

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.16%) gained 8.59 points and closed at 5,462.58. The blue-chip index DS30 (+0.14%), the Shariah-based index DSES (+0.13%), and the large-cap index CDSET (+0.07%) closed at 1,990.85, 1,221.27, and 1,118.85 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 1.02% followed by Engineering (+0.94%), Pharmaceutical (+0.47%), Fuel & Power (+0.17%), Bank (+0.06%), Food & Allied (-0.02%), and Telecommunication (-0.66%), respectively. Block trades contributed 2.6% of the overall market turnover. The IBN SINA Pharmaceutical Industry Ltd. (-5.0%) was the most traded share with a turnover of BDT 152 million.

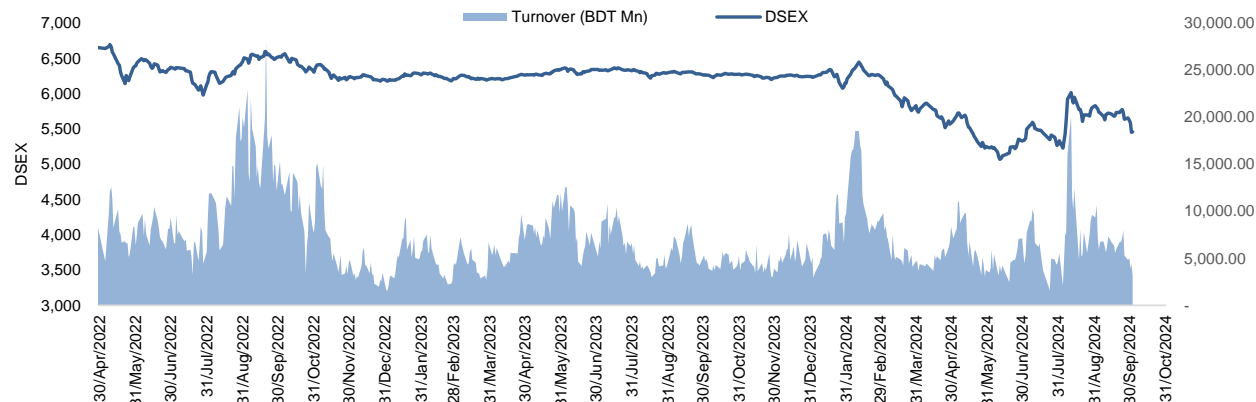


Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

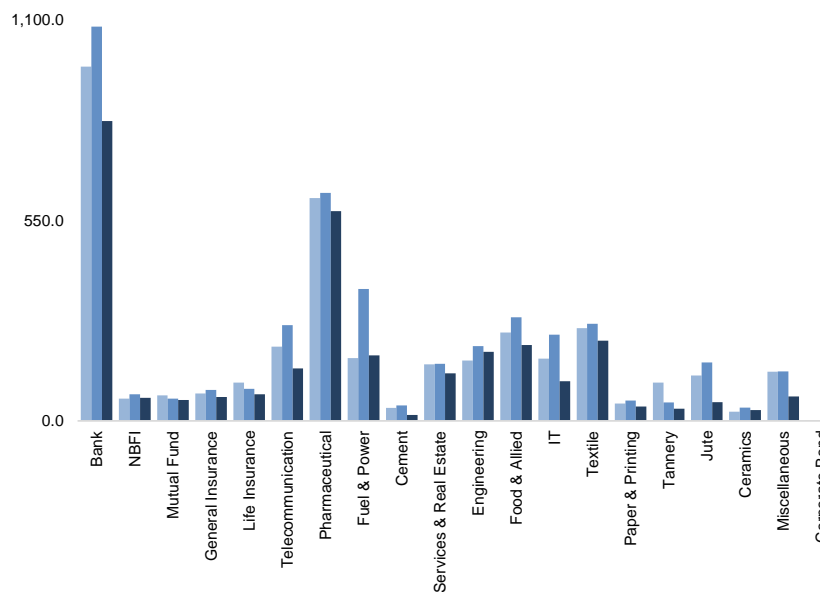
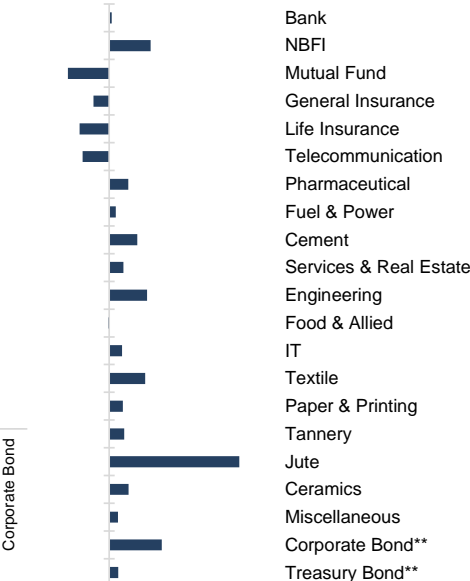


Figure: Sectorial Mcap Change

-2% 0% 2% 4%



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,462.58	5,453.99	+8.59	+0.16%	-12.5%
DS30	1,990.85	1,988.02	+2.83	+0.14%	-4.9%
DSES	1,221.27	1,219.71	+1.57	+0.13%	-10.5%
CDSET	1,118.85	1,118.09	+0.76	+0.07%	-7.0%

	Advanced	Declined	Unchanged	Total
All Category	209	138	50	397
A Category (Equity)	109	96	26	231
B Category (Equity)	56	15	9	80
N Category (Equity)	2	2	0	4
Z Category (Equity)	42	25	15	82
Mutual Funds	8	16	13	37
Corporate Bonds	1	0	1	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,721,156	6,720,489	+0.0%
	Mn USD	56,016	56,010	
Turnover	Mn BDT	3,156	4,408	-28.4%
	Mn USD	26	37	
Volume	Mn Shares	125	167	-25.0%
No. of Trade		115,559	142,591	-19.0%

* Average Interbank Exchange Rate is BDT 119.99 as of Oct 03, 2024

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Market PE 14.9x
Market PB 1.3x

* 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	1,551	1,550	+0.93	+0.06%	36	743,055	11.0%	822.0	26.8%	8.1x	0.7x	GP	456,266	12.1%	111.2	12.9x	6.4x
NBFI	1,198	1,186	+12.15	+1.02%	23	115,975	1.7%	63.1	2.1%	NM	NM	BATBC	205,848	5.5%	43.6	11.7x	3.6x
Mutual Fund	589	595	-6.05	-1.02%	37	27,526	0.4%	57.6	1.9%	NM	0.5x	SQRPHARMA	202,997	5.4%	49.3	10.0x	1.7x
General Insurance	2,684	2,695	-10.47	-0.39%	43	77,752	1.2%	65.4	2.1%	14.1x	1.2x	WALTONHIL	168,792	4.5%	16.8	12.4x	1.5x
Life Insurance	2,118	2,133	-15.54	-0.73%	15	56,299	0.8%	73.3	2.4%	NM	NM	ROBI	137,758	3.6%	25.5	29.6x	2.2x
Telecommunication	5,326	5,361	-35.18	-0.66%	3	616,649	9.1%	143.6	4.7%	14.7x	4.1x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,007	2,993	+14.19	+0.47%	34	570,486	8.5%	575.3	18.7%	14.7x	1.6x	ISLAMIBANK	99,014	2.6%	114.5	15.2x	1.3x
Fuel & Power	1,152	1,150	+1.90	+0.17%	23	303,221	4.5%	179.5	5.8%	19.9x	0.7x	BRACBANK	96,626	2.6%	93.1	9.9x	1.4x
Cement	2,250	2,235	+15.48	+0.69%	7	107,475	1.6%	16.2	0.5%	17.4x	2.4x	BERGERPBL	81,945	2.2%	0.5	25.4x	5.3x
Services & Real Estate	1,136	1,132	+3.99	+0.35%	9	62,801	0.9%	130.6	4.2%	19.8x	0.5x	RENATA	80,895	2.1%	9.0	22.4x	2.4x
Engineering	2,689	2,664	+25.00	+0.94%	42	310,692	4.6%	189.1	6.2%	12.8x	1.0x	MARICO	71,864	1.9%	2.3	14.4x	7.2x
Food & Allied	17,715	17,720	-4.29	-0.02%	21	325,246	4.8%	208.1	6.8%	17.1x	5.1x	LHBL	69,334	1.8%	5.8	14.6x	3.6x
IT	2,309	2,301	+7.29	+0.32%	11	30,371	0.5%	108.7	3.5%	25.1x	2.0x	ICB	53,250	1.4%	2.9	NM	1.3x
Textile	1,133	1,123	+10.00	+0.89%	58	117,514	1.7%	220.3	7.2%	NM	0.8x	UNILEVERCL	50,944	1.3%	0.3	57.4x	23.3x
Paper & Printing	4,688	4,672	+15.77	+0.34%	6	21,507	0.3%	39.1	1.3%	33.6x	0.9x	DUTCHBANGL	46,138	1.2%	5.3	6.0x	0.9x
Tannery	2,102	2,094	+7.78	+0.37%	6	23,025	0.3%	33.4	1.1%	37.9x	1.6x	POWERGRID	36,004	1.0%	2.0	NM	0.2x
Jute	17,302	16,763	+538.69	+3.21%	3	4,054	0.1%	51.0	1.7%	NM	NM	EBL	34,089	0.9%	24.9	4.9x	0.8x
Ceramics	377	375	+1.79	+0.48%	5	16,720	0.2%	29.3	1.0%	44.6x	1.0x	OLYMPIC	34,010	0.9%	22.6	20.3x	3.3x
Miscellaneous	4,134	4,125	+8.93	+0.22%	15	225,235	3.3%	66.9	2.2%	38.1x	1.7x	BXPHARMA	30,113	0.8%	34.7	5.6x	0.6x
Corporate Bond**	8,849	8,736	+113.25	+1.30%	16	35,783	0.5%	0.1	0.0%	NM	NM	PUBALIBANK	29,384	0.8%	0.8	3.5x	0.6x
Treasury Bond**	392	391	+0.88	+0.23%	237	2,956,226	43.8%	0.5	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
DOMINAGE	11.0	+10.0%	3.5	NM	0.6x	SQRPHARMA	117,112	8.6%	10.0x	1.7x	IBNSINA	329.4	-5.0%	151.5	15.3x	2.9x
SHYAMPSUG	124.9	+9.9%	1.7	NM	NM	BEXIMCO	69,460	5.1%	NM	1.2x	MIDLANDBNK	28.5	+4.8%	138.2	15.3x	2.0x
DSHGARME	84.3	+9.1%	5.0	NM	4.6x	BATBC	45,948	3.4%	11.7x	3.6x	ISLAMIBANK	61.5	-1.1%	114.5	15.2x	1.3x
DULAMACOT	71.5	+9.0%	0.0	NM	NM	RENATA	35,002	2.6%	22.4x	2.4x	GP	337.9	-0.9%	111.2	12.9x	6.4x
GSPFINANCE	7.6	+8.6%	2.2	NM	0.3x	ISLAMIBANK	33,649	2.5%	15.2x	1.3x	SIBL	12.2	-2.4%	97.7	6.4x	0.6x
NORTHERN	130.1	+7.3%	0.2	NM	1.6x	BXPHARMA	32,479	2.4%	5.6x	0.6x	BRACBANK	54.6	+0.7%	93.1	9.9x	1.4x
ORIONPHARM	36.6	+7.3%	60.0	8.3x	0x	BRACBANK	32,157	2.4%	9.9x	1.4x	MJLBD	87.9	-1.7%	72.9	9.0x	1.9x
UNITEDFIN	12.9	+6.6%	3.0	14.8x	0.8x	GP	30,004	2.2%	12.9x	6.4x	ORIONPHARM	36.6	+7.3%	60.0	8.3x	0.4x
RNSPIN	15.1	+6.3%	0.6	65.3x	1.4x	LHBL	24,690	1.8%	14.6x	3.6x	LOVELLO	81.1	-1.2%	58.9	58.8x	6.1x
ORIONINFU	333.9	+6.3%	43.2	NM	22.4x	EBL	24,199	1.8%	4.9x	0.8x	AFTABAUTO	34.9	+4.5%	58.6	NM	0.7x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.6x						
						CITYBANK	16,830	1.2%	4.5x	0.8x						
						BSRMLTD	14,210	1.0%	3.9x	0.5x						
						ALARABANK	13,534	1.0%	9.9x	1.0x						
						PRIMEBANK	12,985	1.0%	4.7x	0.8x						
						OLYMPIC	12,616	0.9%	20.3x	3.3x						
						UTTARABANK	11,350	0.8%	11.3x	0.8x						
						ORIONPHARM	11,317	0.8%	8.3x	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)					
NTC	258.1	-8.7%	5.3	NM	NM	ADVENT	17.0	17.0	1.0	500	8.50					
HAMI	73.1	-7.5%	3.1	NM	8x	PRAGATILIF	210.0	210.0	1.0	40	8.40					
STANCERAM	75.1	-7.4%	0.0	NM	NM	NBL	5.4	5.4	1.0	1,500	8.10					
TOSRIFA	22.0	-7.2%	14.4	36.7x	0.7x	IBNSINA	368.0	366.9	3.0	13	4.68					
FBFIF	3.4	-5.6%	5.4	NM	0.4x	BIFC	9.2	9.2	1.0	500	4.60					
LRGLOBMF1	3.5	-5.4%	3.1	NM	0.4x	NCCBANK	9.7	9.7	1.0	474	4.60					
UTTARAFIN	16.4	-5.2%	0.4	NM	0.3x	BATBC	401.0	347.8	2.0	10	3.99					
IBNSINA	329.4	-5.0%	151.5	15.3x	2.9x	SQRPHARMA	229.2	229.2	1.0	17	3.99					
SHURWID	8.0	-4.8%	0.7	NM	0.6x	ACI	152.0	152.0	1.0	21	3.19					
DBH1STMF	4.3	-4.4%	0.0	NM	0.5x	WALTONHIL	594.6	594.6	1.0	5	2.97					

* 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
ADVENT	17.0	17.0	8.5	500	1
PRAGATILIF	210.0	210.0	8.4	40	1
NBL	5.4	5.4	8.1	1,500	1
IBNSINA	368.0	366.9	4.7	13	3
BIFC	9.2	9.2	4.6	500	1
NCCBANK	9.7	9.7	4.6	474	1
BATBC	401.0	347.8	4.0	10	2
SQURPHARMA	229.2	229.2	4.0	17	1
ACI	152.0	152.0	3.2	21	1
WALTONHIL	594.6	594.6	3.0	5	1
LOVELLO	89.0	78.0	2.6	30	2
NEWLINE	22.8	22.8	2.5	111	1
ISLAMIBANK	60.8	60.4	2.4	40	2
ABBANK	9.0	9.0	2.3	250	1
BEXIMCO	104.1	104.1	2.1	20	4
RUPALILIFE	101.0	101.0	2.0	20	1
MIDLANDBNK	28.0	28.0	1.8	65	1
MIDLANDBNK	28.0	28.0	1.8	65	1
AIL	98.9	98.9	1.6	17	1
DAFODILCOM	78.0	78.0	1.6	20	1
RENATA	740.0	740.0	1.5	2	1
SIBL	12.0	12.0	1.2	100	1
Total			82.6		40

Important DSE News

IBNSINA

The Board of Directors has recommended 63% Cash Dividend for the year ended June 30, 2024. Date of AGM: 24.11.2024, Time: 9:30 AM, Venue: Digital Platform. Record Date: 27.10.2024. The Company has also reported Consolidated EPS of Tk. 21.46, Consolidated NAV per share of Tk. 111.94 and Consolidated NOCFPS of Tk. 12.48 for the year ended June 30, 2024, as against Tk. 19.38, Tk. 96.68 and Tk. 28.08 respectively for the year ended June 30, 2023.

GEMINISEA

Referring to their earlier news disseminated by DSE on 25.02.2024 regarding EGM for Issuance of Right Shares, the company has further informed that Bangladesh Securities and Exchange Commission is not in a position to accord consent to the company for raising capital of Tk. 1,28,20,93,200.00 only through issuance of Right Shares.

EASTERNINS

The company has informed that as per the decision of the Board of Directors of the company and subsequent approval of IDRA, Mr. Hasan Tarek has been appointed as Chief Executive Officer of the company with effect from October 01, 2024.

DHAKABANK

Refer to the earlier news disseminated by DSE on 02.07.2023, the company has further informed that Bangladesh Securities and Exchange Commission (BSEC) through its letter dated September 29, 2024 has communicated that the Commission is not in a position to approve the application of the Bank for issuance of Dhaka Bank 4th Subordinated Bond of BDT 4000 million.

ISLAMICFIN

Mr. S.M. Bakhtiar Alam, a Sponsor of the Company, has expressed his intention to sell 200,000 shares out of his total holding of 30,08,789 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. (DSE) within October 31, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
IBNSINA		0.0%	63%	Record Date	27-Oct-24
CVOPRL		0.0%	10%	Record Date	31-Oct-24

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