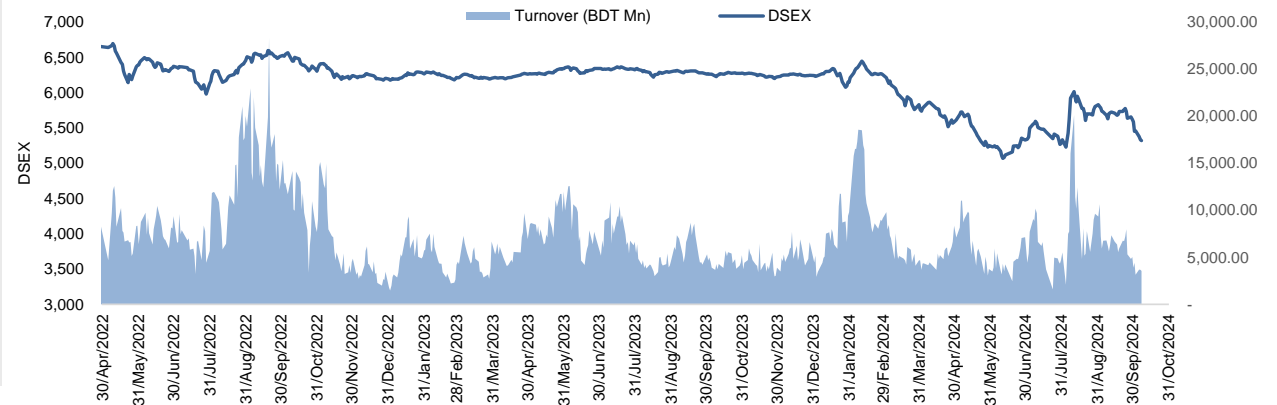


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.22%) lost 11.84 points and closed at 5,323.22. The blue-chip index DS30 (-0.16%), the Shariah-based index DSES (-0.14%), and the large-cap index CDSET (-0.49%) closed at 1,939.21, 1,187.74, and 1,086.49 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.95%, followed by Fuel & Power (+0.59%), Engineering (+0.12%), Pharmaceutical (-0.14%), NBFi (-0.35%), Food & Allied (-0.65%), and Bank (-1.07%), respectively. Block trades contributed 6.0% of the overall market turnover. BRAC Bank Ltd. (-4.4%) was the most traded share with a turnover of BDT 349 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 5,323.22 | 5,335.06 | -11.84 | -0.22% | -14.8% |
| DS30 | 1,939.21 | 1,942.22 | -3.01 | -0.16% | -7.4% |
| DSES | 1,187.74 | 1,189.39 | -1.65 | -0.14% | -12.9% |
| CDSET | 1,086.49 | 1,091.89 | -5.40 | -0.49% | -9.7% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 142 | 195 | 63 | 400 |
| A Category (Equity) | 81 | 116 | 37 | 234 |
| B Category (Equity) | 33 | 34 | 13 | 80 |
| N Category (Equity) | 2 | 2 | 0 | 4 |
| Z Category (Equity) | 26 | 43 | 13 | 82 |
| Mutual Funds | 8 | 10 | 18 | 36 |
| Corporate Bonds | 0 | 2 | 0 | 2 |
| Treasury Bonds | 1 | 3 | 0 | 4 |

| | Today | Last Day | Daily %Δ | |
|--------------|-----------|-----------|-----------|-------|
| Mcap | Mn BDT | 6,663,011 | 6,613,864 | +0.7% |
| | Mn USD | 55,525 | 55,116 | |
| Turnover | Mn BDT | 3,554 | 3,666 | -3.0% |
| | Mn USD | 30 | 31 | |
| Volume | Mn Shares | 124 | 129 | -3.8% |
| No. of Trade | | 117,041 | 119,183 | -1.8% |

* Average Interbank Exchange Rate is BDT 120.00 as of Oct 08, 2024

| | |
|---|---|
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|---|---|

Figure: Sectorial Turnover (BDT Mn)

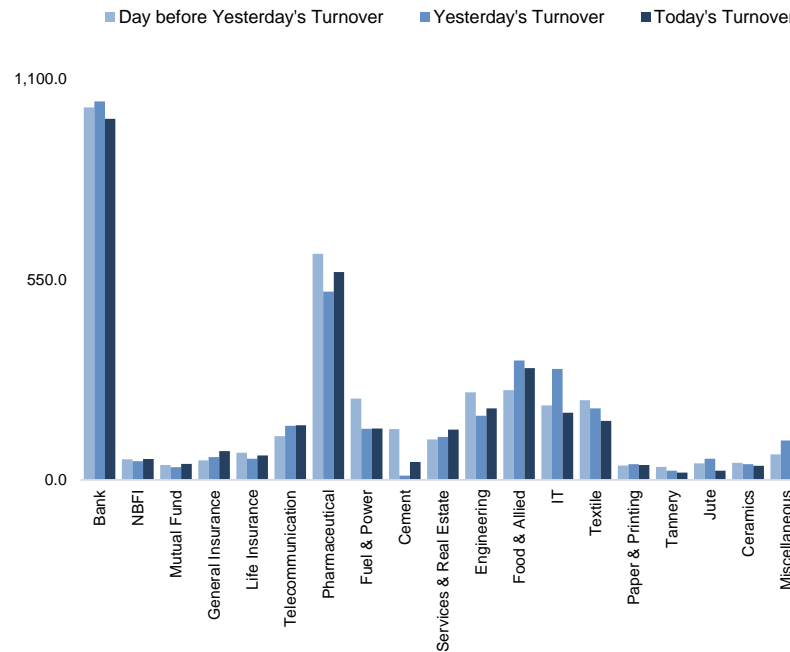
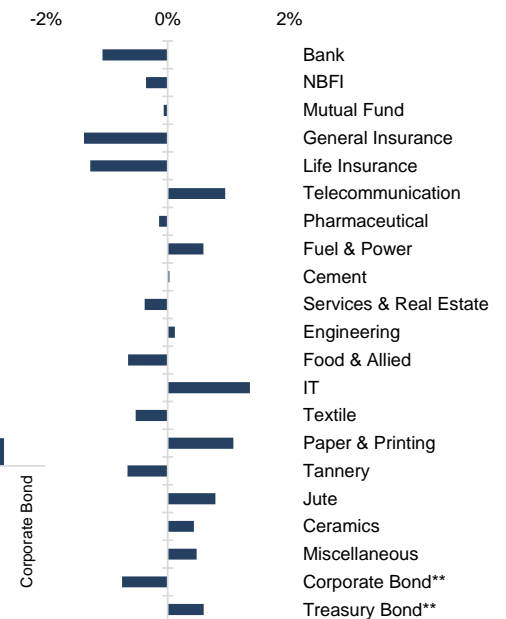


Figure: Sectorial Mcap Change



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 | 1,498 | 1,514 | -16.25 | -1.07% | 36 | 717,537 | 10.9% | 990.0 | 29.6% | 7.8x | 0.7x | GP | 444,789 | 12.1% | 120.7 | 12.6x | 6.2x |
| NBFI | 1,165 | 1,169 | -4.15 | -0.35% | 23 | 112,760 | 1.7% | 57.3 | 1.7% | NM | NM | SQURPHARMA | 198,033 | 5.4% | 162.0 | 9.8x | 1.6x |
| Mutual Fund | 579 | 580 | -0.39 | -0.07% | 37 | 27,057 | 0.4% | 44.2 | 1.3% | NM | 0.5x | BATBC | 196,884 | 5.4% | 52.5 | 11.2x | 3.4x |
| General Insurance | 2,617 | 2,654 | -36.50 | -1.38% | 43 | 75,805 | 1.1% | 78.9 | 2.4% | 13.8x | 1.2x | WALTONHIL | 156,705 | 4.3% | 13.2 | 11.6x | 1.4x |
| Life Insurance | 2,030 | 2,056 | -26.18 | -1.27% | 15 | 53,964 | 0.8% | 66.7 | 2.0% | NM | NM | ROBI | 137,234 | 3.7% | 19.2 | 29.4x | 2.2x |
| Telecommunication | 5,205 | 5,156 | +48.82 | +0.95% | 3 | 602,669 | 9.1% | 149.6 | 4.5% | 14.5x | 4.0x | BEXIMCO | 103,842 | 2.8% | 0.0 | NM | 1.2x |
| Pharmaceutical | 2,970 | 2,974 | -4.21 | -0.14% | 34 | 563,432 | 8.5% | 570.0 | 17.1% | 14.5x | 1.6x | ISLAMIBANK | 90,803 | 2.5% | 126.4 | 14.0x | 1.2x |
| Fuel & Power | 1,128 | 1,121 | +6.58 | +0.59% | 23 | 296,885 | 4.5% | 140.9 | 4.2% | 19.5x | 0.6x | BRACBANK | 87,955 | 2.4% | 348.7 | 9.0x | 1.2x |
| Cement | 2,181 | 2,181 | +0.66 | +0.03% | 7 | 104,172 | 1.6% | 49.0 | 1.5% | 16.9x | 2.3x | BERGERPBL | 80,642 | 2.2% | 1.3 | 24.9x | 5.3x |
| Services & Real Estate | 1,111 | 1,115 | -4.21 | -0.38% | 9 | 61,420 | 0.9% | 137.9 | 4.1% | 19.3x | 0.4x | RENATA | 79,393 | 2.2% | 3.3 | 22.0x | 2.3x |
| Engineering | 2,573 | 2,570 | +3.03 | +0.12% | 42 | 297,249 | 4.5% | 196.3 | 5.9% | 12.5x | 0.9x | MARICO | 71,004 | 1.9% | 1.0 | 14.2x | 7.1x |
| Food & Allied | 17,196 | 17,309 | -112.72 | -0.65% | 21 | 315,715 | 4.8% | 306.9 | 9.2% | 16.6x | 4.9x | LHBL | 66,779 | 1.8% | 14.0 | 14.0x | 3.5x |
| IT | 2,303 | 2,272 | +30.80 | +1.36% | 11 | 30,302 | 0.5% | 184.4 | 5.5% | 25.0x | 2.0x | ICB | 51,168 | 1.4% | 0.7 | NM | 1.2x |
| Textile | 1,107 | 1,113 | -5.85 | -0.53% | 58 | 114,850 | 1.7% | 161.4 | 4.8% | NM | 0.8x | UNILEVERCL | 50,589 | 1.4% | 0.2 | 57.0x | 23.1x |
| Paper & Printing | 4,606 | 4,556 | +49.14 | +1.08% | 6 | 21,130 | 0.3% | 41.0 | 1.2% | 33.0x | 0.9x | DUTCHBANGL | 44,732 | 1.2% | 4.8 | 5.8x | 0.9x |
| Tannery | 2,077 | 2,091 | -13.78 | -0.66% | 6 | 22,751 | 0.3% | 20.0 | 0.6% | 37.4x | 1.6x | POWERGRID | 34,451 | 0.9% | 0.5 | NM | 0.2x |
| Jute | 16,319 | 16,192 | +126.91 | +0.78% | 3 | 3,824 | 0.1% | 25.1 | 0.8% | NM | NM | EBL | 34,089 | 0.9% | 9.8 | 4.9x | 0.8x |
| Ceramics | 379 | 377 | +1.62 | +0.43% | 5 | 16,831 | 0.3% | 38.6 | 1.2% | 44.9x | 1.0x | OLYMPIC | 33,590 | 0.9% | 32.8 | 20.1x | 3.2x |
| Miscellaneous | 4,078 | 4,059 | +19.38 | +0.48% | 15 | 222,200 | 3.4% | 76.1 | 2.3% | 37.6x | 1.7x | BXPHARMA | 31,585 | 0.9% | 33.3 | 5.9x | 0.7x |
| Corporate Bond** | 8,901 | 8,968 | -67.19 | -0.75% | 16 | 35,043 | 0.5% | 0.8 | 0.0% | NM | NM | PUBALIBANK | 29,268 | 0.8% | 4.5 | 3.4x | 0.6x |
| Treasury Bond** | 398 | 396 | +2.35 | +0.59% | 235 | 2,913,548 | 44.1% | 5.0 | 0.2% | 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 |
|-----------------|-------------------|--------|-------------------|-------|-------|----------------------------|--------------------------|----------------------------|-------|------|-------------------|-------------------|-------|-------------------|-------|------|
| KBPPWBIL | 132.4 | +10.0% | 34.5 | NM | 11.2x | SQURPHARMA | 117,112 | 8.6% | 9.8x | 1.6x | BRACBANK | 49.7 | -4.4% | 348.7 | 9.0x | 1.2x |
| NTC | 233.8 | +8.7% | 45.6 | NM | NM | BEXIMCO | 69,460 | 5.1% | NM | 1.2x | SQURPHARMA | 223.4 | -1.5% | 162.0 | 9.8x | 1.6x |
| GPHISPAT | 26.0 | +7.4% | 45.0 | 17.5x | 0.5x | BATBC | 45,948 | 3.4% | 11.2x | 3.4x | ISLAMIBANK | 56.4 | -2.8% | 126.4 | 14.0x | 1.2x |
| REGENTTEX | 4.4 | +7.3% | 0.0 | NM | 0.2x | RENATA | 35,002 | 2.6% | 22.0x | 2.3x | GP | 329.4 | +1.1% | 120.7 | 12.6x | 6.2x |
| NEWLINE | 24.3 | +7.0% | 0.1 | 46.7x | 1.0x | ISLAMIBANK | 33,649 | 2.5% | 14.0x | 1.2x | AGNISYSL | 37.6 | +3.6% | 109.2 | 35.1x | 2.3x |
| AFTABAUTO | 33.5 | +7.0% | 39.1 | NM | 0.7x | BXPHARMA | 32,479 | 2.4% | 5.9x | 0.7x | LOVELLO | 86.2 | +5.3% | 93.3 | 62.5x | 6.5x |
| BEACONPHAR | 120.5 | +6.7% | 12.6 | 53.3x | 5x | BRACBANK | 32,157 | 2.4% | 9.0x | 1.2x | SIBL | 11.1 | -2.6% | 78.5 | 5.8x | 0.5x |
| DULAMIACOT | 70.6 | +6.3% | 0.0 | NM | NM | GP | 30,004 | 2.2% | 12.6x | 6.2x | MIDLANDBNK | 29.9 | +0.7% | 78.5 | 16.1x | 2.1x |
| ORIONPHARM | 37.1 | +5.7% | 53.2 | 8.5x | 0.4x | LHBL | 24,690 | 1.8% | 14.0x | 3.5x | UNIQUEHRL | 50.1 | -0.8% | 64.1 | 9.7x | 0.6x |
| OLYMPIC | 168.0 | +5.6% | 32.8 | 20.1x | 3.2x | EBL | 24,199 | 1.8% | 4.9x | 0.8x | NRBBANK | 11.7 | +5.4% | 61.2 | 14.2x | 0.9x |

| Top Ten Losers | 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 | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) | |
|----------------|-------------------|-------|-------------------|-------|------|----------------------------|--------------------------|----------------------------|-------|------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|-------|
| TOSRIFA | 19.8 | -8.3% | 4.6 | 33.0x | 0.6x | PUBALIBANK | 20,448 | 1.5% | 3.4x | 0.6x | KBPPWBIL | 110.0 | 108.7 | 9.0 | 550 | 59.99 | |
| MEGHNAPET | 23.7 | -6.7% | 0.6 | NM | NM | NBL | 16,930 | 1.2% | NM | 1.5x | LOVELLO | 85.5 | 80.0 | 5.0 | 359 | 29.59 | |
| BIFC | 8.7 | -6.5% | 0.9 | NM | NM | CITYBANK | 16,830 | 1.2% | 4.4x | 0.8x | ALARABANK | 13,534 | 10.0% | 9.7x | 1.0x | 604 | 21.24 |
| PRIMELIFE | 33.8 | -6.1% | 0.9 | NM | NM | BSRMLTD | 14,210 | 1.0% | 3.9x | 0.5x | PRIMEBANK | 12,985 | 1.0% | 4.8x | 0.8x | 604 | 21.24 |
| PROVATIINS | 26.6 | -6.0% | 6.9 | 16.7x | 1.2x | OLYMPIC | 12,616 | 0.9% | 20.1x | 3.2x | NRBCBANK | 9.4 | 9.4 | 1.0 | 1,600 | 15.04 | |
| PRIMETEX | 12.5 | -5.3% | 0.1 | NM | 0.2x | UTTARABANK | 11,350 | 0.8% | 11.1x | 0.8x | SQURPHARMA | 230.0 | 230.0 | 2.0 | 62 | 14.18 | |
| GLOBALINS | 22.1 | -5.2% | 3.2 | 15.5x | 1.5x | ORIONPHARM | 11,317 | 0.8% | 8.5x | 0.4x | BEXIMCO | 105.0 | 104.1 | 21.0 | 135 | 14.08 | |
| RSRMSTEEL | 11.2 | -5.1% | 0.8 | NM | 0.2x | ROBI | 10,738 | 0.8% | 29.4x | 2.2x | PRAGATILIF | 235.0 | 225.0 | 5.0 | 47 | 10.63 | |
| BDFINANCE | 14.2 | -4.7% | 3.7 | NM | 1.2x | | | | | | BRACBANK | 51.2 | 50.8 | 2.0 | 168 | 8.54 | |
| JUTESPINN | 200.6 | -4.6% | 0.2 | NM | NM | | | | | | NBL | 5.4 | 5.4 | 1.0 | 1,500 | 8.10 | |
| | | | | | | | | | | | BEACHHATCH | 81.0 | 80.0 | 2.0 | 60 | 4.85 | |

* 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 |
|--------------|---------------------|---------------|-------------------|-----------------|--------------|
| KBPPWBIL | 110.0 | 108.7 | 60.0 | 550 | 9 |
| LOVELLO | 85.5 | 80.0 | 29.6 | 359 | 5 |
| AGNISYSL | 35.6 | 35.0 | 21.2 | 604 | 11 |
| NRBCBANK | 9.4 | 9.4 | 15.0 | 1,600 | 1 |
| SQURPHARMA | 230.0 | 230.0 | 14.2 | 62 | 2 |
| BEXIMCO | 105.0 | 104.1 | 14.1 | 135 | 21 |
| PRAGATILIF | 235.0 | 225.0 | 10.6 | 47 | 5 |
| BRACBANK | 51.2 | 50.8 | 8.5 | 168 | 2 |
| NBL | 5.4 | 5.4 | 8.1 | 1,500 | 1 |
| BEACHHATCH | 81.0 | 80.0 | 4.9 | 60 | 2 |
| GP | 330.0 | 300.0 | 3.8 | 12 | 2 |
| LHBL | 62.8 | 62.8 | 3.1 | 50 | 1 |
| BSCPLC | 132.4 | 132.4 | 3.0 | 23 | 1 |
| CAPITECGBF | 9.5 | 9.5 | 2.9 | 300 | 1 |
| ANWARGALV | 106.0 | 106.0 | 2.1 | 20 | 1 |
| DELTALIFE | 90.0 | 90.0 | 2.0 | 22 | 1 |
| BATBC | 340.2 | 340.2 | 1.7 | 5 | 1 |
| BATBC | 340.2 | 340.2 | 1.7 | 5 | 1 |
| MIDLANDBNK | 28.5 | 28.5 | 1.4 | 50 | 1 |
| AIL | 85.3 | 85.3 | 1.4 | 17 | 1 |
| PUBALIBANK | 22.9 | 22.9 | 1.2 | 52 | 1 |
| FEDERALINS | 19.5 | 19.5 | 1.0 | 50 | 1 |
| Total | | | 214.0 | | 77 |

Important DSE News

NRBCBANK

Mr. Sarwar Zaman Chaudri, a Sponsor of the Company, has expressed his intention to buy 16,00,000 shares of the Company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within October 31, 2024.

GPHISPAT

The Board of Directors has recommended 10% Cash Dividend (only for General Shareholders except Sponsors and Directors) for the year ended June 30, 2024. The Sponsors and Directors hold 226,247,351 shares out of total 483,883,456 shares of the company and Cash Dividend payable to the General Shareholders is Tk. 257,636,105.00. Date of AGM: 12.12.2024, Time: 3:00 PM, Venue: Digital Platform. Record Date: 04.11.2024. The Company has reported EPS of Tk. 1.77, NAV per share of Tk. 52.43 and NOCFPS of Tk. 9.89 for the year ended June 30, 2024, as against Tk. 0.58, Tk. 53.08 and Tk. 2.94 respectively for the year ended June 30, 2023. Reasons for deviation in EPS and NOCFPS: Earnings Per Share (EPS) has increased to Tk. 1.77 from Tk. 0.58 in the previous year.

The Board of Directors of the company has decided to issue Non-Convertible, Cumulative, Redeemable and Non-Participative Preference Shares amounting up to BDT 5,000 million to refinance the existing loans with preference shares subject to approval from Bangladesh Securities and Exchange Commission (BSEC).

LHBL

Dhaka Stock Exchange PLC. (DSE) has approved the name change of the Company. Accordingly, the name of the Company will be 'LafargeHolcim Bangladesh PLC.' instead of 'LafargeHolcim Bangladesh Limited' and DSE Trading Code of the company will be "LHB" instead of "LHBL" with effect from October 09, 2024. Other information (except Name of the Company and Trading Code) of the securities shall remain unchanged

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 |
| GPHISPAT | | 0.0% | 10% | Record Date | 4-Nov-24 |

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