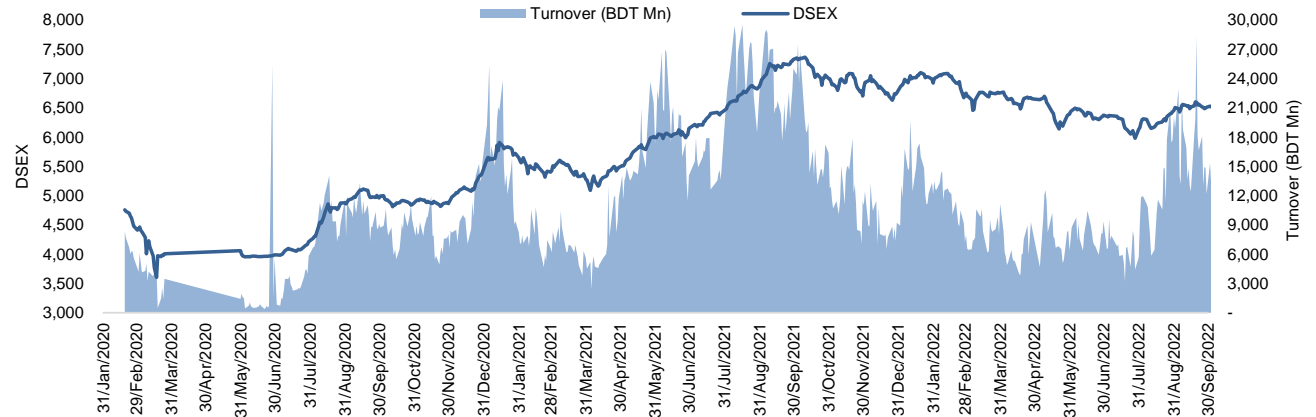


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.82%) lost 119.88 points and closed at 6,449.63. The blue-chip index DS30 (-2.01%), the Shariah-based index DSES (-1.91%), and the large-cap index CDSET (-1.52%) closed at 2,314.13, 1,415.86, and 1,262.29 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.08% followed by Pharmaceutical (-1.96%), Fuel & Power (-1.47%), Engineering (-1.16%), Food & Allied (-0.57%), Bank (-0.34%), and Telecommunication (-0.06%), respectively. Block trades contributed 0.9% of the overall market turnover. Orion Pharma Ltd. (-8.9%) was the most traded share with a turnover of BDT 1,503 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,449.63	6,569.51	-119.88	-1.82%	-4.5%
DS30	2,314.13	2,361.57	-47.43	-2.01%	-8.6%
DSES	1,415.86	1,443.48	-27.62	-1.91%	-1.1%
CDSET	1,262.29	1,281.71	-19.42	-1.52%	-7.1%

	Advanced	Declined	Unchanged	Total
All Category	19	167	183	369
A Category (Equity)	14	122	114	250
B Category (Equity)	5	37	51	93
N Category (Equity)	0	3	3	6
Z Category (Equity)	0	5	15	20
Mutual Funds	0	0	29	29
Corporate Bonds	0	1	2	3

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,725,144	5,216,765	+48.1%
	Mn USD	75,983	51,311	
Turnover	Mn BDT	14,175	11,698	+21.2%
	Mn USD	139	115	
Volume	Mn Shares	204	186	+9.5%
No. of Trade		217,185	188,351	+15.3%

\* Average Interbank Exchange Rate is BDT 101.67 as of Oct 06, 2022

Figure: Sectorial Turnover (BDT)

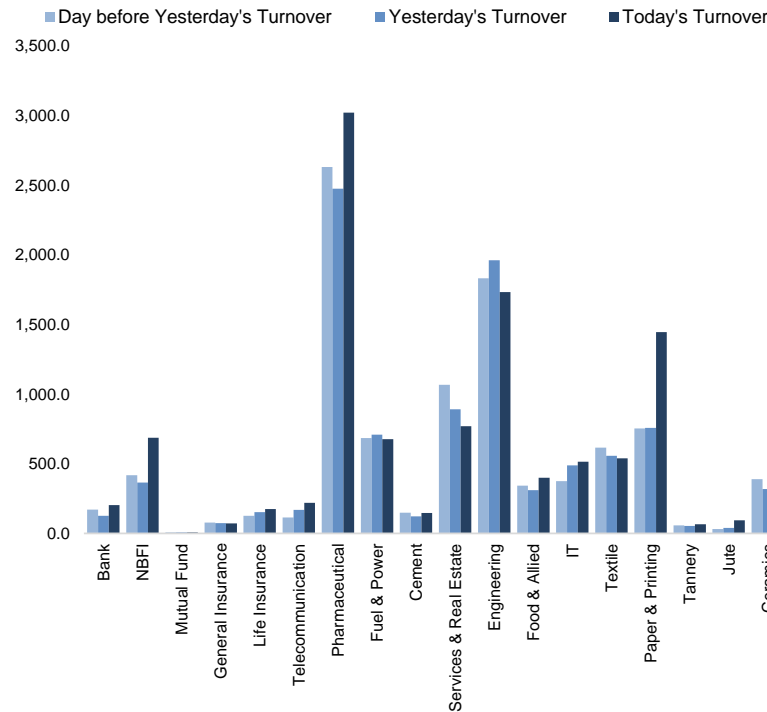
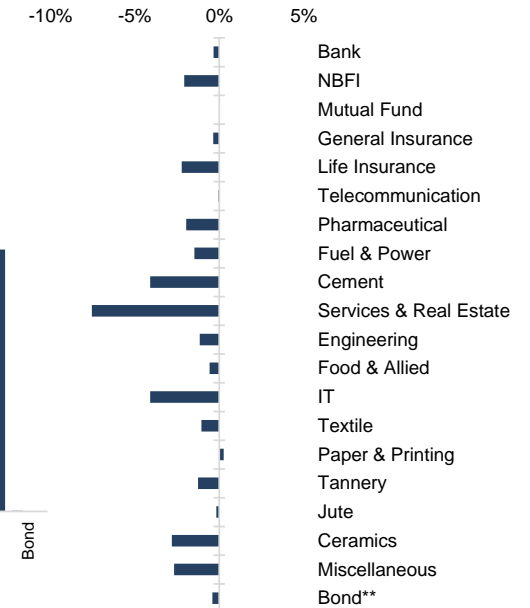


Figure: Sectorial Mcap Change



Market PE 15.9x  
Market PB 1.7x

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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	1,440	1,444	-4.95	-0.34%	33	663,683	14.6%	202.9	1.5%	7.7x	0.8x	GP	386,996	8.5%	4.9	11.4x	7.7x
NBFI	1,950	1,991	-41.33	-2.08%	23	190,195	4.2%	686.2	5.2%	NM	3.8x	WALTONHIL	317,378	7.0%	0.2	26.1x	3.1x
Mutual Fund	854	854	-	-	37	38,632	0.8%	7.8	0.1%	NM	0.8x	BATBC	280,098	6.2%	11.7	18.1x	7.4x
General Insurance	3,132	3,143	-11.23	-0.36%	41	90,827	2.0%	71.0	0.5%	14.6x	1.5x	SQURPHARMA	185,977	4.1%	108.2	10.0x	1.9x
Life Insurance	2,380	2,434	-54.09	-2.22%	13	66,335	1.5%	174.4	1.3%	NM	NM	ROBI	157,138	3.5%	1.1	NM	2.4x
Telecommunication	4,946	4,949	-2.81	-0.06%	3	580,248	12.7%	218.4	1.7%	15.5x	4.6x	RENATA	139,694	3.1%	6.3	25.2x	4.9x
Pharmaceutical	3,985	4,064	-79.67	-1.96%	32	760,596	16.7%	3,020.3	22.9%	18.8x	2.7x	UPGDCL	135,591	3.0%	7.0	11.0x	4.1x
Fuel & Power	1,710	1,736	-25.56	-1.47%	23	450,874	9.9%	675.6	5.1%	11.4x	1.1x	BEXIMCO	113,133	2.5%	1,154.6	7.9x	1.5x
Cement	2,453	2,558	-104.78	-4.10%	7	117,841	2.6%	146.5	1.1%	25.6x	2.6x	BEACONPHAR	82,375	1.8%	110.7	88.0x	14.1x
Services & Real Estate	1,746	1,889	-142.51	-7.55%	8	68,989	1.5%	768.8	5.8%	85.5x	1.3x	LHBL	81,296	1.8%	133.3	20.8x	4.6x
Engineering	4,559	4,613	-53.51	-1.16%	42	535,185	11.7%	1,732.3	13.1%	20.2x	1.9x	BERGERPBL	80,104	1.8%	0.7	26.0x	7.0x
Food & Allied	21,233	21,355	-121.83	-0.57%	21	378,350	8.3%	398.8	3.0%	22.7x	8.0x	MARICO	76,454	1.7%	1.0	21.8x	33.2x
IT	2,816	2,936	-120.14	-4.09%	11	36,709	0.8%	515.1	3.9%	30.3x	2.6x	ICB	75,344	1.7%	3.8	42.6x	1.7x
Textile	1,674	1,692	-17.96	-1.06%	58	176,135	3.9%	538.6	4.1%	26.5x	1.1x	BXPHARMA	72,716	1.6%	86.9	12.7x	1.8x
Paper & Printing	11,649	11,619	+30.22	+0.26%	6	44,882	1.0%	1,446.3	11.0%	NM	3.1x	BRACBANK	57,619	1.3%	15.7	11.3x	1.0x
Tannery	3,088	3,127	-39.05	-1.25%	6	33,247	0.7%	65.6	0.5%	34.9x	3.2x	ISLAMIBANK	52,969	1.2%	38.2	10.9x	0.8x
Jute	11,100	11,119	-18.96	-0.17%	3	2,715	0.1%	94.6	0.7%	NM	38.3x	DUTCHBANGL	44,389	1.0%	1.4	7.7x	1.2x
Ceramics	721	741	-20.77	-2.80%	5	33,334	0.7%	541.4	4.1%	31.3x	2.0x	TITASGAS	40,657	0.9%	35.2	12.2x	0.6x
Miscellaneous	4,488	4,611	-123.50	-2.68%	15	251,742	5.5%	1,879.3	14.3%	12.3x	2.1x	POWERGRID	37,347	0.8%	52.7	10.2x	0.4x
Bond**	90	90	-0.36	-0.40%	9	37,127	0.8%	1.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.5	9.4x	1.0x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
IBP	23.1	+10.0%	199.0	22.7x	1.6x
NAVANACNG	32.0	+9.6%	63.9	NM	1.0x
MONNOCERA	113.8	+9.5%	201.1	NM	1.4x
AFTABAUTO	31.6	+9.0%	54.7	NM	0.6x
ORIONINFU	799.7	+6.1%	260.8	NM	59.0x
TAMIJTEX	241.3	+5.9%	85.6	40.3x	2.9x
SONALIPAPR	739.7	+5.8%	816.9	78.4x	4x
MONOSPOOL	280.6	+5.0%	213.3	51.5x	6.3x
BDCOM	74.1	+4.1%	192.3	49.5x	4.8x
HAKKANIPUL	70.4	+4.0%	56.4	NM	3.0x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,685	7.0%	10.0x	1.9x
BEXIMCO	78,571	4.5%	7.9x	1.5x
BATBC	74,086	4.3%	18.1x	7.4x
RENATA	68,199	3.9%	25.2x	4.9x
BEACONPHAR	57,662	3.3%	88.0x	14.1x
BXPHARMA	50,771	2.9%	12.7x	1.8x
GP	38,700	2.2%	11.4x	7.7x
BRACBANK	30,976	1.8%	11.3x	1.0x
LHBL	28,714	1.7%	20.8x	4.6x
ISLAMIBANK	23,794	1.4%	10.9x	0.8x
EBL	23,659	1.4%	7.5x	1.0x
ORIONPHARM	21,472	1.2%	32.9x	1.6x
PUBALIBANK	19,300	1.1%	5.7x	0.7x
NBL	19,116	1.1%	NM	0.5x
CITYBANK	18,180	1.0%	4.7x	0.7x
ROBI	15,714	0.9%	NM	2.4x
ALARABANK	14,857	0.9%	12.2x	1.1x
OLYMPIC	14,833	0.9%	16.7x	2.7x
BSRMLTD	14,706	0.8%	5.1x	0.7x
UPGDCL	13,559	0.8%	11.0x	4.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONPHARM	134.9	-8.9%	1,503.2	32.9x	1.6x
BEXIMCO	129.1	-1.7%	1,154.6	7.9x	1.5x
SONALIPAPR	739.7	+5.8%	816.9	78.4x	4.4x
IPDC	57.7	-7.1%	494.9	23.5x	3.4x
EHL	109.3	-1.3%	344.7	18.6x	1.5x
JHRML	118.8	-8.6%	323.2	40.1x	3.9x
BBS	30.1	-9.3%	289.6	27.0x	1.9x
SPCERAMICS	49.5	-9.2%	288.9	NM	1.6x
ORIONINFU	799.7	+6.1%	260.8	NM	59.0x
INTRACO	45.4	-4.4%	245.4	43.5x	3.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
COPPERTECH	46.1	-9.8%	171.9	26.6x	3.5x
PENINSULA	32.6	-9.7%	57.5	48.7x	1x
BPML	76.5	-9.7%	137.7	28.2x	1.7x
MALEKSPIN	33.9	-9.6%	89.8	7.8x	0.7x
UNIQUEHRL	63.7	-9.5%	147.0	21.7x	0.7x
BSC	142.1	-9.5%	223.0	10.5x	2.1x
BSCABLES	54.8	-9.4%	160.8	14.2x	1.6x
BBS	30.1	-9.3%	289.6	27.0x	1.9x
SPCL	77.8	-9.3%	90.2	10.4x	2.0x
ADNTEL	75.9	-9.3%	72.1	29.3x	2.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONALIPAPR	751.7	680.0	39.0	467	335.24
ORIONINFU	802.0	710.0	17.0	227	174.16
FORTUNE	82.9	79.7	7.0	2,121	170.70
ORIONPHARM	162.3	142.9	8.0	602	88.54
IPDC	67.1	63.0	6.0	729	47.78
BATBC	518.7	518.7	3.0	58	30.31
SQURPHARMA	209.8	209.8	1.0	130	27.30
BEXIMCO	140.0	140.0	1.0	100	14.00
METROSPIN	51.8	51.8	1.0	250	12.95
JHRML	135.0	133.0	4.0	89	11.98

\*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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	751.7	680.0	335.2	467	39
ORIONINFU	802.0	710.0	174.2	227	17
FORTUNE	82.9	79.7	170.7	2,121	7
ORIONPHARM	162.3	142.9	88.5	602	8
IPDC	67.1	63.0	47.8	729	6
BATBC	518.7	518.7	30.3	58	3
SQURPHARMA	209.8	209.8	27.3	130	1
BEXIMCO	140.0	140.0	14.0	100	1
METROSPIN	51.8	51.8	13.0	250	1
JHRML	135.0	133.0	12.0	89	4
KEYACOSMET	8.6	8.1	10.7	1,245	3
BRACBANK	38.5	38.5	8.9	231	1
AL-HAJTEX	142.5	132.7	8.1	59	4
LHBL	81.4	75.9	5.6	71	3
PENINSULA	38.9	38.9	5.3	137	1
BDFINANCE	44.1	44.1	4.9	112	1
BBSCABLES	65.0	65.0	4.7	72	2
FAREASTLIF	95.0	95.0	3.6	38	2
TAMIJTEX	220.0	217.0	3.0	14	2
RDFOOD	42.6	42.6	2.1	50	1
MALEKSPIN	41.0	41.0	2.1	50	1
INTRACO	45.5	45.5	2.0	45	2
<b>Total</b>			<b>990.0</b>		<b>130</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Eastern Housing Limited	-	0.0%	20.0%	Record Date	12-Oct-22
Phoenix Finance and Investments Ltd.	-	0.0%	0.0%	Record Date	13-Oct-22
ADN Telecom Limited	-	0.0%	10.0%	Record Date	13-Oct-22
Rupali Bank Ltd.	-	2.0%	0.0%	Record Date	16-Oct-22
Bangladesh Industrial Fin. Co. Ltd.	-	0.0%	0.0%	Record Date	20-Oct-22
Meghna Insurance Company Limited	-	0.0%	3.0%	Record Date	24-Oct-22
Bangladesh Monospool Paper Manufacturing Co. Limited	-	10.0%	10.0%	Record Date	24-Oct-22
Paper Processing & Packaging Limited	-	7.0%	8.0%	Record Date	24-Oct-22
Apex Footwear Limited.	-	10.0%	35.0%	Record Date	24-Oct-22
KDS Accessories Limited	-	0.0%	16.0%	Record Date	1-Nov-22
Doreen Power Generations and Systems Limited	-	12.0%	18.0%	Record Date	6-Nov-22
eGeneration Limited	-	0.0%	10.0%	Record Date	15-Nov-22

**Important DSE News**
**MONOSPPOOL**

Bangladesh Development Group Ltd., one of the Corporate Directors of the Company, has further informed that it has completed its sale of 3,81,474 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 29.08.2022.

**MTB**

Mr. Syed Manzur Elahi, one of the Sponsor Directors of the company, has expressed his intention to buy 2,50,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within October 31, 2022.

**TAKAFULINS**

The Company has informed that Takaful Islami Securities Limited, a subsidiary company of Takaful Islami Insurance Limited has commenced business operations (buying and selling of shares) from October 06, 2022.

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