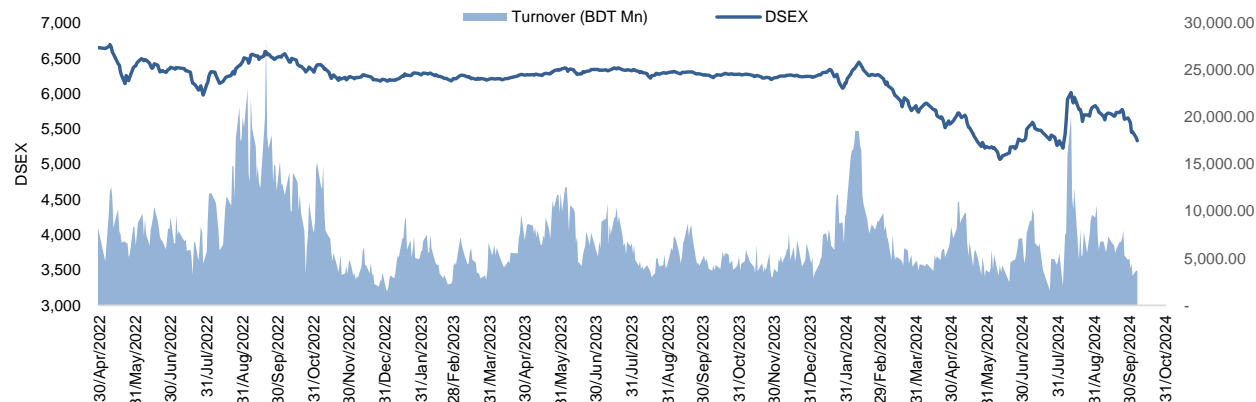


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.81%) lost 43.72 points and closed at 5,335.06. The blue-chip index DS30 (-1.12%), the Shariah-based index DSES (-0.12%), and the large-cap index CDSET (-0.41%) closed at 1,942.22, 1,189.39, and 1,091.89 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 3.58% followed by NBF1 (-2.64%), Fuel & Power (-2.09%), Telecommunication (-1.82%), Food & Allied (-1.57%), Pharmaceutical (-0.73%), and Bank (-0.25%), respectively. Block trades contributed 5.6% of the overall market turnover. Midland Bank Limited (-0.7%) was the most traded share with a turnover of BDT 369 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,335.06	5,378.78	-43.72	-0.81%	-14.6%
DS30	1,942.22	1,964.31	-22.09	-1.12%	-7.2%
DSES	1,189.39	1,190.86	-1.47	-0.12%	-12.8%
CDSET	1,091.89	1,096.38	-4.49	-0.41%	-9.2%

Figure: Sectorial Turnover (BDT Mn)

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

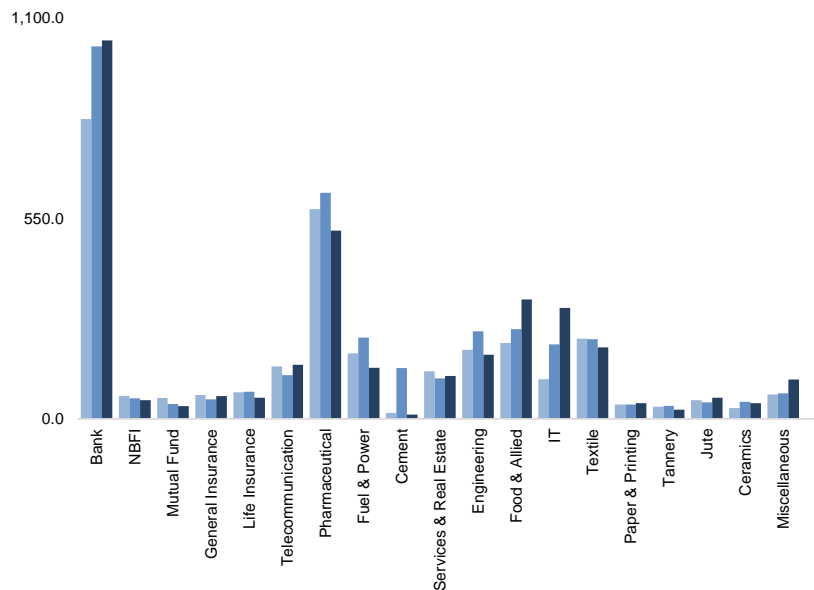
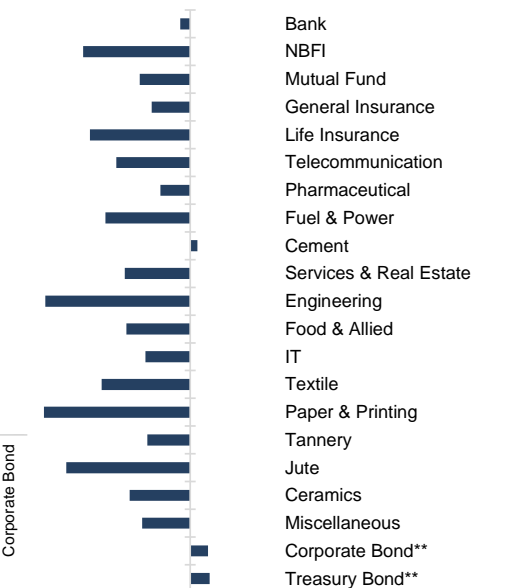


Figure: Sectorial Mcap Change

■ -4% ■ -2% ■ 0% ■ 2%



	Advanced	Declined	Unchanged	Total
All Category	53	288	55	396
A Category (Equity)	31	172	27	230
B Category (Equity)	11	59	10	80
N Category (Equity)	0	4	0	4
Z Category (Equity)	11	53	18	82
Mutual Funds	2	22	13	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,613,864	6,666,303	-0.8%
	Mn USD	55,116	55,553	
Turnover	Mn BDT	3,666	3,682	-0.4%
	Mn USD	31	31	
Volume	Mn Shares	129	142	-9.5%
	No. of Trade	119,183	129,292	-7.8%

* Average Interbank Exchange Rate is BDT 120.00 as of Oct 07, 2024

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Market PE 14.6x
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	1,514	1,518	-3.75	-0.25%	36	725,321	11.0%	1,037.7	30.0%	7.9x	0.7x	GP	439,928	11.9%	114.7	12.4x	6.1x
NBFI	1,169	1,201	-31.76	-2.64%	23	113,162	1.7%	51.2	1.5%	NM	NM	BATBC	201,258	5.5%	36.6	11.4x	3.5x
Mutual Fund	580	587	-7.30	-1.24%	37	27,075	0.4%	34.8	1.0%	NM	0.5x	SQRPHARMA	201,136	5.5%	107.0	9.9x	1.7x
General Insurance	2,654	2,679	-25.56	-0.95%	43	76,862	1.2%	62.7	1.8%	14.0x	1.2x	WALTONHIL	158,189	4.3%	12.7	11.7x	1.4x
Life Insurance	2,056	2,108	-52.22	-2.48%	15	54,660	0.8%	58.0	1.7%	NM	NM	ROBI	137,234	3.7%	19.5	29.4x	2.2x
Telecommunication	5,156	5,252	-95.60	-1.82%	3	597,016	9.0%	148.6	4.3%	14.4x	4.0x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	2,974	2,996	-21.97	-0.73%	34	564,231	8.5%	516.4	14.9%	14.6x	1.6x	ISLAMIBANK	93,379	2.5%	154.5	14.4x	1.3x
Fuel & Power	1,121	1,145	-23.93	-2.09%	23	295,151	4.5%	140.1	4.0%	19.4x	0.6x	BRACBANK	92,025	2.5%	143.1	9.4x	1.3x
Cement	2,181	2,177	+3.84	+0.18%	7	104,140	1.6%	11.8	0.3%	16.9x	2.3x	BERGERPBL	81,059	2.2%	4.8	25.1x	5.3x
Services & Real Estate	1,115	1,133	-18.34	-1.62%	9	61,652	0.9%	117.5	3.4%	19.4x	0.4x	RENATA	79,794	2.2%	2.6	22.1x	2.4x
Engineering	2,570	2,665	-95.32	-3.58%	42	296,898	4.5%	175.8	5.1%	12.2x	0.9x	MARICO	71,162	1.9%	4.7	14.2x	7.2x
Food & Allied	17,309	17,585	-276.70	-1.57%	21	317,784	4.8%	327.2	9.5%	16.7x	4.9x	LHBL	66,314	1.8%	5.3	13.9x	3.4x
IT	2,272	2,298	-25.44	-1.11%	11	29,897	0.5%	304.3	8.8%	24.7x	1.9x	ICB	51,082	1.4%	1.7	NM	1.2x
Textile	1,113	1,138	-24.85	-2.18%	58	115,456	1.7%	196.2	5.7%	NM	0.8x	UNILEVERCL	50,653	1.4%	0.1	57.1x	23.1x
Paper & Printing	4,556	4,727	-170.55	-3.61%	6	20,904	0.3%	42.9	1.2%	32.6x	0.9x	DUTCHBANGL	46,138	1.3%	1.2	6.0x	0.9x
Tannery	2,091	2,113	-22.35	-1.06%	6	22,902	0.3%	24.9	0.7%	37.7x	1.6x	POWERGRID	34,542	0.9%	1.3	NM	0.2x
Jute	16,192	16,703	-510.64	-3.06%	3	3,794	0.1%	57.9	1.7%	NM	NM	EBL	34,225	0.9%	12.6	4.9x	0.8x
Ceramics	377	383	-5.73	-1.50%	5	16,759	0.3%	42.8	1.2%	44.7x	1.0x	OLYMPIC	31,810	0.9%	26.6	19.0x	3.1x
Miscellaneous	4,059	4,107	-48.75	-1.19%	15	221,144	3.3%	107.9	3.1%	37.4x	1.7x	BXPHARMA	31,272	0.8%	48.8	5.9x	0.7x
Corporate Bond**	8,968	8,928	+39.51	+0.44%	16	35,624	0.5%	1.5	0.0%	NM	NM	PUBALIBANK	29,268	0.8%	6.5	3.4x	0.6x
Treasury Bond**	396	394	+1.90	+0.48%	235	2,910,292	44.0%	0.0	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
ISLAMIBANK	58.0	+4.7%	154.5	14.4x	1.3x	SQRPHARMA	117,112	8.6%	9.9x	1.7x	MIDLANDBNK	29.7	-0.7%	369.3	16.0x	2.1x
MERCINS	25.0	+4.6%	0.4	33.3x	1.2x	BEXIMCO	69,460	5.1%	NM	1.2x	AGNISYSL	36.3	+4.0%	235.5	33.9x	2.2x
ISLAMICFIN	14.4	+4.3%	13.9	NM	1.3x	BATBC	45,948	3.4%	11.4x	3.5x	ISLAMIBANK	58.0	+4.7%	154.5	14.4x	1.3x
TAKAFULINS	36.0	+4.0%	0.5	24.3x	1.9x	RENATA	35,002	2.6%	22.1x	2.4x	BRACBANK	52.0	-4.1%	143.1	9.4x	1.3x
AGNISYSL	36.3	+4.0%	235.5	33.9x	2.2x	ISLAMIBANK	33,649	2.5%	14.4x	1.3x	LOVELLO	81.9	+0.1%	142.6	59.3x	6.2x
ANLIMAYARN	29.3	+3.9%	1.1	NM	3.0x	BXPHARMA	32,479	2.4%	5.9x	0.7x	GP	325.8	-1.9%	114.7	12.4x	6.1x
ICBAMCL2ND	6.3	+3.3%	0.0	NM	1x	BRACBANK	32,157	2.4%	9.4x	1.3x	SQRPHARMA	226.9	+0.1%	107.0	9.9x	1.7x
EBL1STMF	3.3	+3.1%	0.8	NM	0.4x	GP	30,004	2.2%	12.4x	6.1x	BSC	69.4	-4.4%	70.9	4.7x	0.7x
FUWANGFOOD	13.8	+3.0%	29.0	NM	5.6x	LHBL	24,690	1.8%	13.9x	3.4x	SIBL	11.4	+2.7%	65.6	5.9x	0.5x
LIBRAINFU	898.3	+2.7%	14.8	NM	1.1x	EBL	24,199	1.8%	4.9x	0.8x	IBNSINA	316.0	-2.0%	63.7	14.7x	2.8x
						PUBALIBANK	20,448	1.5%	3.4x	0.6x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	16,930	1.2%	NM	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NTC	215.0	-8.7%	0.8	NM	NM	CITYBANK	16,830	1.2%	4.4x	0.8x	AGNISYSL	35.6	31.5	13.0	3,400	118.91
BSCPLC	120.4	-7.7%	14.4	13.3x	1x	BSRMLTD	14,210	1.0%	3.8x	0.5x	BEACONPHAR	108.0	108.0	1.0	230	24.84
RENWICKJA	673.1	-7.2%	0.0	NM	NM	ALARABANK	13,534	1.0%	9.8x	1.0x	BEXIMCO	127.1	104.1	24.0	140	14.84
KPPL	9.2	-7.1%	2.0	NM	NM	PRIMEBANK	12,985	1.0%	4.6x	0.7x	MIDLANDBNK	30.5	27.5	4.0	412	12.35
KBPPWBIL	120.4	-7.0%	16.3	NM	10.2x	OLYMPIC	12,616	0.9%	19.0x	3.1x	NBL	5.5	5.5	1.0	1,500	8.25
CENTRALPHL	9.9	-6.6%	4.9	NM	1.4x	UTTARABANK	11,350	0.8%	11.2x	0.8x	DAFODILCOM	79.0	79.0	1.0	50	3.95
GBBPOWER	7.1	-6.6%	0.6	NM	0.4x	ORIONPHARM	11,317	0.8%	8.0x	0.4x	AL-HAJTEX	131.8	126.0	2.0	28	3.67
SONALIFE	53.7	-6.3%	2.3	NM	NM	ROBI	10,738	0.8%	29.4x	2.2x	WALTONHIL	589.6	589.6	1.0	5	2.95
RAHIMAFOOD	99.1	-6.1%	9.0	NM	9.8x						ISLAMIBANK	58.9	52.8	3.0	50	2.71
DSHGARME	76.1	-6.0%	1.5	NM	4.1x						KBPPWBIL	117.0	117.0	1.0	21	2.40

* 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	Important DSE News
AGNISYSL	35.6	31.5	118.9	3,400	13	
BEACONPHAR	108.0	108.0	24.8	230	1	
BEXIMCO	127.1	104.1	14.8	140	24	
MIDLANDBNK	30.5	27.5	12.3	412	4	
NBL	5.5	5.5	8.3	1,500	1	
DAFODILCOM	79.0	79.0	4.0	50	1	
AL-HAJTEX	131.8	126.0	3.7	28	2	
WALTONHIL	589.6	589.6	2.9	5	1	
ISLAMIBANK	58.9	52.8	2.7	50	3	
KBPPWBIL	117.0	117.0	2.4	21	1	
FIRSTSBANK	8.1	8.1	2.1	260	1	
ACI	152.0	152.0	1.5	10	1	
IBNSINA	335.0	335.0	1.3	4	1	
BRACBANK	54.3	54.3	1.2	22	1	
PRAGATILIF	222.1	222.1	0.8	4	1	
FEKDIL	17.5	17.5	0.7	40	1	
GENNEXT	5.5	5.5	0.6	100	1	
GENNEXT	5.5	5.5	0.6	100	1	
BSC	78.8	78.8	0.5	7	1	
SEAPEARL	49.5	49.5	0.5	11	1	
SIBL	12.0	12.0	0.5	42	1	
Total			205.2		62	

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
BSCPLC		0.0%	40%	Record Date	4-Nov-24

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