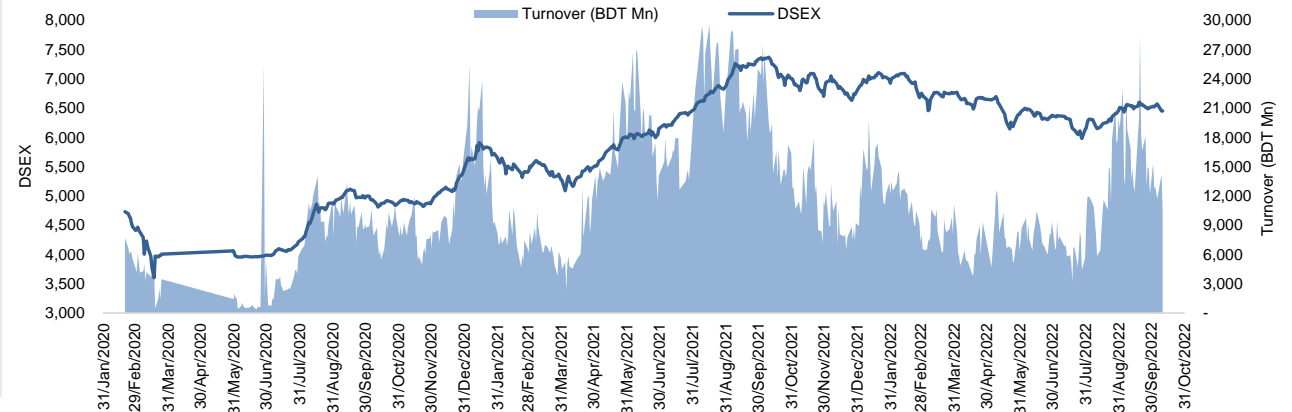


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.00%) gained 0.29 points and closed at 6,449.92. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (-0.06%), and the large-cap index CDSET (-0.26%) closed at 2,310.05, 1,415.02, and 1,258.96 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.12% followed by Pharmaceutical (+0.11%), NBF1 (+0.10%). Fuel & Power experienced the highest loss of 0.11% followed by Bank (-0.09%), Engineering (-0.05%), Telecommunication (0.00%). Block trades contributed 0.9% of the overall market turnover. Orion Pharma Ltd. (+2.7%) was the most traded share with a turnover of BDT 917 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,449.92	6,449.63	+0.29	+0.00%	-4.5%
DS30	2,310.05	2,314.13	-4.08	-0.18%	-8.8%
DSES	1,415.02	1,415.86	-0.84	-0.06%	-1.1%
CDSET	1,258.96	1,262.29	-3.33	-0.26%	-7.4%

	Advanced	Declined	Unchanged	Total
All Category	73	80	215	368
A Category (Equity)	53	58	140	251
B Category (Equity)	15	18	57	90
N Category (Equity)	1	2	3	6
Z Category (Equity)	4	2	15	21
Mutual Funds	0	0	31	31
Corporate Bonds	1	0	1	2
Treasury Bonds	2	0	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,720,704	7,725,144	-0.1%
	Mn USD	73,583	73,625	
Turnover	Mn BDT	10,104	14,175	-28.7%
	Mn USD	96	135	
Volume	Mn Shares	156	204	-23.6%
	No. of Trade	162,328	217,185	-25.3%

* Average Interbank Exchange Rate is BDT 104.93 as of Oct 10, 2022

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Figure: Sectorial Turnover (BDT)

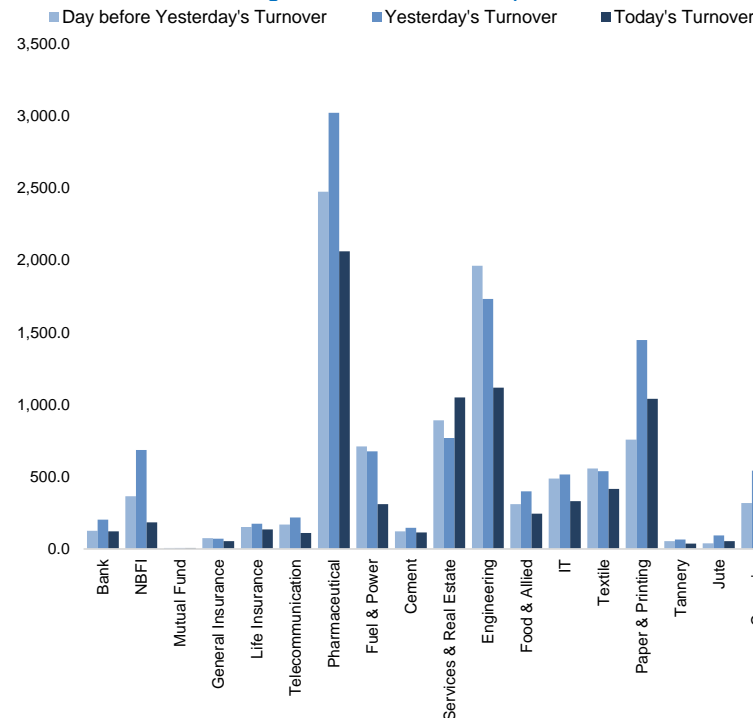
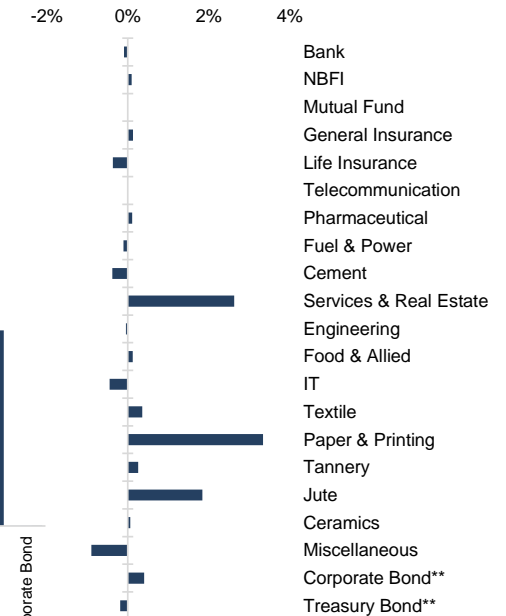


Figure: Sectorial Mcap Change



Market PE 15.6x

Market PB 1.6x

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	1,438	1,440	-1.32	-0.09%	33	663,076	8.6%	122.7	1.4%	7.7x	0.8x	GP	386,996	8.5%	5.4	11.4x	7.7x
NBFI	1,952	1,950	+1.92	+0.10%	23	190,382	2.5%	184.9	2.0%	NM	3.8x	WALTONHIL	317,378	7.0%	0.5	26.1x	3.1x
Mutual Fund	854	854	-	-	37	38,632	0.5%	7.0	0.1%	NM	0.8x	BATBC	280,098	6.2%	8.7	18.1x	7.4x
General Insurance	3,136	3,132	+3.97	+0.13%	41	90,943	1.2%	53.5	0.6%	14.7x	1.5x	SQURPHARMA	185,977	4.1%	15.2	10.0x	1.9x
Life Insurance	2,371	2,380	-8.72	-0.37%	13	66,092	0.9%	135.1	1.5%	NM	NM	ROBI	157,138	3.5%	0.2	NM	2.4x
Telecommunication	4,946	4,946	-0.14	-0.00%	3	580,232	7.5%	111.3	1.2%	15.5x	4.6x	RENATA	139,694	3.1%	6.6	25.2x	4.9x
Pharmaceutical	3,989	3,985	+4.34	+0.11%	32	761,425	9.9%	2,060.3	22.7%	18.8x	2.7x	UPGDCL	135,649	3.0%	3.8	11.0x	4.1x
Fuel & Power	1,708	1,710	-1.84	-0.11%	23	450,389	5.8%	311.3	3.4%	11.4x	1.1x	BEXIMCO	112,432	2.5%	711.6	7.8x	1.5x
Cement	2,444	2,453	-9.39	-0.38%	7	117,391	1.5%	113.9	1.3%	25.6x	2.5x	BEACONPHAR	81,381	1.8%	60.5	87.0x	13.9x
Services & Real Estate	1,792	1,746	+45.92	+2.63%	8	70,804	0.9%	1,049.9	11.6%	87.7x	1.4x	LHBL	80,948	1.8%	107.0	20.7x	4.6x
Engineering	4,557	4,559	-2.13	-0.05%	42	534,935	6.9%	1,116.9	12.3%	20.1x	1.9x	MARICO	76,621	1.7%	1.6	21.9x	33.3x
Food & Allied	21,260	21,233	+26.03	+0.12%	21	378,813	4.9%	244.6	2.7%	22.7x	8.0x	ICB	75,505	1.7%	2.0	42.7x	1.7x
IT	2,803	2,816	-12.56	-0.45%	11	36,545	0.5%	331.1	3.6%	30.1x	2.6x	BXPBARMA	71,601	1.6%	44.3	12.5x	1.8x
Textile	1,680	1,674	+6.01	+0.36%	58	176,767	2.3%	416.5	4.6%	26.6x	1.1x	BRACBANK	57,619	1.3%	8.7	11.3x	1.0x
Paper & Printing	12,039	11,649	+389.56	+3.34%	6	46,383	0.6%	1,040.6	11.5%	NM	3.2x	ISLAMIBANK	52,486	1.2%	4.6	10.8x	0.8x
Tannery	3,096	3,088	+7.94	+0.26%	6	33,332	0.4%	36.4	0.4%	35.0x	3.2x	DUTCHBANGL	43,832	1.0%	6.9	7.6x	1.1x
Jute	11,305	11,100	+204.96	+1.85%	3	2,765	0.0%	54.6	0.6%	NM	39.0x	TITASGAS	41,053	0.9%	40.0	12.3x	0.6x
Ceramics	721	721	+0.46	+0.06%	5	33,355	0.4%	336.5	3.7%	31.3x	2.0x	POWERGRID	37,347	0.8%	21.8	10.2x	0.4x
Miscellaneous	4,447	4,488	-40.29	-0.90%	15	249,482	3.2%	1,353.8	14.9%	12.2x	2.1x	SUMITPOWER	36,308	0.8%	0.2	9.4x	1.0x
Corporate Bond**	90	90	+0.36	+0.40%	9	37,277	0.5%	0.2	0.0%	NM	NM	BSCCL	36,098	0.8%	105.7	15.7x	3.4x
Treasury Bond**	100	100	-0.18	-0.18%	250	3,162,272	41.0%	0.9	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
BIFC	11.2	+9.8%	1.7	NM	NM	SQURPHARMA	121,685	7.0%	10.0x	1.9x	ORIONPHARM	138.6	+2.7%	916.9	33.8x	1.7x
BDWELDING	24.7	+9.8%	6.8	NM	2.1x	BEXIMCO	78,084	4.5%	7.8x	1.5x	BEXIMCO	128.3	-0.6%	711.6	7.8x	1.5x
SEAPEARL	131.0	+9.7%	200.5	NM	11.4x	BATBC	74,086	4.3%	18.1x	7.4x	EHL	116.8	+6.9%	576.0	19.9x	1.6x
APEXFOODS	264.0	+8.7%	51.3	92.6x	2.0x	RENATA	68,199	3.9%	25.2x	4.9x	SONALIPAPR	793.1	+7.2%	527.7	84.1x	4.8x
MONOSPOOL	305.1	+8.7%	164.1	56.0x	6.8x	BEACONPHAR	56,967	3.3%	87.0x	13.9x	IBP	25.1	+8.7%	399.1	24.7x	1.7x
IBP	25.1	+8.7%	399.1	24.7x	1.7x	BXPBARMA	49,992	2.9%	12.5x	1.8x	BSC	134.9	-5.1%	259.2	10.0x	1.9x
PAPERPROC	269.8	+8.6%	207.8	58.4x	9x	GP	38,700	2.2%	11.4x	7.7x	JHRML	116.0	-2.4%	248.7	39.2x	3.8x
TAMIJTEX	261.9	+8.5%	89.0	43.7x	3.1x	BRACBANK	30,976	1.8%	11.3x	1.0x	BBS	29.1	-3.3%	239.8	26.1x	1.9x
APEXSPINN	149.6	+8.3%	32.6	48.3x	2.6x	LHBL	28,591	1.6%	20.7x	4.6x	PAPERPROC	269.8	+8.6%	207.8	58.4x	8.5x
ORIONINFU	859.6	+7.5%	126.7	NM	63.4x	EBL	23,659	1.4%	7.5x	1.0x	SEAPEARL	131.0	+9.7%	200.5	NM	11.4x

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)
PENINSULA	30.0	-8.0%	71.3	44.8x	1.0x	ORIONPHARM	22,061	1.3%	33.8x	1.7x	IPDC	63.4	60.0	12.0	5,117	307.56
NAVANACNG	29.7	-7.2%	45.4	NM	1x	PUBALIBANK	19,300	1.1%	5.7x	0.7x	SONALIPAPR	780.0	718.0	17.0	373	286.68
AFTABAUTO	29.7	-6.0%	20.5	NM	0.5x	NBL	19,116	1.1%	NM	0.5x	FORTUNE	82.5	82.5	3.0	2,018	166.49
BPML	72.6	-5.1%	117.0	26.8x	1.6x	CITYBANK	18,019	1.0%	4.7x	0.7x	DELTA LIFE	153.8	153.8	4.0	512	78.73
BSC	134.9	-5.1%	259.2	10.0x	1.9x	ROBI	15,714	0.9%	NM	2.4x	ORIONINFU	859.0	750.0	5.0	43	36.28
NPOLYMER	56.8	-4.5%	73.3	18.5x	2.0x	ALARABANK	15,042	0.9%	12.3x	1.1x	SEAPEARL	120.0	120.0	6.0	207	24.87
RSRMSTEEL	20.1	-3.8%	5.0	NM	0.4x	OLYMPIC	14,978	0.9%	16.8x	2.7x	BDCOM	66.7	66.7	1.0	299	19.97
ADNTEL	73.0	-3.8%	27.1	28.2x	2.7x	BSRMLTD	14,754	0.8%	5.1x	0.7x	MARICO	2,435.0	2,435.0	3.0	8	19.72
FAREASTLIF	78.8	-3.8%	41.6	NM	NM	UPGDCL	13,565	0.8%	11.0x	4.1x	ORIONPHARM	144.0	140.0	4.0	125	17.80
BBS	29.1	-3.3%	239.8	26.1x	1.9x	SUMITPOWER	13,358	0.8%	9.4x	1.0x	AIL	53.4	53.4	2.0	316	16.86

* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
IPDC	63.4	60.0	307.6	5,117	12
SONALIPAPR	780.0	718.0	286.7	373	17
FORTUNE	82.5	82.5	166.5	2,018	3
DELTALIFE	153.8	153.8	78.7	512	4
ORIONINFU	859.0	750.0	36.3	43	5
SEAPEARL	120.0	120.0	24.9	207	6
BDCOM	66.7	66.7	20.0	299	1
MARICO	2,435.0	2,435.0	19.7	8	3
ORIONPHARM	144.0	140.0	17.8	125	4
AIL	53.4	53.4	16.9	316	2
BEACONPHAR	326.5	326.5	10.4	32	1
AFCAGRO	23.5	23.5	3.6	151	2
GENNEXT	6.5	6.5	3.3	500	1
CNATEX	10.4	10.4	2.8	272	1
JHRML	125.0	125.0	2.5	20	1
SPCL	85.0	85.0	2.4	29	2
ONEBANKLTD	11.6	11.6	2.4	208	1
DULAMIACOT	72.0	72.0	2.3	33	2
TOSRIFA	24.2	24.2	1.9	79	1
PTL	77.0	77.0	1.5	20	1
MLDYEING	24.8	24.8	1.5	62	2
SQURPHARMA	209.8	209.8	1.0	5	1
Total			1,021.8		88

Important DSE News
BSCCL

The Board of Directors has recommended 46% cash dividend for the year ended June 30, 2022. Date of AGM: 03.12.2022, Time: 11:00 AM, Venue: Digital Platform. Record Date: 07.11.2022. The Company has also reported EPS of Tk. 13.91 (Diluted), NAV per share of Tk. 64.66 and NOCFPS of Tk. 16.76 for the year ended June 30, 2022 as against Tk. 10.61(Diluted), Tk. 52.49 and Tk. 14.18 respectively for the same period of the previous year. EPS has been increased due to increase in Revenue and other income for the ordinary course of business activities.

The Company has informed that the Board of Directors of BSCCL has recently received the 'Submarine Cable Systems and Services License' issued on 19 April, 2022. As the date of commencement of Revenue Sharing is not clear yet, the Board of Directors of BSCCL has approved provisioning for revenue sharing at the rate of 3% of Revenue earned from the services provided under that license for the period 19 April to 30 June 2022. This is informed in continuation of the PSI published as on 24.10.2021.

DESHBANDHU

The Board of Directors has recommended 5% cash dividend for general shareholders only other than Sponsors/Directors for the year ended June 30, 2022. The Sponsors/Directors hold 20,583,388 shares out of total 61,365,150 shares of the Company and the cash dividend to be payable to the General shareholders is Tk. 2,03,90,881.00. Date of AGM: 14.12.2022, Time: 10:00 AM, Venue: Digital Platform. Record date: 15.11.2022. The company has also reported EPS of Tk. 0.47, NAV per share of Tk. 18.21 and NOCFPS of Tk. 0.99 for the year ended June 30, 2022 as against Tk. 0.20, Tk. 18.07 and Tk. 0.53 respectively for the same period of the previous year.

NHFIL

HRC Bangladesh Ltd., one of the Sponsors of the Company, has expressed its intention to sell 20,00,000 shares out of its holding 46,23,604 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within October 31, 2022.

ISLAMICFIN

The Company has informed that Mr. Rezakul Haider, one of the Sponsor Directors of the company passed away on 23.04.2021. His holding 28,36,335 shares will be transmitted among his successors according to the Succession Certificate issued by the Honorable Court.

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	01-Nov-22
Doreen Power Generations and Systems Limited	-	12.0%	18.0%	Record Date	06-Nov-22
Bangladesh Submarine Cable Company Limited	-	0.0%	46.0%	Record Date	07-Nov-22
eGeneration Limited	-	0.0%	10.0%	Record Date	15-Nov-22
Deshbandhu Polymer Limited	-	0.0%	5.0%	Record Date	15-Nov-22

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