

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.86%) lost 49.34 points and closed at 5,679.31. The blue-chip index DS30 (-0.67%), the Shariah-based index DSES (-0.60%), and the large-cap index CDSET (-0.36%) closed at 2,100.19, 1,221.38, and 1,129.15 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 2.30% followed by Fuel & Power (-2.19%), Food & Allied (-1.26%), NBFi (-0.99%), Bank (-0.62%), Pharmaceutical (-0.50%), and Telecommunication (-0.24%), respectively. Block trades contributed 3.4% of the overall market turnover. Linde Bangladesh Limited (-2.3%) was the most traded share with a turnover of BDT 321 million.

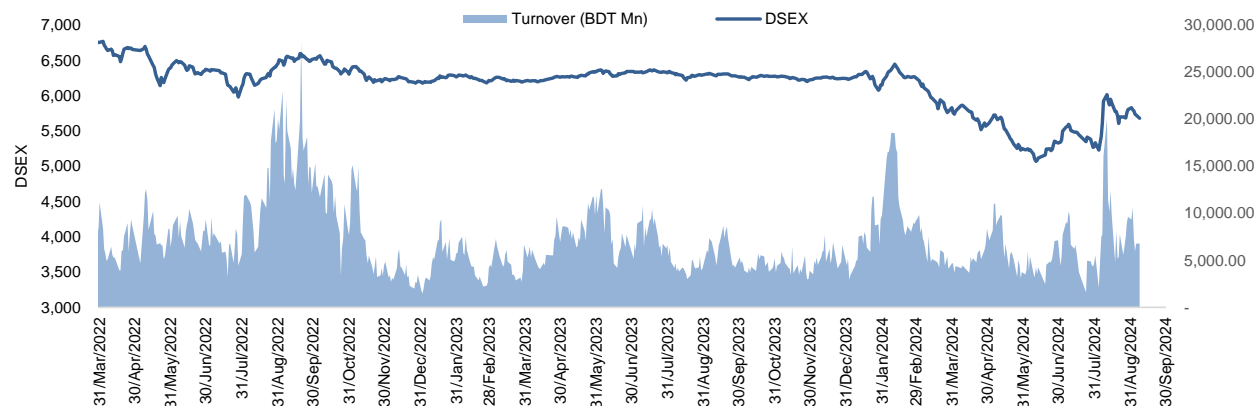


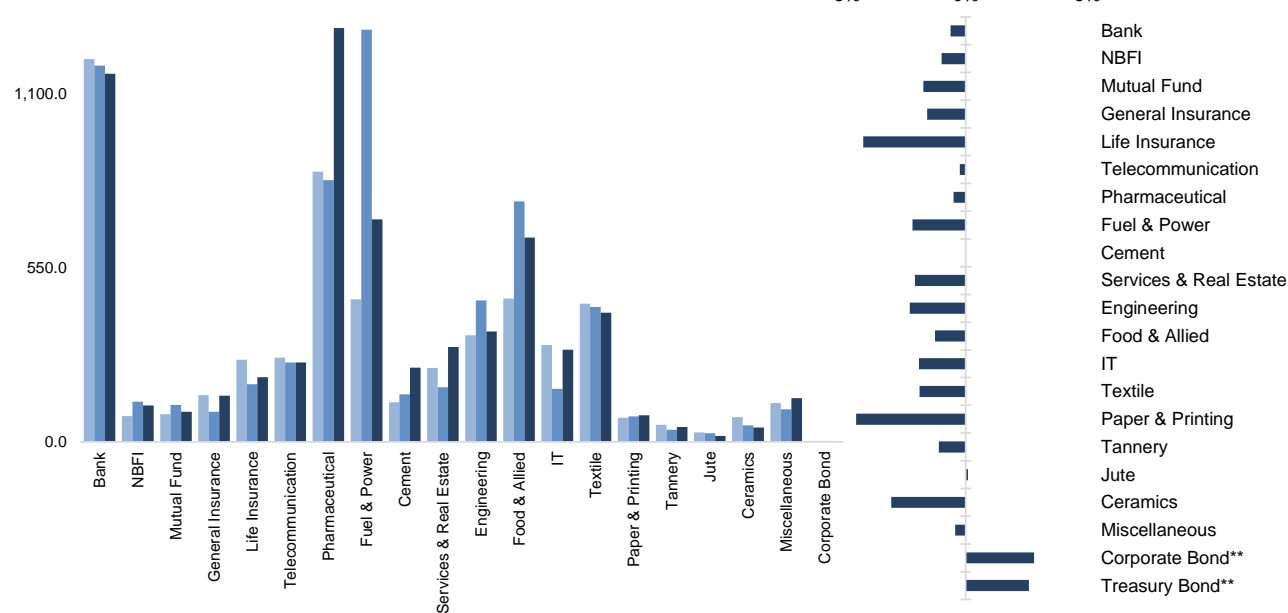
Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,679.31	5,728.65	-49.34	-0.86%	-9.1%
DS30	2,100.19	2,114.36	-14.16	-0.67%	+0.3%
DSES	1,221.38	1,228.81	-7.43	-0.60%	-10.5%
CDSET	1,129.15	1,133.24	-4.09	-0.36%	-6.1%

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

-5%    0%    5%



	Advanced	Declined	Unchanged	Total
All Category	64	289	44	397
A Category (Equity)	38	165	34	237
B Category (Equity)	17	81	4	102
N Category (Equity)	1	2	1	4
Z Category (Equity)	8	41	5	54
Mutual Funds	5	16	15	36
Corporate Bonds	2	0	1	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,946,965	6,924,312	+0.3%
	Mn USD	57,891	57,703	
Turnover	Mn BDT	6,788	6,749	+0.6%
	Mn USD	57	56	
Volume	Mn Shares	189	184	+2.5%
No. of Trade		187,084	180,345	+3.7%

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

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Market PE 15.7x

Market PB 1.3x

\* 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	1,540	1,550	-9.66	-0.62%	36	737,846	10.6%	1,165.2	17.8%	8.0x	0.7x	GP	459,237	11.5%	182.6	13.0x	6.4x
NBFI	1,387	1,401	-13.88	-0.99%	23	134,302	1.9%	115.3	1.8%	NM	NM	BATBC	218,862	5.5%	83.1	12.4x	3.8x
Mutual Fund	662	674	-11.74	-1.74%	37	30,937	0.4%	95.4	1.5%	NM	0.6x	SQRPHARMA	203,086	5.1%	72.0	10.0x	1.7x
General Insurance	3,018	3,066	-48.53	-1.58%	43	87,415	1.3%	146.0	2.2%	15.9x	1.3x	WALTONHIL	198,630	5.0%	25.9	14.6x	1.7x
Life Insurance	2,237	2,335	-98.45	-4.22%	15	59,466	0.9%	204.9	3.1%	NM	NM	ROBI	146,662	3.7%	52.5	31.5x	2.3x
Telecommunication	5,427	5,441	-13.30	-0.24%	3	628,409	9.1%	251.0	3.8%	15.0x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,167	3,183	-15.92	-0.50%	34	600,895	8.7%	1,309.4	20.0%	16.1x	1.7x	BRACBANK	100,343	2.5%	280.3	10.3x	1.4x
Fuel & Power	1,292	1,321	-28.89	-2.19%	23	340,193	4.9%	704.4	10.7%	22.3x	0.7x	RENATA	90,794	2.3%	58.9	39.6x	2.8x
Cement	2,465	2,466	-0.53	-0.02%	7	117,729	1.7%	234.5	3.6%	19.8x	2.6x	UPGDCL	83,418	2.1%	8.0	11.1x	2.5x
Services & Real Estate	1,258	1,285	-26.88	-2.09%	9	69,555	1.0%	300.6	4.6%	21.8x	0.5x	BERGERPBL	82,650	2.1%	7.3	25.6x	5.4x
Engineering	3,157	3,231	-74.42	-2.30%	42	364,688	5.3%	349.4	5.3%	15.0x	1.1x	MARICO	72,658	1.8%	6.3	14.5x	7.3x
Food & Allied	19,260	19,506	-246.28	-1.26%	21	353,601	5.1%	646.7	9.9%	18.6x	5.5x	ISLAMIBANK	64,561	1.6%	24.3	9.9x	0.9x
IT	2,439	2,487	-47.68	-1.92%	11	32,088	0.5%	291.7	4.4%	26.5x	2.1x	ICB	61,749	1.5%	15.6	NM	1.5x
Textile	1,261	1,286	-24.46	-1.90%	58	130,871	1.9%	408.5	6.2%	NM	0.9x	UNILEVERCL	54,068	1.3%	6.9	60.9x	24.7x
Paper & Printing	4,956	5,189	-233.79	-4.51%	6	22,735	0.3%	84.2	1.3%	35.5x	1.0x	DUTCHBANGL	48,774	1.2%	20.8	6.4x	1.0x
Tannery	2,280	2,306	-25.49	-1.11%	6	24,974	0.4%	47.1	0.7%	43.0x	2.3x	OLYMPIC	42,207	1.1%	241.5	25.2x	4.1x
Jute	14,591	14,577	+13.20	+0.09%	3	3,419	0.0%	18.3	0.3%	NM	NM	POWERGRID	37,101	0.9%	12.4	NM	0.2x
Ceramics	459	473	-14.51	-3.07%	5	20,370	0.3%	45.2	0.7%	54.3x	1.2x	EBL	35,855	0.9%	15.0	5.2x	0.9x
Miscellaneous	4,208	4,227	-18.29	-0.43%	15	229,304	3.3%	138.0	2.1%	38.8x	1.8x	BXPHARMA	34,708	0.9%	95.4	6.5x	0.7x
Corporate Bond**	7,058	6,865	+193.36	+2.82%	16	33,579	0.5%	1.3	0.0%	NM	NM	MJLBD	32,309	0.8%	156.1	10.4x	2.2x
Treasury Bond**	350	341	+8.85	+2.60%	237	2,918,965	42.1%	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
NTC	348.3	+8.7%	5.7	NM	NM	SQRPHARMA	117,112	8.6%	10.0x	1.7x	LINDEBD	1,512.2	-2.3%	321.3	40.1x	3.7x
SBACBANK	9.1	+8.3%	17.1	5.8x	0.7x	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	56.7	+0.9%	280.3	10.3x	1.4x
LIBRAINFU	943.4	+7.5%	103.2	NM	1.1x	BATBC	45,948	3.4%	12.4x	3.8x	OLYMPIC	211.1	+1.4%	241.5	25.2x	4.1x
SICL	27.7	+6.1%	20.9	NM	1.3x	RENATA	35,002	2.6%	39.6x	2.8x	IBNSINA	352.6	-0.6%	230.5	16.0x	3.3x
ILFSL	4.6	+4.5%	2.1	NM	NM	ISLAMIBANK	33,649	2.5%	9.9x	0.9x	ACMELAB	90.3	+3.6%	227.5	7.9x	0.8x
AGNISYSL	35.0	+4.5%	201.1	32.7x	2.1x	BXPHARMA	32,479	2.4%	6.5x	0.7x	AGNISYSL	35.0	+4.5%	201.1	32.7x	2.1x
UNITEDINS	37.7	+4.4%	2.8	20.3x	1x	BRACBANK	32,157	2.4%	10.3x	1.4x	GP	340.1	+0.5%	182.6	13.0x	6.4x
AL-HAJTEX	132.8	+4.2%	12.7	NM	14.6x	GP	30,004	2.2%	13.0x	6.4x	MIDLANDBNK	28.4	-0.7%	178.1	15.3x	2.0x
ACMELAB	90.3	+3.6%	227.5	7.9x	0.8x	LHBL	24,690	1.8%	16.0x	3.9x	CONFIDCEM	86.9	+3.5%	167.6	14.7x	1.2x
MONNOAGML	517.4	+3.5%	13.9	NM	3.9x	EBL	24,199	1.8%	5.2x	0.9x	SEAPEARL	46.8	-9.8%	165.0	15.7x	2.4x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.8x						
						CITYBANK	16,830	1.2%	4.8x	0.8x						
						BSRMLTD	14,210	1.0%	4.5x	0.6x						
						ALARABANK	13,534	1.0%	10.4x	1.1x						
						PRIMEBANK	12,985	1.0%	4.6x	0.7x						
						OLYMPIC	12,616	0.9%	25.2x	4.1x						
						UTTARABANK	11,350	0.8%	12.6x	0.8x						
						ORIONPHARM	11,317	0.8%	10.0x	0.5x						
						ROBI	10,738	0.8%	31.5x	2.3x						
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)
RUPALILIFE	107.7	-9.9%	55.3	NM	NM						LOVELLO	85.8	83.0	10.0	716	60.40
INTRACO	24.7	-9.9%	33.9	31.7x	2x						SBACBANK	7.6	7.6	1.0	6,600	50.16
SEAPEARL	46.8	-9.8%	165.0	15.7x	2.4x						MIDLANDBNK	28.0	27.5	5.0	1,000	27.84
SKTRIMS	16.6	-9.8%	10.2	12.6x	1.0x						NTC	292.3	292.3	1.0	66	19.29
SALVOCHEM	32.4	-9.7%	82.0	15.9x	2.0x						UNIQUEHRL	55.5	55.5	1.0	227	12.61
KPPL	12.3	-9.6%	11.5	NM	NM						UPGDCL	155.0	155.0	2.0	50	7.75
TECHNODRUG	40.5	-9.4%	94.0	NM	1.4x						KBPPWBIL	116.3	114.0	2.0	60	6.86
EMERALDOIL	29.4	-9.0%	24.1	22.7x	NM						AL-HAJTEX	130.0	127.0	6.0	40	5.12
GHCL	26.7	-8.9%	20.3	NM	0.6x						BRACBANK	55.9	55.9	2.0	70	3.91
YPL	12.4	-8.8%	5.5	NM	2.3x						AGNISYSL	36.7	32.5	5.0	96	3.32

\* 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
LOVELLO	85.8	83.0	60.4	716	10
SBACBANK	7.6	7.6	50.2	6,600	1
MIDLANDBNK	28.0	27.5	27.8	1,000	5
NTC	292.3	292.3	19.3	66	1
UNIQUEHRL	55.5	55.5	12.6	227	1
UPGDCL	155.0	155.0	7.8	50	2
KBPPWBIL	116.3	114.0	6.9	60	2
AL-HAJTEX	130.0	127.0	5.1	40	6
BRACBANK	55.9	55.9	3.9	70	2
AGNISYSL	36.7	32.5	3.3	96	5
GPHISPAT	33.0	33.0	3.3	100	1
BEXIMCO	125.8	104.1	3.0	27	6
EIL	41.4	41.4	2.9	70	2
VFSTDL	13.1	13.0	2.6	200	2
SHEPHERD	15.3	15.3	2.4	158	1
PRAGATILIF	201.0	176.0	2.2	12	2
ORIONINFU	337.0	337.0	1.9	6	3
ORIONINFU	337.0	337.0	1.9	6	3
GP	368.0	368.0	1.8	5	2
ADNTEL	87.0	87.0	1.7	20	1
NRBBANK	12.3	12.3	1.6	133	1
ASIATICLAB	37.0	37.0	1.1	30	1
<b>Total</b>			<b>230.9</b>		<b>68</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SONARBAINS	0.0%	10%		Record Date	11-Sep-24
LINDEBD	0.0%	4100%		Record Date	25-Sep-24
RUPALILIFE	0.0%	12%		Record Date	26-Sep-24
ILFSL	0.0%	0%		Record Date	26-Sep-24
WALTONHIL	0.0%	350%		Record Date	30-Sep-24

**Important DSE News**

**ILFSL**

The Board of Directors has recommended No Dividend for the year ended December 31, 2023. Date of AGM: 30.09.2024, Time: 10:30 AM, Venue: Hybrid System in combination of both online (virtual/digital platform Link: <https://ilfsl.bdvirtualagm.com>) and physical presence at Sena Convention Hall, SKS Tower, (Lift-9), 7 VIP Road, Mohakhali, Dhaka-1206. Record Date: 26.09.2024. The Company has also reported Consolidated EPS of Tk. (11.07), Consolidated NAV per share of Tk. (173.31) and Consolidated NOCFPS of Tk. (1.27) for the year ended December 31, 2023 as against Tk. (8.05), Tk. (162.24) and NOCFPS of Tk. (1.43) respectively for the year ended December 31, 2022.

**(Q1 Un-audited):** Consolidated EPS was Tk. (1.86) for January-March 2024 as against Tk. (2.15) for January-March 2023. Consolidated NOCFPS was Tk. 0.16 for January-March 2024 as against Tk. 0.21 for January-March 2023. Consolidated NAV per share was Tk. (175.17) as on March 31, 2024 and Tk. (173.31) as on March 31, 2023.

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.34 for April-June 2024 as against Tk. (0.60) for April-June 2023. Consolidated NOCFPS was Tk. 0.13 for January-June 2024 as against Tk. 0.14 for January-June 2023. Consolidated NAV per share was Tk. (181.16) as on June 30, 2024 and Tk. (173.31) as on December 31, 2023. The Company has further informed that Consolidated EPS was Tk. (1.81) for January-June 2024 as against Tk. (2.76) for January-June 2023.

**ENVOYTEX**

The Board of Directors has recommended 20.00% cash dividend for the year ended on 30-Jun-2024. Date of AGM: 02-Nov-2024, Time: 11:00 AM, Venue: Hybrid System. Physical Location: Gulshan Shooting Club, Gulshan Avenue, beside Police Plaza, Dhaka-1212. Record Date: 30-Sep-2024. The Company has also reported EPS of Tk. 3.58, NAV per share of Tk. 51.93 and NOCFPS of Tk. 3.68 for the year ended June 30, 2024 as against Tk. 1.95, Tk. 38.57 and Tk. 6.99 respectively for the year ended June 30, 2023.

The company has informed that the Board of Directors has approved the establishment of a Waste Fabric Recycling Plant at their existing factory premises. This plant will process both local and in-house pre-industrial and post-consumer waste fabrics, converting them into high-quality recycled fiber. The plant is designed to process 12 MT of waste fabrics per day, with a 98% recovery rate of input material into recycled fiber. The total project investment is estimated at BDT 237.04 million, funded through a debt-to-equity ratio of 70:30.

**PROVATIINS**

The Company has informed that the Board of Directors in its meeting held on July 30, 2024 has appointed Mr. Mohammad Mothaher Hossain as the Company Secretary of the company.

**DELTALIFE**

Mr. Monzurur Rahman, a Sponsor of the company, has expressed his intention to transfer a total of 81,000 shares of the company comprising 26,000 shares to his daughter Ms. Saika Rahman (a director of the company), 28,000 shares to his son Mr. Zeyad Rahman (a director of the company) and 27,000 shares to his daughter Ms. Adeeba Rahman (a director of the company) by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 04, 2024.

**SKICL**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Sena Insurance PLC' instead of 'Sena Kalyan Insurance Company Limited' and DSE Trading Code for Sena Insurance PLC will be "SIPLC" instead of "SKICL" with effect from September 09, 2024. Other things (except name and trading code) will remain unchanged.

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