

Daily Market Update

The market closed in red today. The benchmark index DSEX (-2.37%) lost 132.29 points and closed at 5,453.99. The blue-chip index DS30 (-2.52%), the Shariah-based index DSES (-2.60%), and the large-cap index CDSET (-2.11%) closed at 1,988.02, 1,219.71, and 1,118.09 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 2.91% followed by Fuel & Power (-2.84%), Engineering (-2.73%), Telecommunication (-2.66%), NBFi (-2.63%), Pharmaceutical (-1.92%), and Bank (-1.34%), respectively. Block trades contributed 3.2% of the overall market turnover. Grameenphone Ltd. (-2.1%) was the most traded share with a turnover of BDT 208 million.

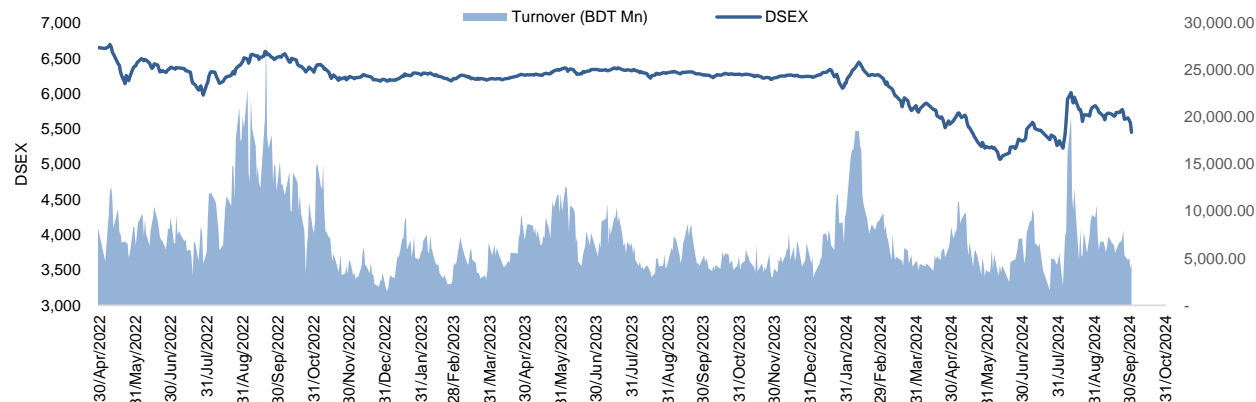


Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change

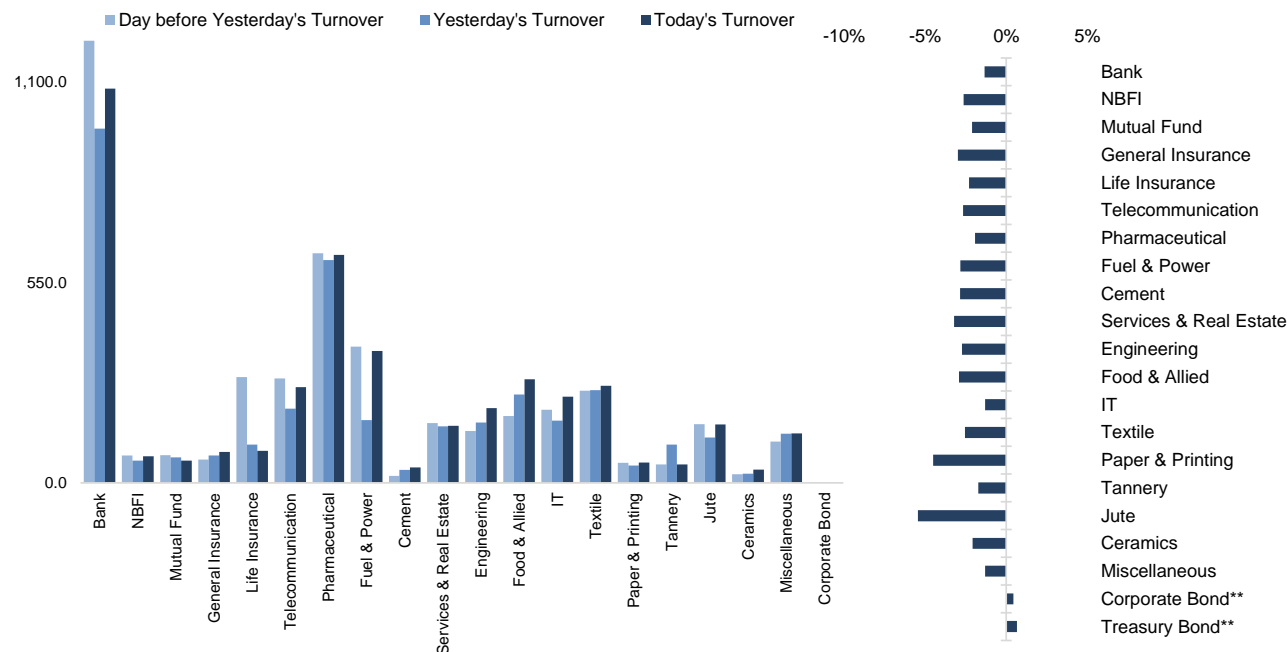
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,453.99	5,586.29	-132.29	-2.37%	-12.7%
DS30	1,988.02	2,039.35	-51.33	-2.52%	-5.1%
DSES	1,219.71	1,252.22	-32.52	-2.60%	-10.6%
CDSET	1,118.09	1,142.17	-24.08	-2.11%	-7.0%

	Advanced	Declined	Unchanged	Total
All Category	29	347	22	398
A Category (Equity)	17	202	14	233
B Category (Equity)	5	73	2	80
N Category (Equity)	0	4	0	4
Z Category (Equity)	7	68	6	81
Mutual Funds	1	28	8	37
Corporate Bonds	1	2	0	3
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,720,489	6,801,244	-1.2%
	Mn USD	56,004	56,677	
Turnover	Mn BDT	4,408	3,895	+13.2%
	Mn USD	37	32	
Volume	Mn Shares	167	145	+15.3%
No. of Trade		142,591	131,159	+8.7%

* Average Interbank Exchange Rate is BDT 120.00 as of Oct 02, 2024



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Market PE 14.9x
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	1,550	1,571	-21.01	-1.34%	36	742,611	11.0%	1,081.5	25.3%	8.1x	0.7x	GP	460,587	12.2%	207.7	13.0x	6.4x
NBFI	1,186	1,218	-31.97	-2.63%	23	114,799	1.7%	72.8	1.7%	NM	NM	BATBC	205,794	5.5%	72.0	11.7x	3.6x
Mutual Fund	595	608	-12.83	-2.11%	37	27,809	0.4%	60.8	1.4%	NM	0.5x	SQRPHARMA	203,263	5.4%	53.6	10.0x	1.7x
General Insurance	2,695	2,777	-82.57	-2.97%	43	78,056	1.2%	84.9	2.0%	14.2x	1.2x	WALTONHIL	167,580	4.4%	9.7	12.4x	1.5x
Life Insurance	2,133	2,183	-49.91	-2.29%	15	56,712	0.8%	87.5	2.1%	NM	NM	ROBI	137,758	3.7%	45.6	29.6x	2.2x
Telecommunication	5,361	5,507	-146.43	-2.66%	3	620,723	9.2%	262.5	6.2%	14.8x	4.1x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	2,993	3,051	-58.50	-1.92%	34	567,794	8.4%	624.8	14.6%	14.6x	1.6x	ISLAMIBANK	100,141	2.7%	154.2	15.4x	1.4x
Fuel & Power	1,150	1,183	-33.56	-2.84%	23	302,720	4.5%	361.8	8.5%	19.9x	0.7x	BRACBANK	95,918	2.5%	168.7	9.8x	1.4x
Cement	2,235	2,300	-65.47	-2.85%	7	106,736	1.6%	42.5	1.0%	17.3x	2.3x	BERGERPBL	81,987	2.2%	1.5	25.4x	5.4x
Services & Real Estate	1,132	1,170	-37.68	-3.22%	9	62,581	0.9%	156.7	3.7%	19.7x	0.4x	RENATA	79,886	2.1%	8.7	22.1x	2.4x
Engineering	2,664	2,739	-74.87	-2.73%	42	307,804	4.6%	204.7	4.8%	12.7x	0.9x	MARICO	71,713	1.9%	6.6	14.3x	7.2x
Food & Allied	17,720	18,251	-531.75	-2.91%	21	325,325	4.8%	283.9	6.7%	17.1x	5.1x	LHBL	68,753	1.8%	17.5	14.4x	3.6x
IT	2,301	2,332	-30.44	-1.31%	11	30,276	0.4%	236.6	5.5%	25.0x	2.0x	ICB	51,949	1.4%	1.8	NM	1.2x
Textile	1,123	1,152	-29.36	-2.55%	58	116,476	1.7%	266.5	6.2%	NM	0.8x	UNILEVERCL	51,929	1.4%	0.5	58.5x	23.7x
Paper & Printing	4,672	4,893	-220.64	-4.51%	6	21,435	0.3%	55.6	1.3%	33.4x	0.9x	DUTCHBANGL	46,402	1.2%	4.8	6.1x	1.0x
Tannery	2,094	2,131	-36.52	-1.71%	6	22,939	0.3%	50.7	1.2%	37.7x	1.6x	POWERGRID	35,182	0.9%	2.4	NM	0.2x
Jute	16,763	17,729	-965.78	-5.45%	3	3,928	0.1%	160.4	3.8%	NM	NM	EBL	34,361	0.9%	9.9	4.9x	0.8x
Ceramics	375	383	-7.95	-2.08%	5	16,640	0.2%	36.6	0.9%	44.4x	1.0x	OLYMPIC	33,510	0.9%	42.2	20.0x	3.2x
Miscellaneous	4,125	4,179	-54.08	-1.29%	15	224,749	3.3%	135.7	3.2%	38.0x	1.7x	CITYBANK	29,636	0.8%	37.6	4.5x	0.8x
Corporate Bond**	8,736	8,698	+37.92	+0.44%	16	35,642	0.5%	0.8	0.0%	NM	NM	PUBALIBANK	29,499	0.8%	5.2	3.5x	0.6x
Treasury Bond**	391	389	+2.57	+0.66%	237	2,961,221	43.9%	0.1	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DSHGARME	77.3	+10.0%	0.5	NM	4.2x	SQRPHARMA	117,112	8.6%	10.0x	1.7x	GP	341.1	-2.1%	207.7	13.0x	6.4x
FEDERALINS	20.6	+7.9%	2.4	24.2x	1.5x	BEXIMCO	69,460	5.1%	NM	1.2x	LINDEBD	1,030.1	-6.2%	179.4	27.3x	2.5x
AFTABAUTO	33.4	+6.0%	68.2	NM	0.7x	BATBC	45,948	3.4%	11.7x	3.6x	BRACBANK	54.2	-1.6%	168.7	9.8x	1.4x
BIFC	9.1	+5.8%	2.1	NM	NM	RENATA	35,002	2.6%	22.1x	2.4x	SONALIANS	304.2	-6.0%	160.1	35.4x	4.5x
SHEPHERD	14.6	+5.8%	3.1	NM	1.1x	ISLAMIBANK	33,649	2.5%	15.4x	1.4x	ISLAMIBANK	62.2	-4.2%	154.2	15.4x	1.4x
SIBL	12.5	+5.0%	145.7	6.5x	0.6x	BXPHARMA	32,479	2.4%	5.5x	0.6x	SIBL	12.5	+5.0%	145.7	6.5x	0.6x
LIBRAINFU	899.5	+4.7%	44.7	NM	1x	BRACBANK	32,157	2.4%	9.8x	1.4x	FIRSTSBANK	8.3	+3.8%	122.6	3.4x	0.4x
MEGHNACEM	68.7	+4.4%	0.4	NM	1.5x	GP	30,004	2.2%	13.0x	6.4x	MJLBD	89.4	-7.9%	97.7	9.1x	1.9x
FIRSTSBANK	8.3	+3.8%	122.6	3.4x	0.4x	LHBL	24,690	1.8%	14.4x	3.6x	ADNTEL	104.1	+3.6%	96.9	NM	3.4x
ADNTEL	104.1	+3.6%	96.9	NM	3.4x	EBL	24,199	1.8%	4.9x	0.8x	IBNSINA	346.7	-5.0%	96.7	15.7x	3.2x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.5x						
						CITYBANK	16,830	1.2%	4.5x	0.8x						
						BSRMLTD	14,210	1.0%	3.8x	0.5x						
						ALARABANK	13,534	1.0%	10.0x	1.0x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	20.0x	3.2x						
						UTTARABANK	11,350	0.8%	11.3x	0.8x						
						ORIONPHARM	11,317	0.8%	7.8x	0.4x						
						ROBI	10,738	0.8%	29.6x	2.2x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FUWANGFOOD	11.8	-9.9%	15.0	NM	4.8x						IFADAUTOS	22.1	22.1	1.0	1,729	38.21
WMSHIPYARD	6.4	-9.9%	4.2	NM	0x						BDFINANCE	16.6	16.6	2.0	2,297	38.13
GLOBALINS	23.9	-9.8%	3.9	16.7x	1.6x						ADNTEL	98.1	90.5	8.0	277	25.98
ORIONPHARM	34.1	-9.8%	60.4	7.8x	0.4x						NBL	5.5	5.5	1.0	1,500	8.25
AOL	13.3	-9.5%	5.5	8.5x	0.7x						BRACBANK	57.9	57.8	3.0	78	4.51
BSC	73.1	-9.4%	70.6	5.0x	0.8x						NCCBANK	9.8	9.8	1.0	448	4.39
ASIAPACINS	32.8	-9.1%	2.2	15.2x	1.4x						IBNSINA	370.0	355.0	4.0	12	4.26
DOMINAGE	10.0	-9.1%	3.6	NM	0.6x						AL-HAJTEX	136.0	136.0	1.0	15	2.04
SPCERAMICS	12.0	-9.1%	20.2	54.5x	0.4x						CENTRALINS	48.0	48.0	1.0	42	2.02
GSPFINANCE	7.0	-9.1%	6.6	NM	0.3x						SIBL	13.0	13.0	1.0	145	1.89

* 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
IFADAUTOS	22.1	22.1	38.2	1,729	1
BDFINANCE	16.6	16.6	38.1	2,297	2
ADNTEL	98.1	90.5	26.0	277	8
NBL	5.5	5.5	8.3	1,500	1
BRACBANK	57.9	57.8	4.5	78	3
NCCBANK	9.8	9.8	4.4	448	1
IBNSINA	370.0	355.0	4.3	12	4
AL-HAJTEX	136.0	136.0	2.0	15	1
CENTRALINS	48.0	48.0	2.0	42	1
SIBL	13.0	13.0	1.9	145	1
TOSRIFA	25.8	23.1	1.8	75	3
AGNISYSL	35.1	35.1	1.8	50	1
BXPHARMA	68.0	68.0	1.7	25	1
FEKDIL	17.6	17.6	1.6	90	2
BSRMLTD	84.7	84.7	1.4	17	2
ORIONINFU	349.9	349.9	1.2	4	1
FIRSTSBANK	7.9	7.9	0.8	100	1
FIRSTSBANK	7.9	7.9	0.8	100	1
Total			141.0		36

Important DSE News

SONALIANSH

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., October 02, 2024 as per provision 1(e) of BSEC Order No. BSEC/CMRRCD/2009-193/77, dated May 20, 2024.

DSHGARME

The Company has been placed in 'B' category from existing 'Z' category with effect from today i.e., October 02, 2024 as the Company has reported disbursement of 3% Cash Dividend for the year ended June 30, 2023.

FEDERALINS

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., October 02, 2024 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2023.

CONTININS

The Company has informed that the Board of Directors has decided to appoint Mr. Mosharraf Hossain as the Chief Executive Officer (CEO) (Current Charge) of the company with effect from October 01, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EHL		0.0%	19%	Record Date	3-Oct-24
PRIMELIFE		0.0%	1%	Record Date	9-Oct-24
UNIQUEHRL		0.0%	16%	Record Date	20-Oct-24
RENATA		0.0%	92%	Record Date	21-Oct-24
KTL		0.0%	0%	Record Date	22-Oct-24
NPOLYMER		0.0%	11%	Record Date	22-Oct-24
APEXFOOT		10.0%	35%	Record Date	22-Oct-24
MIDASFIN		0.0%	0%	Record Date	22-Oct-24
PHOENIXFIN		0.0%	0%	Record Date	24-Oct-24
BEACONPHAR		0.0%	20%	Record Date	27-Oct-24
CVOPRL		0.0%	10%	Record Date	31-Oct-24

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