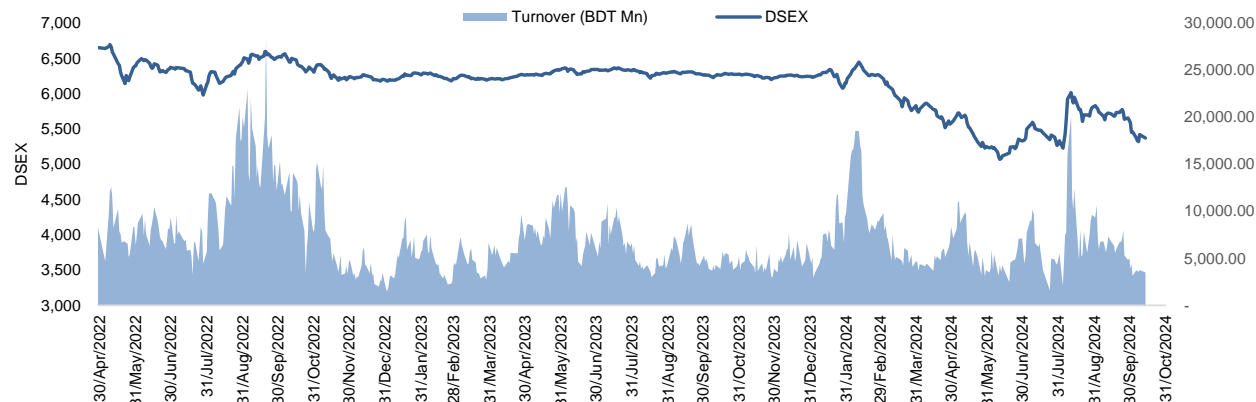


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.89%) lost 48.51 points and closed at 5,373.54. The blue-chip index DS30 (-0.78%), the Shariah-based index DSES (-1.19%), and the large-cap index CDSET (-0.99%) closed at 1,969.52, 1,191.57, and 1,094.54 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 3.53% followed by NBF1 (-2.62%), Bank (-1.53%), Food & Allied (-0.85%), Telecommunication (-0.70%), Pharmaceutical (-0.13%), and Fuel & Power (+0.43%), respectively. Block trades contributed 2.6% of the overall market turnover. Agni Systems Ltd. (-5.6%) was the most traded share with a turnover of BDT 216 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,373.54	5,422.06	-48.51	-0.89%	-14.0%
DS30	1,969.52	1,984.99	-15.47	-0.78%	-5.9%
DSES	1,191.57	1,205.87	-14.29	-1.19%	-12.6%
CDSET	1,094.54	1,105.52	-10.98	-0.99%	-9.0%

	Advanced	Declined	Unchanged	Total
All Category	119	225	52	396
A Category (Equity)	81	119	30	230
B Category (Equity)	20	51	9	80
N Category (Equity)	2	2	0	4
Z Category (Equity)	16	53	13	82
Mutual Funds	15	7	15	37
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,712,106	6,744,166	-0.5%
	Mn USD	55,934	56,201	
Turnover	Mn BDT	3,507	3,766	-6.9%
	Mn USD	29	31	
Volume	Mn Shares	127	134	-5.3%
No. of Trade		127,015	125,917	+0.9%

* Average Interbank Exchange Rate is BDT 120.00 as of Oct 14, 2024

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Figure: Sectorial Turnover (BDT Mn)

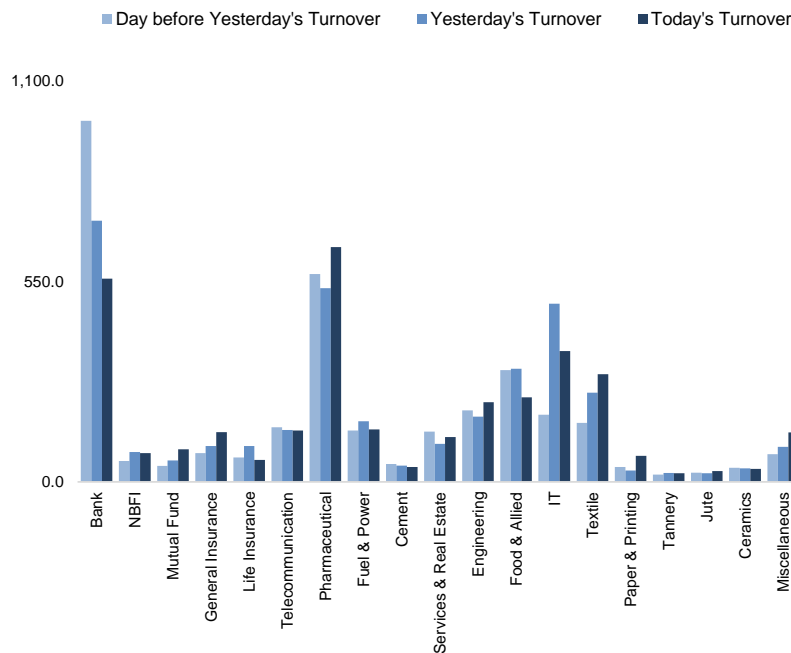
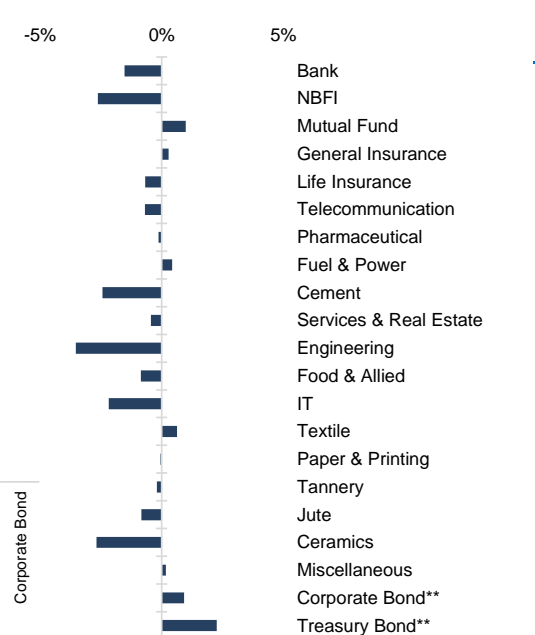


Figure: Sectorial Mcap Change



Market PE 14.8x
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	1,500	1,523	-23.31	-1.53%	36	718,482	10.7%	557.5	16.3%	7.8x	0.7x	GP	453,026	12.2%	102.4	12.8x	6.3x
NBFI	1,215	1,248	-32.71	-2.62%	23	117,621	1.8%	78.9	2.3%	NM	NM	BATBC	204,282	5.5%	31.1	11.6x	3.6x
Mutual Fund	597	591	+5.84	+0.99%	37	27,902	0.4%	89.3	2.6%	NM	0.5x	SQRUPHARMA	201,224	5.4%	27.6	9.9x	1.7x
General Insurance	2,713	2,705	+7.64	+0.28%	43	78,584	1.2%	136.5	4.0%	14.3x	1.2x	WALTONHIL	147,799	4.0%	29.7	10.9x	1.3x
Life Insurance	2,064	2,078	-14.13	-0.68%	15	54,863	0.8%	60.1	1.8%	NM	NM	ROBI	139,853	3.8%	20.7	30.0x	2.2x
Telecommunication	5,297	5,335	-37.09	-0.70%	3	613,360	9.1%	140.5	4.1%	14.8x	4.1x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,001	3,005	-3.90	-0.13%	34	569,398	8.5%	643.8	18.8%	14.7x	1.6x	BRACBANK	91,671	2.5%	112.3	9.4x	1.3x
Fuel & Power	1,156	1,151	+4.89	+0.43%	23	304,407	4.5%	144.2	4.2%	20.0x	0.7x	ISLAMIBANK	86,135	2.3%	55.5	13.2x	1.2x
Cement	2,181	2,235	-54.39	-2.43%	7	104,135	1.6%	40.5	1.2%	16.9x	2.3x	BERGERPBL	81,764	2.2%	0.6	25.3x	5.3x
Services & Real Estate	1,129	1,134	-5.09	-0.45%	9	62,419	0.9%	122.9	3.6%	19.7x	0.4x	RENATA	79,875	2.1%	8.4	22.1x	2.4x
Engineering	2,518	2,610	-92.25	-3.53%	42	290,941	4.3%	218.3	6.4%	12.3x	0.9x	MARICO	71,325	1.9%	11.2	14.3x	7.2x
Food & Allied	17,691	17,843	-152.08	-0.85%	21	324,802	4.8%	231.5	6.8%	17.1x	5.1x	LHB	66,895	1.8%	20.8	14.0x	3.5x
IT	2,355	2,408	-52.59	-2.18%	11	30,986	0.5%	358.5	10.5%	25.6x	2.0x	ICB	53,510	1.4%	6.4	NM	1.3x
Textile	1,138	1,131	+7.18	+0.63%	58	118,094	1.8%	295.6	8.7%	NM	0.8x	UNILEVERCL	50,699	1.4%	0.2	57.1x	23.1x
Paper & Printing	4,721	4,723	-2.33	-0.05%	6	21,659	0.3%	71.5	2.1%	27.5x	0.9x	DUTCHBANGL	45,083	1.2%	1.3	5.9x	0.9x
Tannery	2,086	2,090	-4.13	-0.20%	6	22,846	0.3%	23.4	0.7%	40.7x	1.6x	POWERGRID	35,913	1.0%	2.7	NM	0.2x
Jute	16,690	16,832	-141.37	-0.84%	3	3,911	0.1%	29.5	0.9%	NM	NM	OLYMPIC	34,729	0.9%	57.1	20.8x	3.3x
Ceramics	379	390	-10.46	-2.69%	5	16,837	0.3%	35.7	1.0%	44.9x	1.0x	EBL	34,361	0.9%	9.6	4.9x	0.8x
Miscellaneous	4,123	4,116	+7.15	+0.17%	15	224,665	3.3%	135.8	4.0%	38.0x	1.7x	BXPBARMA	31,629	0.8%	69.2	5.9x	0.7x
Corporate Bond**	9,032	8,950	+82.23	+0.92%	16	34,919	0.5%	1.2	0.0%	NM	NM	CITYBANK	29,636	0.8%	26.3	4.5x	0.8x
Treasury Bond**	409	400	+9.07	+2.27%	236	2,966,955	44.2%	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	
CAPITECGBF	9.9	+10.0%	16.3	NM	1.0x	SQRUPHARMA	117,112	8.6%	9.9x	1.7x	AGNISYSL	38.9	-5.6%	216.2	36.4x	2.4x	
BIFC	10.0	+9.9%	1.9	NM	NM	BEXIMCO	69,460	5.1%	NM	1.2x	TECHNODRUG	48.9	+4.0%	172.6	NM	1.7x	
BDCOM	26.8	+9.8%	22.9	34.8x	1.7x	BATBC	45,948	3.4%	11.6x	3.6x	BRACBANK	51.8	-0.6%	112.3	9.4x	1.3x	
FEKDIL	18.1	+9.7%	75.9	11.6x	0.9x	RENATA	35,002	2.6%	22.1x	2.4x	GP	335.5	-0.8%	102.4	12.8x	6.3x	
IFADAUTOS	23.9	+9.1%	12.1	NM	0.6x	ISLAMIBANK	33,649	2.5%	13.2x	1.2x	ASIATICLAB	35.0	+4.8%	79.4	NM	0.7x	
WMSHIPYARD	7.2	+9.1%	6.6	NM	0.4x	BXPBARMA	32,479	2.4%	5.9x	0.7x	KBPPWBIL	144.0	+1.4%	79.4	NM	12.2x	
CRYSTALINS	50.1	+6.4%	38.8	17.4x	2x	BRACBANK	32,157	2.4%	9.4x	1.3x	FEKDIL	18.1	+9.7%	75.9	11.6x	0.9x	
APEXTANRY	88.4	+6.1%	4.2	NM	1.9x	GP	30,004	2.2%	12.8x	6.3x	BXPBARMA	70.9	-3.3%	69.2	5.9x	0.7x	
SAIHAMCOT	16.2	+5.9%	44.0	17.1x	0.4x	LHB	24,690	1.8%	14.0x	3.5x	IBNSINA	315.9	-4.1%	65.2	14.7x	2.8x	
RUNNERAUTO	21.9	+5.3%	0.1	NM	0.4x	EBL	24,199	1.8%	4.9x	0.8x	LOVELLO	89.0	-0.2%	59.1	64.5x	6.7x	
						PUBALIBANK	20,448	1.5%	3.4x	0.6x							
						NBL	16,930	1.2%	NM	1.5x							
						CITYBANK	16,830	1.2%	4.5x	0.8x							
						BSRMLTD	14,210	1.0%	3.9x	0.5x							
						ALARABANK	13,534	1.0%	9.8x	1.0x							
						PRIMEBANK	12,985	1.0%	4.8x	0.8x							
						OLYMPIC	12,616	0.9%	20.8x	3.3x							
						UTTARABANK	11,350	0.8%	11.1x	0.8x							
						ORIONPHARM	11,317	0.8%	8.4x	0.4x							
						ROBI	10,738	0.8%	30.0x	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)	
RSRMSTEEL	11.0	-9.1%	1.4	NM	0.2x						SQRUPHARMA	232.5	226.2	3.0	67	15.46	
WALTONHIL	487.9	-6.8%	29.7	10.9x	1x						LOVELLO	86.2	85.1	6.0	178	15.21	
TALLUSPIN	5.5	-6.8%	0.2	NM	0.3x						BEXIMCO	104.6	104.1	20.0	125	13.09	
LIBRAINFU	816.4	-6.5%	11.2	NM	1.0x						BANKASIA	16.9	16.9	1.0	561	9.48	
ISLAMIBANK	53.5	-5.8%	55.5	13.2x	1.2x						BXPBARMA	80.6	66.3	2.0	77	5.94	
GHCL	24.8	-5.7%	12.0	NM	0.6x						NBL	5.4	5.4	1.0	1,000	5.40	
AGNISYSL	38.9	-5.6%	216.2	36.4x	2.4x						LHB	63.5	63.5	1.0	50	3.18	
SHYAMPSUG	124.6	-5.5%	2.0	NM	NM						BSCPLC	133.0	133.0	1.0	23	2.99	
KPPL	9.2	-5.2%	1.9	NM	NM						GP	334.0	334.0	1.0	7	2.34	
RINGSHINE	3.8	-5.0%	0.9	NM	NM						BEACHHATCH	81.0	81.0	1.0	25	2.03	

* 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
SQURPHARMA	232.5	226.2	15.5	67	3
LOVELLO	86.2	85.1	15.2	178	6
BEXIMCO	104.6	104.1	13.1	125	20
BANKASIA	16.9	16.9	9.5	561	1
BXPHARMA	80.6	66.3	5.9	77	2
NBL	5.4	5.4	5.4	1,000	1
LHB	63.5	63.5	3.2	50	1
BSCPLC	133.0	133.0	3.0	23	1
GP	334.0	334.0	2.3	7	1
BEACHHATCH	81.0	81.0	2.0	25	1
GPHISPAT	29.0	29.0	1.8	63	1
NLTUBES	74.0	74.0	1.8	25	1
BDTHAI	11.0	11.0	1.8	166	1
AIL	99.2	93.0	1.8	19	2
BNICL	41.0	41.0	1.8	43	1
IBNSINA	335.0	335.0	1.7	5	1
RELIANCE1	19.8	19.8	0.8	41	1
RELIANCE1	19.8	19.8	0.8	41	1
KBPPWBIL	130.4	130.4	0.8	6	1
GRAMEENS2	15.4	15.4	0.8	50	1
ASIATICLAB	36.6	36.6	0.8	21	1
SEAPEARL	49.0	49.0	0.7	14	1
Total			92.0		52

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BANGAS		0.0%	4%	Record Date	29-Oct-24
TALLUSPIN		0.0%	0%	Record Date	29-Oct-24
MITHUNKNIT		0.0%	0%	Record Date	29-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

Important DSE News
WMSHIPYARD

(Q1 Un-audited): EPS was Tk. 0.04 for July-September 2023 as against Tk. 0.03 for July-September 2022; NOCFPS was Tk. 1.03 for July-September 2023 as against Tk. 0.57 for July-September 2022. NAV per share was Tk. 18.31 as on September 30, 2023 and Tk. 20.45 as on September 30, 2022.

SONALIPAPR

The Board of Directors has recommended 40% Cash Dividend for the year ended June 30, 2024. Date of AGM: 19.12.2024, Time: 11:00 AM, Venue: Digital Platform, Record Date: 10.11.2024. The Company has reported EPS of Tk. 3.79, NAV per share of Tk. 164.73 and NOCFPS of Tk. 10.39 for the year ended June 30, 2024 as against Tk. 4.74, Tk. 164.94 and Tk. 7.47 respectively for the year ended June 30, 2023. Previous year's EPS has been adjusted in accordance with IAS 33: Earnings Per Share.

PIONEERINS

(Q3 Un-audited): EPS was Tk. 0.93 for July-September 2024 as against Tk. 0.83 (Restated) for July-September 2023; EPS was Tk. 3.50 for January-September 2024 as against Tk. 3.67 (Restated) for January-September 2023. NOCFPS was Tk. (3.89) for January-September 2024 as against Tk. (4.37) (Restated) for January-September 2023. NAV per share was Tk. 44.19 as on September 30, 2024 and Tk. 43.62 (Restated) as on December 31, 2023. NOCFPS has decreased due to increase in payment of mainly claims.

AIL

Refer to the earlier news disseminated by DSE on 29.05.2022 and 08.06.2023 regarding AIL Convertible Bond worth of BDT 300 crore, the company has further informed that Bangladesh Securities and Exchange Commission (BSEC) through its letter dated October 08, 2024 has cancelled the "AIL Convertible Bond" worth of BDT 300 crore, which was consented vide letter dated May 26, 2022.

CITYBANK

Mr. Rubel Aziz, a Director of the Company, has expressed his intention to sell 34,00,000 shares out of his total holding of 3,08,99,195 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. (DSE) within October 31, 2024.

SIBL

Alhaj Sultan Mahmood Chowdhury, a Sponsor of the Company, has expressed his intention to buy 18,30,261 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within October 31, 2024.

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