

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.10%) lost 58.23 points and closed at 5,257.98. The blue-chip index DS30 (-0.90%), the Shariah-based index DSES (-0.74%), and the large-cap index CDSET (-0.86%) closed at 1,930.40, 1,174.13, and 1,079.76 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 2.02% followed by Bank (-1.33%), Fuel & Power (-1.06%), Food & Allied (-0.87%), Telecommunication (-0.76%), Pharmaceutical (-0.32%), and NBFI (+0.60%), respectively. Block trades contributed 4.1% of the overall market turnover. Agni Systems Ltd. (+1.4%) was the most traded share with a turnover of BDT 228 million.

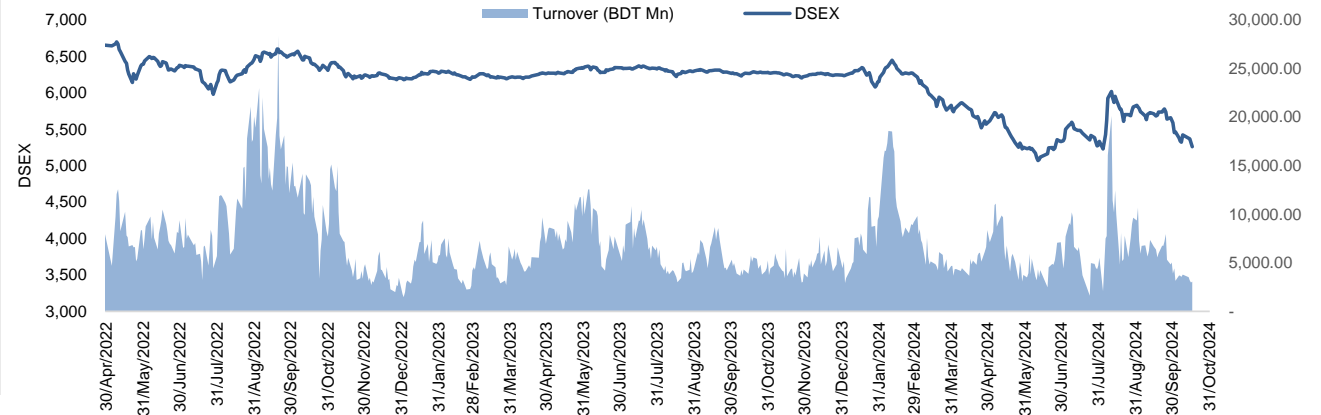
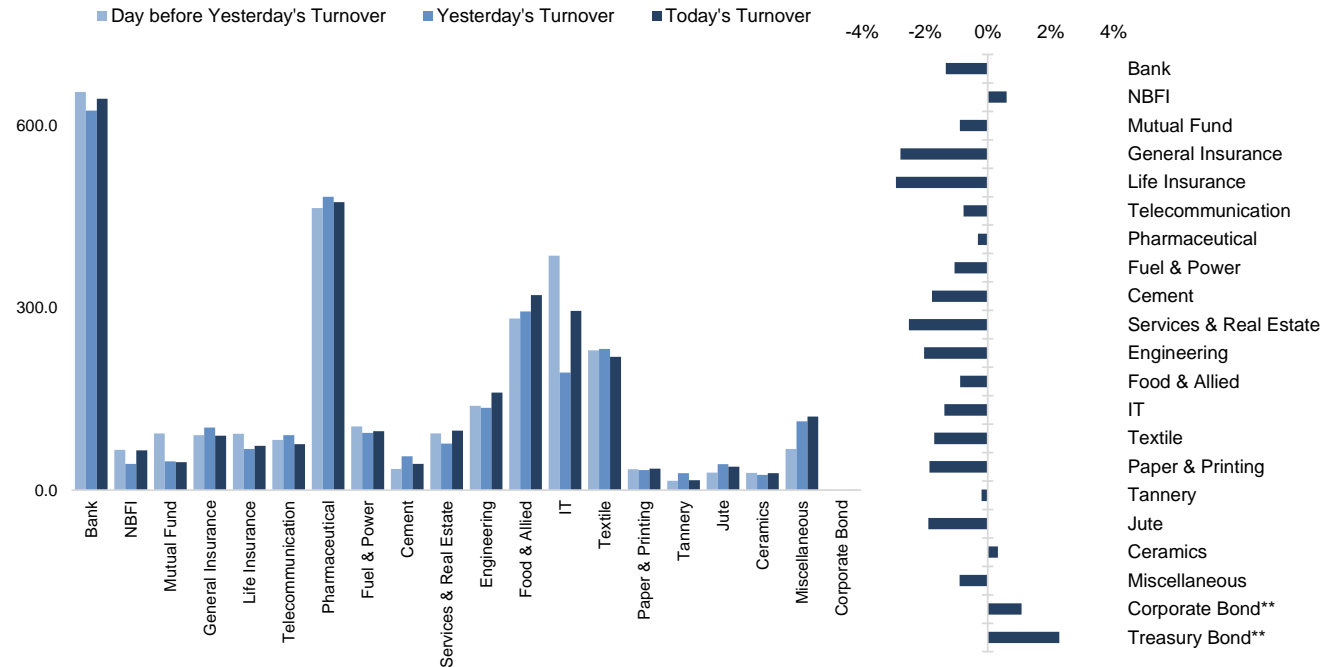


Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,257.98	5,316.21	-58.23	-1.10%	-15.8%
DS30	1,930.40	1,947.98	-17.58	-0.90%	-7.8%
DSES	1,174.13	1,182.88	-8.74	-0.74%	-13.9%
CDSET	1,079.76	1,089.15	-9.39	-0.86%	-10.2%

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



	Advanced	Declined	Unchanged	Total
All Category	53	293	49	395
A Category (Equity)	28	168	32	228
B Category (Equity)	7	69	4	80
N Category (Equity)	0	4	0	4
Z Category (Equity)	18	52	13	83
Mutual Funds	2	16	19	37
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,691,665	6,729,174	-0.6%
	Mn USD	55,764	56,076	
Turnover	Mn BDT	3,069	2,963	+3.6%
	Mn USD	26	25	
Volume	Mn Shares	119	112	+7.1%
	No. of Trade	112,691	108,041	+4.3%

\* Average Interbank Exchange Rate is BDT 120.00 as of Oct 17, 2024

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Market PE 14.4x  
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	1,482	1,502	-20.02	-1.33%	36	709,723	10.7%	644.2	21.9%	7.7x	0.7x	GP	452,351	12.4%	49.9	12.8x	6.3x
NBFI	1,208	1,201	+7.19	+0.60%	23	116,974	1.8%	65.4	2.2%	NM	NM	BATBC	198,936	5.5%	16.8	11.3x	3.5x
Mutual Fund	576	581	-5.16	-0.89%	37	26,888	0.4%	46.1	1.6%	NM	0.5x	SQURPHARMA	198,654	5.4%	63.3	9.8x	1.6x
General Insurance	2,519	2,591	-72.04	-2.78%	43	72,970	1.1%	89.7	3.1%	13.2x	1.1x	WALTONHIL	146,648	4.0%	14.8	10.8x	1.3x
Life Insurance	1,935	1,993	-58.20	-2.92%	15	51,433	0.8%	72.8	2.5%	NM	NM	ROBI	137,234	3.8%	18.6	29.4x	2.2x
Telecommunication	5,261	5,301	-40.54	-0.76%	3	609,126	9.2%	75.6	2.6%	14.7x	4.0x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	2,938	2,947	-9.29	-0.32%	34	557,439	8.4%	474.0	16.1%	14.4x	1.6x	BRACBANK	87,778	2.4%	102.5	9.0x	1.2x
Fuel & Power	1,116	1,128	-11.92	-1.06%	23	293,892	4.4%	97.3	3.3%	17.4x	0.6x	ISLAMIBANK	86,778	2.4%	82.7	13.3x	1.2x
Cement	2,109	2,147	-38.01	-1.77%	7	100,712	1.5%	43.1	1.5%	16.3x	2.2x	BERGERPBL	81,727	2.2%	0.1	25.3x	5.3x
Services & Real Estate	1,069	1,097	-27.53	-2.51%	9	59,119	0.9%	98.1	3.3%	18.6x	0.4x	UPGDCL	76,520	2.1%	2.2	10.2x	2.3x
Engineering	2,459	2,510	-50.69	-2.02%	42	284,095	4.3%	160.4	5.5%	12.0x	0.9x	MARICO	70,815	1.9%	1.3	14.2x	7.1x
Food & Allied	17,315	17,468	-152.45	-0.87%	21	317,901	4.8%	321.2	10.9%	16.7x	4.9x	LHB	65,153	1.8%	28.7	13.7x	3.4x
IT	2,251	2,283	-31.42	-1.38%	11	29,617	0.4%	295.2	10.0%	24.4x	1.9x	ICB	55,331	1.5%	8.3	NM	1.3x
Textile	1,098	1,117	-18.98	-1.70%	58	113,875	1.7%	219.3	7.5%	NM	0.8x	UNILEVERCL	50,649	1.4%	0.6	57.1x	23.1x
Paper & Printing	4,495	4,580	-84.99	-1.86%	6	20,623	0.3%	35.3	1.2%	26.2x	0.9x	DUTCHBANGL	44,205	1.2%	3.1	5.8x	0.9x
Tannery	2,022	2,025	-3.93	-0.19%	6	22,141	0.3%	16.3	0.6%	39.4x	1.6x	OLYMPIC	34,589	0.9%	25.4	20.7x	3.3x
Jute	16,618	16,938	-319.74	-1.89%	3	3,894	0.1%	38.5	1.3%	NM	NM	POWERGRID	34,268	0.9%	2.0	NM	0.2x
Ceramics	373	372	+1.21	+0.33%	5	16,565	0.2%	27.8	0.9%	44.2x	1.0x	EBL	34,225	0.9%	9.5	4.9x	0.8x
Miscellaneous	4,102	4,139	-36.98	-0.89%	15	223,501	3.4%	121.4	4.1%	37.8x	1.7x	BXPHERMA	32,522	0.9%	51.3	6.1x	0.7x
Corporate Bond**	9,277	9,179	+98.47	+1.07%	16	34,901	0.5%	0.2	0.0%	NM	NM	CITYBANK	29,232	0.8%	16.9	4.4x	0.8x
Treasury Bond**	437	427	+9.73	+2.28%	236	2,967,090	44.7%	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
BIFC	11.4	+9.6%	2.5	NM	NM	SQURPHARMA	117,112	8.6%	9.8x	1.6x	AGNISYSL	36.2	+1.4%	228.1	33.8x	2.2x
ADVENT	18.5	+9.5%	24.2	18.7x	1.2x	BEXIMCO	69,460	5.1%	NM	1.2x	LOVELLO	94.2	-2.8%	192.2	68.3x	7.1x
PHARMAID	670.1	+7.5%	29.6	41.2x	6.2x	BATBC	45,948	3.4%	11.3x	3.5x	BRACBANK	49.6	-3.7%	102.5	9.0x	1.2x
SKTRIMS	14.3	+5.9%	3.7	10.8x	0.9x	RENATA	35,002	2.6%	21.0x	2.2x	ISLAMIBANK	53.9	-2.0%	82.7	13.3x	1.2x
MEGHNAPET	24.0	+4.8%	1.0	NM	NM	ISLAMIBANK	33,649	2.5%	13.3x	1.2x	NRBBANK	12.9	-0.8%	72.2	15.6x	1.0x
NCCBLMF1	5.2	+4.00%	0.0	NM	0.6x	BXPHERMA	32,479	2.4%	6.1x	0.7x	TECHNODRUG	45.7	-3.0%	65.3	NM	1.6x
GQBALLPEN	133.6	+3.8%	20.6	NM	1x	BRACBANK	32,157	2.4%	9.0x	1.2x	SQURPHARMA	224.1	-0.4%	63.3	9.8x	1.6x
ICB	63.8	+3.6%	8.3	NM	1.3x	GP	30,004	2.2%	12.8x	6.3x	STANDBANKL	6.9	+3.0%	53.4	4.9x	0.4x
BXPHERMA	72.9	+3.1%	51.3	6.1x	0.7x	LHB	24,690	1.8%	13.7x	3.4x	BSC	63.3	-8.3%	52.3	4.3x	0.7x
STANDBANKL	6.9	+3.0%	53.4	4.9x	0.4x	EBL	24,199	1.8%	4.9x	0.8x	BXPHERMA	72.9	+3.1%	51.3	6.1x	0.7x

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)
SICL	19.8	-9.2%	2.8	NM	0.9x	BEXIMCO	122.3	104.1	27.0	182	19.09
TOSRIFA	20.3	-8.6%	2.7	33.8x	1x	LOVELLO	100.5	90.2	5.0	143	13.95
BSC	63.3	-8.3%	52.3	4.3x	0.7x	SPCL	44.4	44.4	3.0	301	13.36
NORTHRNINS	30.3	-8.2%	0.3	16.3x	1.2x	BANKASIA	16.7	16.7	1.0	800	13.35
AGRANINS	23.5	-7.8%	2.9	12.3x	1.2x	BEACHHATCH	86.5	78.0	2.0	106	8.32
ANLIMAYARN	24.8	-6.8%	1.3	NM	2.6x	MIDLANDBNK	32.9	29.3	5.0	277	8.22
RSRMSTEEL	9.7	-6.7%	0.9	NM	0.2x	NBL	5.4	5.4	1.0	1,400	7.56
TAMIJTEX	118.6	-6.6%	5.0	17.8x	1.3x	CRYSTALINS	44.3	44.3	1.0	165	7.32
METROSPIN	10.1	-6.5%	1.8	NM	0.8x	CENTRALINS	42.0	42.0	1.0	165	6.94
NORTHERN	121.6	-6.4%	0.1	NM	1.5x	PRAGATILIF	238.3	210.0	3.0	20	4.53

\* 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
BEXIMCO	122.3	104.1	19.1	182	27
LOVELLO	100.5	90.2	13.9	143	5
SPCL	44.4	44.4	13.4	301	3
BANKASIA	16.7	16.7	13.4	800	1
BEACHHATCH	86.5	78.0	8.3	106	2
MIDLANDBNK	32.9	29.3	8.2	277	5
NBL	5.4	5.4	7.6	1,400	1
CRYSTALINS	44.3	44.3	7.3	165	1
CENTRALINS	42.0	42.0	6.9	165	1
PRAGATILIF	238.3	210.0	4.5	20	3
AGNISYSL	35.0	34.0	3.9	116	2
RELIANCE1	18.0	18.0	2.3	125	1
JAMUNAOIL	176.0	176.0	1.9	11	3
APSCLBOND	4,288.0	4,288.0	1.7		1
MPETROLEUM	204.0	204.0	1.6	8	2
RECKITTBEN	4,756.0	4,756.0	1.5		1
BRACBANK	54.0	49.3	1.4	27	2
BRACBANK	54.0	49.3	1.4	27	2
EGEN	24.0	24.0	1.2	50	1
LANKABAFIN	18.4	18.4	0.9	50	1
ONEBANKPLC	9.2	9.2	0.9	100	1
APEXTANRY	87.0	87.0	0.9	10	1
<b>Total</b>			<b>127.0</b>		<b>73</b>

**Important DSE News**
**NCCBANK**

Refer to the earlier news disseminated by DSE on 10.08.2022 regarding issuance of NCC Bank Non-Convertible Subordinated Bond-2, the company has further informed that Bangladesh Securities and Exchange Commission (BSEC) vide their letter dated October 09, 2024 informed that the Commission is not in a position to approve the application of the Bank for issuance of 'NCC Bank Non-Convertible Subordinated Bond-2' valuing Tk. 500 (five hundred) crore only. However, the company will appeal to the Commission for further review and consideration for issuing this bond.

**SOUTHEASTB**

Ms. Jusna Ara Kashem, a Sponsor Director of the Company, has expressed her intention to buy 13,00,000 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within October 31, 2024.

**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

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