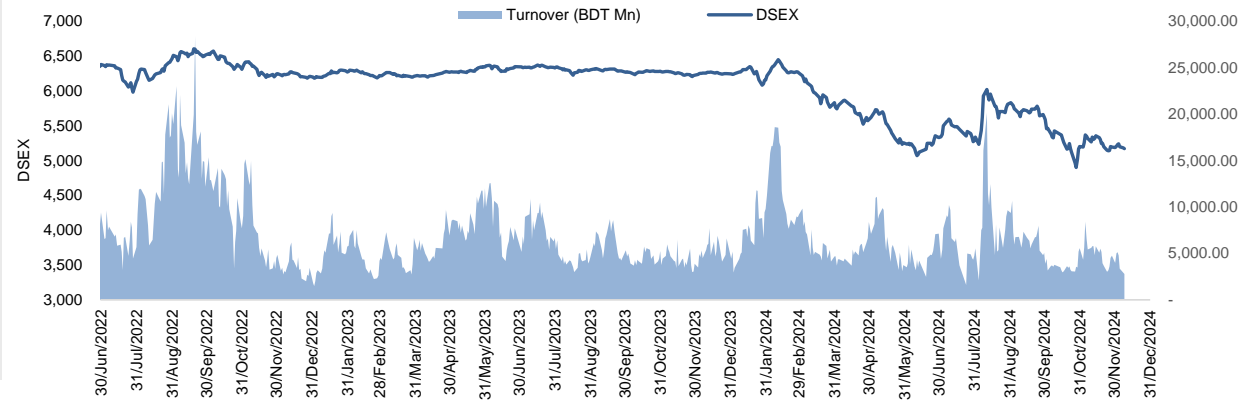


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.29%) lost 14.85 points and closed at 5,166.98. The blue-chip index DS30 (-0.24%), the Shariah-based index DSES (-0.23%), and the large-cap index CDSET (-0.30%) closed at 1,904.05, 1,154.12, and 1,053.68 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.50% followed by Bank (-0.41%), Pharmaceutical (-0.21%), Fuel & Power (-0.19%), NBF (I) (-0.16%), Engineering (-0.06%), and Telecommunication (+0.18%), respectively. Block trades contributed 3.4% of the overall market turnover. Dragon Sweater and Spinning Limited (+7.0%) was the most traded share with a turnover of BDT 115 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,166.98	5,181.83	-14.85	-0.29%	-17.3%
DS30	1,904.05	1,908.63	-4.58	-0.24%	-9.1%
DSES	1,154.12	1,156.78	-2.66	-0.23%	-15.4%
CDSET	1,053.68	1,056.84	-3.16	-0.30%	-12.4%

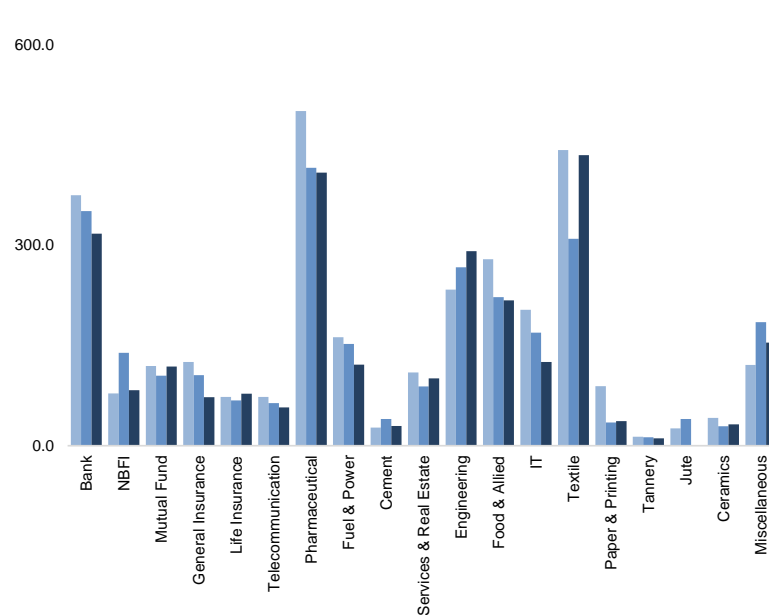
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	126	181	88	395
<b>A Category (Equity)</b>	62	120	46	228
<b>B Category (Equity)</b>	29	38	13	80
<b>N Category (Equity)</b>	3	1	0	4
<b>Z Category (Equity)</b>	32	22	29	83
<b>Mutual Funds</b>	5	14	18	37
<b>Corporate Bonds</b>	0	2	1	3
<b>Treasury Bonds</b>	0	2	0	2

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	7,194,867	6,625,176	+8.6%
Mn USD	59,957	55,210	
<b>Turnover</b>			
Mn BDT	2,787	2,934	-5.0%
Mn USD	23	24	
<b>Volume</b>			
Mn Shares	127	118	+8.2%
<b>No. of Trade</b>	109,069	110,343	-1.2%

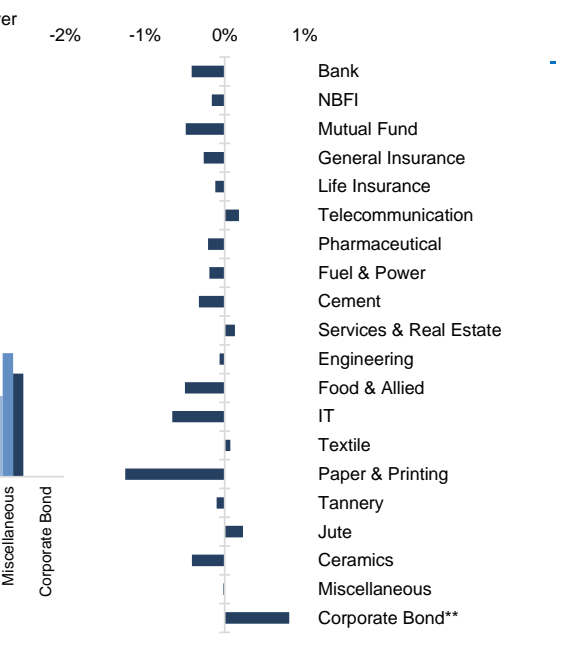
\* Based on Traded Scrips

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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



**Market PE** 14.7x  
**Market PB** 1.2x

\* 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	1,426	1,432	-5.92	-0.41%	36	674,921	9.4%	316.8	11.8%	8.7x	0.7x	GP	429,260	12.0%	24.4	12.1x	7.4x
NBFI	1,299	1,302	-2.09	-0.16%	23	123,826	1.7%	82.8	3.1%	NM	NM	SQURPHARMA	192,094	5.4%	35.2	9.1x	1.4x
Mutual Fund	609	612	-3.00	-0.49%	37	27,997	0.4%	118.5	4.4%	NM	0.5x	BATBC	188,514	5.3%	18.6	10.7x	3.1x
General Insurance	2,736	2,743	-7.18	-0.26%	43	78,106	1.1%	72.7	2.7%	14.1x	1.2x	WALTONHIL	146,829	4.1%	1.9	11.3x	1.3x
Life Insurance	1,879	1,881	-2.24	-0.12%	15	49,971	0.7%	77.8	2.9%	NM	NM	ROBI	139,329	3.9%	29.5	25.3x	2.1x
Telecommunication	5,032	5,023	+8.99	+0.18%	3	590,005	8.2%	57.2	2.1%	13.9x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,925	2,931	-6.09	-0.21%	34	554,513	7.7%	408.4	15.2%	14.1x	1.5x	BRACBANK	84,769	2.4%	24.1	7.7x	1.1x
Fuel & Power	1,136	1,138	-2.17	-0.19%	23	300,665	4.2%	121.3	4.5%	14.3x	0.6x	BERGERPBL	82,015	2.3%	0.0	24.6x	5.2x
Cement	1,978	1,984	-6.45	-0.32%	7	94,250	1.3%	29.5	1.1%	15.8x	2.0x	ISLAMIBANK	78,568	2.2%	32.7	16.8x	1.1x
Services & Real Estate	1,046	1,045	+1.33	+0.13%	9	57,519	0.8%	100.7	3.7%	19.2x	0.4x	UPGDCL	74,201	2.1%	1.4	7.1x	1.9x
Engineering	2,494	2,496	-1.61	-0.06%	42	281,341	3.9%	290.9	10.8%	12.3x	0.9x	MARICO	71,707	2.0%	2.1	13.5x	9.4x
Food & Allied	16,620	16,703	-82.97	-0.50%	21	304,094	4.2%	217.5	8.1%	16.3x	4.3x	LHB	62,133	1.7%	6.0	15.4x	3.1x
IT	2,026	2,039	-13.42	-0.66%	11	26,721	0.4%	125.2	4.7%	19.7x	1.7x	ICB	61,662	1.7%	27.2	31.7x	1.4x
Textile	1,098	1,097	+0.76	+0.07%	58	113,936	1.6%	434.3	16.1%	71.9x	0.8x	UNILEVERCL	49,157	1.4%	0.9	66.9x	20.9x
Paper & Printing	4,195	4,248	-52.96	-1.25%	6	18,950	0.3%	36.8	1.4%	NM	0.8x	DUTCHBANGL	42,711	1.2%	1.8	6.8x	0.9x
Tannery	1,969	1,971	-2.00	-0.10%	6	21,935	0.3%	11.0	0.4%	67.1x	1.5x	POWERGRID	37,923	1.1%	3.9	NM	0.2x
Jute	14,714	14,681	+33.59	+0.23%	3	3,239	0.0%	0.5	0.0%	NM	NM	BXPHARMA	37,250	1.0%	33.6	6.2x	0.8x
Ceramics	369	370	-1.52	-0.41%	5	16,533	0.2%	32.1	1.2%	NM	1.0x	PUBALIBANK	32,276	0.9%	2.5	3.4x	0.6x
Miscellaneous	4,189	4,189	-0.64	-0.02%	15	227,465	3.2%	154.0	5.7%	41.1x	1.8x	EBL	31,373	0.9%	3.5	4.8x	0.7x
Corporate Bond**	12,866	12,762	+103.28	+0.81%	16	34,871	0.5%	0.4	0.0%	NM	NM	OLYMPIC	31,330	0.9%	4.0	17.1x	2.8x
Treasury Bond**	613	515	+98.61	+19.16%	235	3,593,142	49.9%	2.7	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SALVOCHEM	26.6	+9.5%	41.6	25.3x	1.6x
AOL	14.1	+9.3%	3.1	9.0x	0.7x
MIRACLEIND	27.1	+9.3%	35.0	NM	2.1x
ATLASBANG	55.0	+8.3%	0.1	NM	0.5x
HRTEX	34.3	+7.9%	14.3	NM	1.0x
MITHUNKNIT	14.2	+7.58%	0.6	NM	4.5x
LRBDL	12.8	+7.6%	11.9	NM	0x
DSSL	12.3	+7.0%	115.4	39.7x	0.7x
CNATEX	5.5	+5.8%	21.0	NM	NM
BENGALWTL	19.2	+5.5%	14.5	34.9x	0.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.7x	3.1x
RENATA	35,002	2.6%	23.0x	2.1x
ISLAMIBANK	33,649	2.5%	16.8x	1.1x
BXPHARMA	32,479	2.4%	6.2x	0.8x
BRACBANK	32,157	2.4%	7.7x	1.1x
GP	30,004	2.2%	12.1x	7.4x
LHB	24,690	1.8%	15.4x	3.1x
EBL	24,199	1.8%	4.8x	0.7x
PUBALIBANK	20,448	1.5%	3.4x	0.6x
NBL	16,930	1.2%	NM	3.0x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.5x	0.5x
ALARABANK	13,534	1.0%	12.5x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.1x	2.8x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	44.8x	0.4x
ROBI	10,738	0.8%	25.3x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DSSL	12.3	+7.0%	115.4	39.7x	0.7x
NRBBANK	13.3	-	89.8	21.9x	1.0x
ASIATICLAB	34.9	+1.7%	64.3	14.8x	0.7x
ORIONINFU	305.8	-1.6%	49.4	NM	19.1x
GENEXIL	30.7	-2.8%	48.3	12.3x	1.4x
1STPRIMFMF	38.4	-4.5%	45.5	NM	3.6x
SAIFPOWER	13.9	+3.7%	42.3	19.9x	0.8x
FINEFOODS	216.1	+2.1%	41.9	NM	18.1x
SALVOCHEM	26.6	+9.5%	41.6	25.3x	1.6x
BSC	86.7	+0.6%	41.0	4.6x	0.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	24.4	-8.6%	24.0	18.8x	NM
TAKAFULINS	33.5	-8.0%	0.3	22.6x	2x
TAMJTEX	116.4	-4.9%	2.7	17.3x	1.2x
1STPRIMFMF	38.4	-4.5%	45.5	NM	3.6x
BIFC	8.8	-4.3%	0.2	NM	NM
ZAHINTEX	5.2	-3.7%	0.2	NM	0.7x
ICBEPMF1S1	5.3	-3.6%	0.0	NM	1.0x
VAMLBDMF1	5.3	-3.6%	0.0	NM	0.5x
CAPMBDBLMF	5.8	-3.3%	0.6	NM	0.7x
UCB	9.2	-3.2%	8.0	4.1x	0.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MTB	12.1	12.1	2.0	5,000	60.50
RELIANCE1	19.2	19.0	7.0	810	15.40
BRACBANK	49.7	49.7	1.0	65	3.23
PROVATIINS	36.5	36.5	1.0	48	1.74
RENATA	686.7	686.7	1.0	2	1.37
DBH1STMF	4.4	4.4	1.0	300	1.32
EIL	51.0	51.0	1.0	25	1.28
MIDLANDBNK	34.1	34.1	2.0	31	1.07
FINEFOODS	193.5	193.5	1.0	5	0.99
SUNLIFEINS	57.2	57.2	1.0	17	0.97

\* 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

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MTB	12.1	12.1	60.5	5,000	2
RELIANCE1	19.2	19.0	15.4	810	7
BRACBANK	49.7	49.7	3.2	65	1
PROVATIINS	36.5	36.5	1.7	48	1
RENATA	686.7	686.7	1.4	2	1
DBH1STMF	4.4	4.4	1.3	300	1
EIL	51.0	51.0	1.3	25	1
MIDLANDBNK	34.1	34.1	1.1	31	2
FINEFOODS	193.5	193.5	1.0	5	1
SUNLIFEINS	57.2	57.2	1.0	17	1
NLTUBES	79.8	79.8	1.0	12	1
MONOSPOOL	129.0	129.0	0.9	7	1
DSSL	11.7	11.7	0.8	65	1
PADMAOIL	207.6	207.6	0.8	4	1
BSC	93.8	93.8	0.7	8	1
BENGALWTL	18.4	18.4	0.7	37	1
ARGONDENIM	17.6	17.6	0.5	30	1
ARGONDENIM	17.6	17.6	0.5	30	1
PREMIERCEM	51.2	51.2	0.5	10	1
CONFIDCEM	60.6	60.6	0.5	8	1
MONNOAGML	430.0	430.0	0.5	1	1
RUPALILIFE	98.1	98.1	0.5	5	1
<b>Total</b>			<b>95.7</b>		<b>30</b>

**Important DSE News**

**TAMIJTEX**

**(Q1 Un-audited):** EPS was Tk. 0.88 for July-September 2024 as against Tk. 0.86 for July-September 2023; NOCFPS was Tk. 3.57 for July-September 2024 as against Tk. 0.02 for July-September 2023. NAV per share was Tk. 97.70 as on September 30, 2024 and Tk. 96.79 as on June 30, 2024. Reasons for deviation: NOCFPS has been increased as collection from clients increased compared to the same period of previous year.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GHCL		0.0%	0%	Record Date	12-Dec-24
SKTRIMS		0.0%	2%	Record Date	12-Dec-24
GSPFINANCE		0.0%	0%	Record Date	12-Dec-24
MPETROLEUM		0.0%	170%	Record Date	15-Dec-24
EPGL		0.0%	0%	Record Date	15-Dec-24
SAMATALETH		0.0%	0%	Record Date	15-Dec-24
BDTHAI		0.0%	0%	Record Date	15-Dec-24
BEACHHATCH		0.0%	10%	Record Date	15-Dec-24
GOLDENSON		0.0%	2%	Record Date	15-Dec-24
ECABLES		0.0%	2%	Record Date	17-Dec-24
AGNISYSL		0.0%	5%	Record Date	17-Dec-24
RINGSHINE		0.0%	0%	Record Date	18-Dec-24
DSSL		0.0%	1%	Record Date	19-Dec-24
PHARMAID		0.0%	25%	Record Date	24-Dec-24
JAMUNAOIL		0.0%	150%	Record Date	24-Dec-24

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