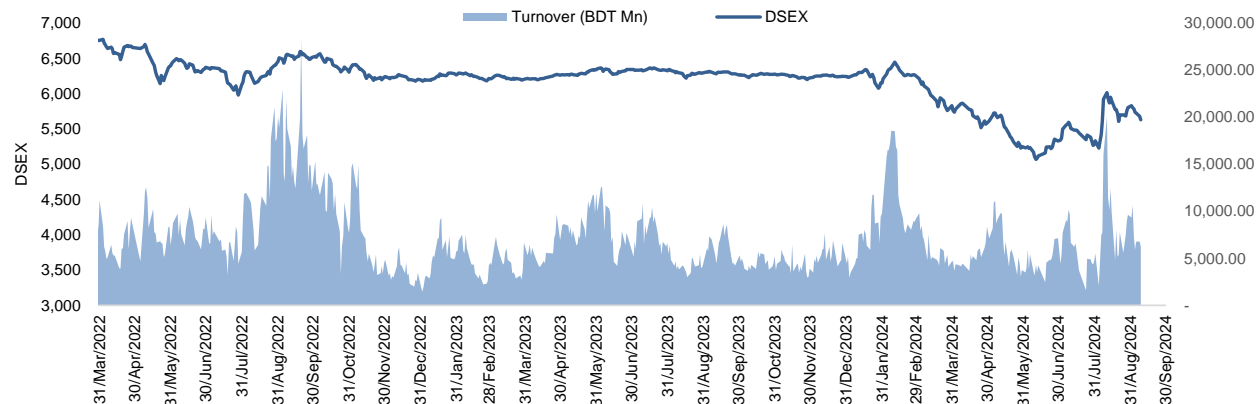


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.88%) lost 49.77 points and closed at 5,629.54. The blue-chip index DS30 (-0.37%), the Shariah-based index DSES (-0.51%), and the large-cap index CDSET (-0.55%) closed at 2,092.52, 1,215.11, and 1,122.92 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.65% followed by Engineering (-1.30%), Food & Allied (-0.92%), NBF1 (-0.73%), Telecommunication (-0.53%), Fuel & Power (-0.45%), and Pharmaceutical (-0.22%), respectively. Block trades contributed 4.2% of the overall market turnover. Linde Bangladesh Limited (-4.7%) was the most traded share with a turnover of BDT 323 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,629.54	5,679.31	-49.77	-0.88%	-9.9%
DS30	2,092.52	2,100.19	-7.67	-0.37%	-0.1%
DSES	1,215.11	1,221.38	-6.27	-0.51%	-10.9%
CDSET	1,122.92	1,129.15	-6.23	-0.55%	-6.6%

	Advanced	Declined	Unchanged	Total
All Category	67	307	25	399
A Category (Equity)	38	188	13	239
B Category (Equity)	16	82	4	102
N Category (Equity)	2	2	0	4
Z Category (Equity)	11	35	8	54
Mutual Funds	3	28	6	37
Corporate Bonds	0	2	1	3
Treasury Bonds	0	2	0	2

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,912,864	6,946,965	-0.5%
	Mn USD	57,607	57,891	
Turnover	Mn BDT	6,214	6,788	-8.5%
	Mn USD	52	57	
Volume	Mn Shares	187	189	-1.0%
	No. of Trade	168,127	187,084	-10.1%

\* Average Interbank Exchange Rate is BDT 120.00 as of Sep 09, 2024

<b>Fahim Hassan</b> Research Analyst (887) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (887) 1708875202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

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

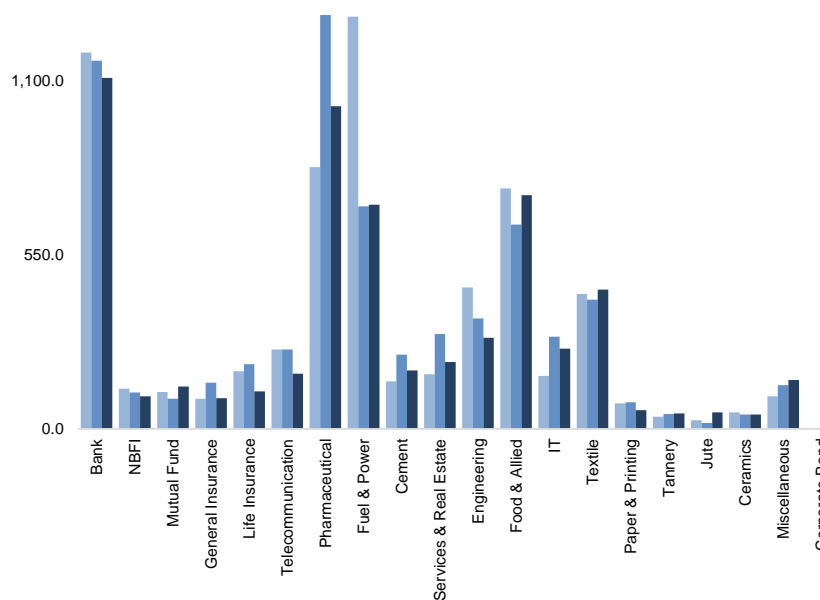
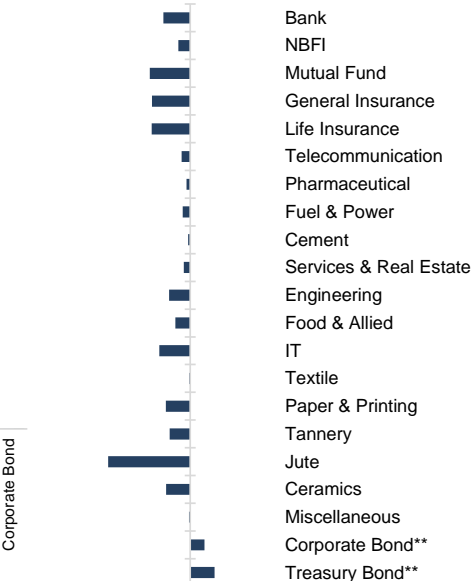


Figure: Sectorial Mcap Change

-10%    -5%    0%    5%



Market PE 15.6x

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	1,515	1,540	-25.41	-1.65%	36	725,672	10.5%	1,110.4	18.6%	7.9x	0.7x	GP	457,347	11.5%	123.2	12.9x	6.4x
NBFI	1,377	1,387	-10.18	-0.73%	23	133,317	1.9%	103.4	1.7%	NM	NM	BATBC	215,784	5.4%	109.1	12.2x	3.8x
Mutual Fund	646	662	-16.56	-2.50%	37	30,163	0.4%	134.0	2.3%	NM	0.6x	SQRUPHARMA	203,618	5.1%	204.1	10.1x	1.7x
General Insurance	2,947	3,018	-70.96	-2.35%	43	85,359	1.2%	96.7	1.6%	15.5x	1.3x	WALTONHIL	196,237	4.9%	26.6	14.5x	1.7x
Life Insurance	2,184	2,237	-53.27	-2.38%	15	58,049	0.8%	118.3	2.0%	NM	NM	ROBI	145,615	3.7%	41.0	31.2x	2.3x
Telecommunication	5,399	5,427	-28.51	-0.53%	3	625,108	9.1%	174.4	2.9%	14.9x	4.1x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,160	3,167	-7.03	-0.22%	34	599,560	8.7%	1,021.0	17.1%	16.0x	1.7x	BRACBANK	99,635	2.5%	170.9	10.2x	1.4x
Fuel & Power	1,286	1,292	-5.88	-0.45%	23	338,646	4.9%	709.5	11.9%	22.2x	0.7x	RENATA	89,704	2.3%	35.4	39.1x	2.8x
Cement	2,462	2,465	-3.26	-0.13%	7	117,574	1.7%	184.7	3.1%	19.8x	2.6x	BERGERPBL	82,715	2.1%	2.8	25.6x	5.4x
Services & Real Estate	1,253	1,258	-5.06	-0.40%	9	69,276	1.0%	211.5	3.6%	21.7x	0.5x	UPGDCL	82,491	2.1%	2.8	11.0x	2.4x
Engineering	3,116	3,157	-40.95	-1.30%	42	359,957	5.2%	288.4	4.8%	14.8x	1.1x	MARICO	72,352	1.8%	1.7	14.5x	7.3x
Food & Allied	19,082	19,260	-177.20	-0.92%	21	350,347	5.1%	739.5	12.4%	18.4x	5.4x	ISLAMIBANK	63,112	1.6%	15.2	9.7x	0.9x
IT	2,393	2,439	-46.37	-1.90%	11	31,478	0.5%	253.4	4.3%	26.0x	2.0x	ICB	62,269	1.6%	11.5	NM	1.5x
Textile	1,261	1,261	-0.68	-0.05%	58	130,801	1.9%	441.0	7.4%	NM	0.9x	UNILEVERCL	53,993	1.4%	5.6	60.8x	24.6x
Paper & Printing	4,881	4,956	-74.41	-1.50%	6	22,394	0.3%	59.2	1.0%	34.9x	1.0x	DUTCHBANGL	47,808	1.2%	8.9	6.3x	1.0x
Tannery	2,251	2,280	-28.86	-1.27%	6	24,658	0.4%	48.9	0.8%	42.5x	2.3x	OLYMPIC	42,447	1.1%	307.7	25.4x	4.1x
Jute	13,852	14,591	-738.71	-5.06%	3	3,246	0.0%	52.0	0.9%	NM	NM	POWERGRID	38,197	1.0%	8.2	NM	0.2x
Ceramics	452	459	-6.86	-1.49%	5	20,066	0.3%	45.5	0.8%	53.5x	1.2x	EBL	35,855	0.9%	8.9	5.2x	0.9x
Miscellaneous	4,205	4,208	-3.04	-0.07%	15	229,138	3.3%	154.9	2.6%	38.8x	1.8x	BXPHARMA	33,057	0.8%	61.2	6.2x	0.7x
Corporate Bond**	7,120	7,058	+61.95	+0.88%	16	33,555	0.5%	2.5	0.0%	NM	NM	MJLBD	32,309	0.8%	211.2	10.4x	2.2x
Treasury Bond**	355	350	+5.26	+1.50%	237	2,918,577	42.3%	5.0	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIRACLEIND	31.0	+9.9%	42.8	NM	2.0x
BEACONPHAR	125.2	+9.9%	49.8	64.2x	4.7x
ENVOYTEX	47.5	+9.2%	23.2	13.3x	0.9x
NTC	378.7	+8.7%	5.9	NM	NM
SHYAMPSUG	159.8	+7.0%	13.7	NM	NM
LIBRAINFU	1,002.7	+6.3%	88.1	NM	1.2x
DESHBANDHU	24.1	+6.2%	14.1	40.8x	1x
NRBBANK	13.9	+6.1%	159.6	16.8x	1.1x
CVOPRL	144.7	+5.9%	24.5	44.1x	14.2x
PHARMAID	726.7	+5.3%	64.6	44.6x	6.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RUPALILIFE	97.0	-9.9%	23.8	NM	NM
SKTRIMS	15.0	-9.6%	1.1	11.4x	1x
UCB	10.6	-8.6%	63.1	4.7x	0.4x
CITYGENINS	63.1	-7.9%	1.7	18.5x	3.0x
COPPERTECH	18.7	-7.0%	12.4	43.5x	1.4x
CONFIDCEM	81.0	-6.8%	101.0	13.7x	1.1x
PRIMETEX	15.7	-6.5%	0.5	NM	0.2x
PEOPLESINS	31.2	-6.0%	2.1	11.9x	0.9x
MITHUNKNIT	15.7	-6.0%	1.4	NM	4.9x
PHOENIXFIN	7.9	-6.0%	2.4	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRUPHARMA	117,112	8.6%	10.1x	1.7x
BEXIMCO	69,460	5.1%	NM	1.2x
BATBC	45,948	3.4%	12.2x	3.8x
RENATA	35,002	2.6%	39.1x	2.8x
ISLAMIBANK	33,649	2.5%	9.7x	0.9x
BXPHARMA	32,479	2.4%	6.2x	0.7x
BRACBANK	32,157	2.4%	10.2x	1.4x
GP	30,004	2.2%	12.9x	6.4x
LHBL	24,690	1.8%	15.9x	3.9x
EBL	24,199	1.8%	5.2x	0.9x
PUBALIBANK	20,448	1.5%	3.5x	0.6x
NBL	16,930	1.2%	NM	1.7x
CITYBANK	16,830	1.2%	4.7x	0.8x
BSRMLTD	14,210	1.0%	4.4x	0.6x
ALARABANK	13,534	1.0%	10.3x	1.1x
PRIMEBANK	12,985	1.0%	4.7x	0.7x
OLYMPIC	12,616	0.9%	25.4x	4.1x
UTTARABANK	11,350	0.8%	12.5x	0.8x
ORIONPHARM	11,317	0.8%	10.1x	0.5x
ROBI	10,738	0.8%	31.2x	2.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LINDEBD	1,440.4	-4.7%	323.3	38.2x	3.5x
OLYMPIC	212.3	+0.6%	307.7	25.4x	4.1x
MJLBD	102.0	-	211.2	10.4x	2.2x
SQRUPHARMA	229.7	+0.3%	204.1	10.1x	1.7x
BRACBANK	56.3	-0.7%	170.9	10.2x	1.4x
AGNISYSL	34.2	-2.3%	165.9	32.0x	2.1x
LOVELLO	86.5	-3.5%	162.9	62.7x	6.5x
NRBBANK	13.9	+6.1%	159.6	16.8x	1.1x
MIDLANDBNK	27.1	-4.6%	140.0	14.6x	1.9x
IBNSINA	349.4	-0.9%	126.5	15.8x	3.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
AIL	100.1	85.8	15.0	904	78.34
SUNLIFEINS	56.0	55.0	7.0	1,098	61.48
LOVELLO	85.0	85.0	3.0	600	51.00
SQRUPHARMA	230.0	230.0	1.0	50	11.50
KBPPWBIL	115.7	115.1	4.0	65	7.49
MIDLANDBNK	26.8	26.7	3.0	260	6.95
IBNSINA	356.0	356.0	3.0	18	6.52
IFIC	10.6	10.6	1.0	500	5.30
BEACHHATCH	82.0	80.5	2.0	56	4.53
MIRACLEIND	30.0	30.0	2.0	100	3.00

\* 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
AIL	100.1	85.8	78.3	904	15
SUNLIFEINS	56.0	55.0	61.5	1,098	7
LOVELLO	85.0	85.0	51.0	600	3
SQRPHARMA	230.0	230.0	11.5	50	1
KBPPWBIL	115.7	115.1	7.5	65	4
MIDLANDBNK	26.8	26.7	6.9	260	3
IBNSINA	356.0	356.0	6.5	18	3
IFIC	10.6	10.6	5.3	500	1
BEACHHATCH	82.0	80.5	4.5	56	2
MIRACLEIND	30.0	30.0	3.0	100	2
RUPALILIFE	117.0	117.0	3.0	26	1
BEXIMCO	110.0	104.1	2.8	26	5
DELTALIFE	100.0	99.8	2.0	21	2
SPCL	62.2	58.5	1.9	31	2
TOSRIFA	26.2	25.4	1.7	64	2
BATBC	369.9	369.9	1.3	4	1
LINDEBD	1,510.0	1,510.0	1.2	1	1
LINDEBD	1,510.0	1,510.0	1.2	1	1
CITYBANK	24.0	24.0	1.2	50	1
BRACBANK	54.0	54.0	1.2	22	1
CITYGENINS	75.0	75.0	1.2	16	1
PREMIERCEM	63.8	63.8	1.0	15	1
<b>Total</b>			<b>259.4</b>		<b>66</b>

**Important DSE News**

**LOVELLO**

The company has informed that the Board of Directors of the company has recently approved a proposal for investing approximately BDT 150 crore for setting up the 2nd unit of the ice cream plant. In preparation for this, the company has already bought 59.16 decimal lands adjacent to the existing unit at Village: Bashile, PO: Kathali, Valuka, Mymensingh. The company is going to sign a contract with (i) Tetra Pak South East Asia Pte Ltd. 19 GUL LANE, Singapore, Singapore 629414, (ii) MEC Group (Equipmentimes), No.25, Tongxing Street, Dalian, China, (iii) Teknoice, Via Lazio 37-20090, Buccinasco (Mi), Italy, and (iv) Yantai Moon Co. Ltd. Yantai City, Shandong Province, China for procuring major capital machinery for the proposed 2nd unit of the ice cream manufacturing plant. After the commission and installation of the 2nd unit, the production capacity of ice cream will increase to 2,50,000 liters per day which is more than double than the existing production capacity. The new product of the 2nd unit will be available in the market from June of 2025. The investment will be arranged from internal sources and also through bank finances.

**RELIANCE1**

The fund manager has requested the concerned brokerage house/DPs to provide a statement of the margin loan holders who hold units of Reliance One, the first Scheme of Reliance Insurance Mutual Fund on the record date (15 September 2024) on or before 23 September 2024, and a soft copy will send to the email address: hello@aims-bangladesh.com. Any information provided after 23 September 2024 will not be considered. The statement should include unitholder's name, BO ID number, client-wise unitholders, position gross dividend receivable, applicable tax rate, net dividend receivable, bank account number, routing number, contact person etc. Unitholder(s) are also required to furnish 12 digit Taxpayer's Identification Number (TIN) for deduction of Tax @10%. Those who would not provide the 12 digit TIN will be deducted Tax @15%. Therefore, unitholder(s) are requested to submit/update their 12 digit TIN to the office of their respective broker houses before September 15, 2024.

**NATLIFEINS**

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'National Life Insurance PLC' instead of 'National Life Insurance Company Limited' with effect from September 10, 2024. Other things (except name) will remain unchanged.

**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

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