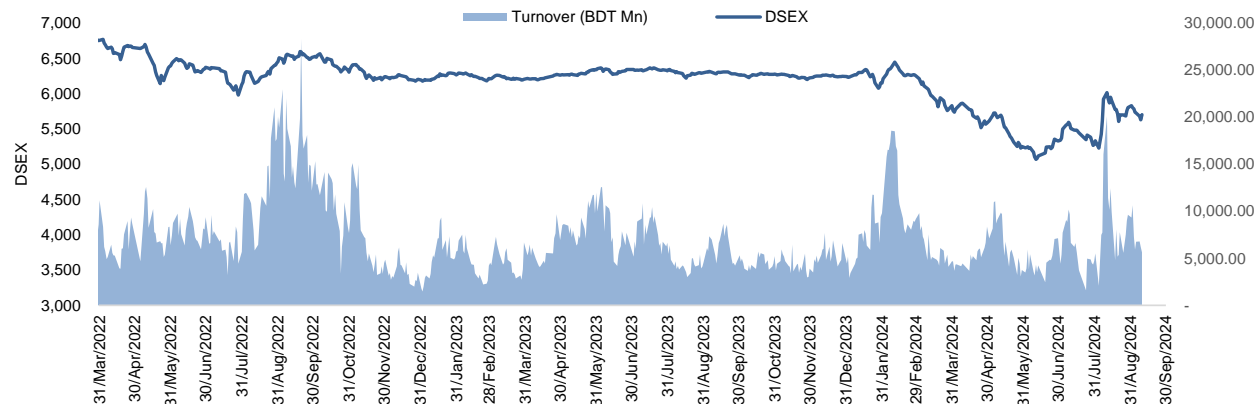


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.30%) gained 73.29 points and closed at 5,702.83. The blue-chip index DS30 (+1.06%), the Shariah-based index DSES (+1.67%), and the large-cap index CDSET (+1.21%) closed at 2,114.74, 1,235.35, and 1,136.51 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 1.48% followed by Bank (+1.35%), Telecommunication (+0.93%), Engineering (+0.88%), Fuel & Power (+0.81%), Food & Allied (+0.03%), and NBFI (-0.24%), respectively. Block trades contributed 6.9% of the overall market turnover. Olympic Industries Ltd. (0.0%) was the most traded share with a turnover of BDT 324 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,702.83	5,629.54	+73.29	+1.30%	-8.7%
DS30	2,114.74	2,092.52	+22.22	+1.06%	+1.0%
DSES	1,235.35	1,215.11	+20.25	+1.67%	-9.4%
CDSET	1,136.51	1,122.92	+13.59	+1.21%	-5.5%

	Advanced	Declined	Unchanged	Total
All Category	273	76	47	396
A Category (Equity)	165	44	27	236
B Category (Equity)	79	12	11	102
N Category (Equity)	3	0	1	4
Z Category (Equity)	26	20	8	54
Mutual Funds	15	6	14	35
Corporate Bonds	1	1	0	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,947,386	6,912,864	+0.5%
	Mn USD	57,895	57,607	
Turnover	Mn BDT	5,627	6,214	-9.4%
	Mn USD	47	52	
Volume	Mn Shares	147	187	-21.2%
No. of Trade		157,600	168,127	-6.3%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 10, 2024

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Figure: Sectorial Turnover (BDT Mn)

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

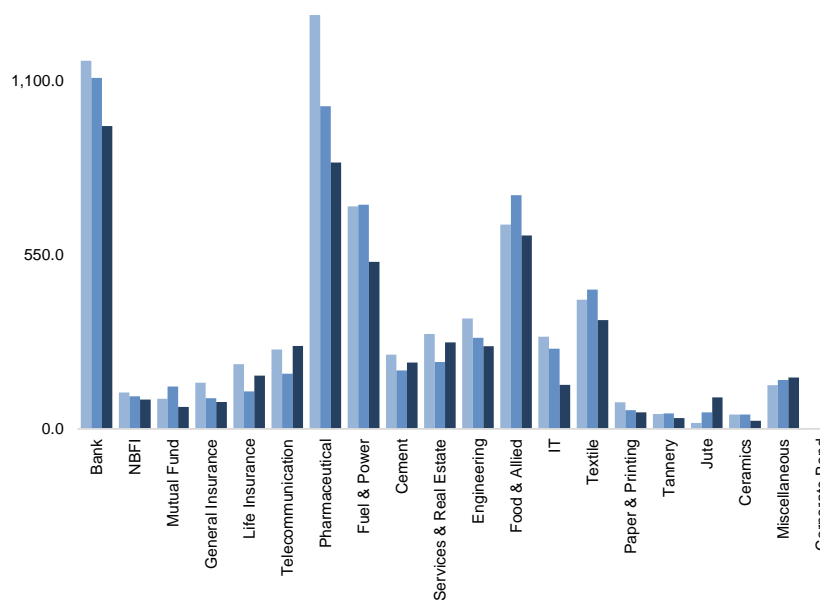
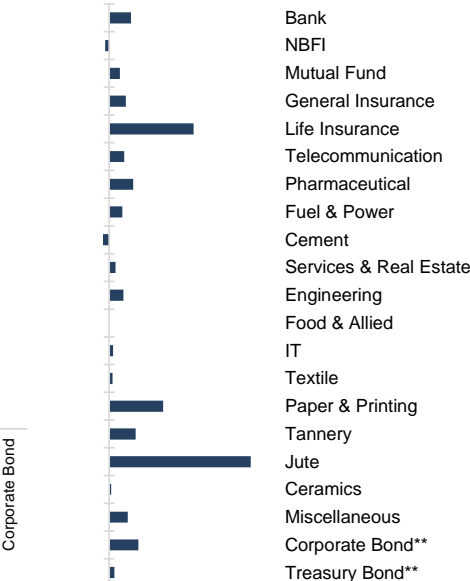


Figure: Sectorial Mcap Change

-5% | 0% | 5% | 10%



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	1,535	1,515	+20.43	+1.35%	36	735,456	10.6%	958.2	18.3%	8.0x	0.7x	GP	458,832	11.4%	144.6	13.0x	6.4x
NBFI	1,374	1,377	-3.31	-0.24%	23	132,997	1.9%	92.4	1.8%	NM	NM	BATBC	216,540	5.4%	46.6	12.3x	3.8x
Mutual Fund	650	646	+4.23	+0.65%	37	30,361	0.4%	69.8	1.3%	NM	0.6x	SQURPHARMA	204,682	5.1%	58.4	10.1x	1.7x
General Insurance	2,977	2,947	+30.55	+1.04%	43	86,244	1.2%	84.7	1.6%	15.7x	1.3x	WALTONHIL	197,479	4.9%	18.9	14.6x	1.7x
Life Insurance	2,297	2,184	+113.72	+5.21%	15	61,073	0.9%	168.7	3.2%	NM	NM	ROBI	147,710	3.7%	46.3	31.7x	2.3x
Telecommunication	5,449	5,399	+50.01	+0.93%	3	630,898	9.1%	262.2	5.0%	15.0x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,207	3,160	+46.63	+1.48%	34	608,407	8.8%	843.2	16.1%	16.3x	1.8x	BRACBANK	99,812	2.5%	217.3	10.2x	1.4x
Fuel & Power	1,297	1,286	+10.46	+0.81%	23	341,398	4.9%	528.3	10.1%	22.4x	0.7x	RENATA	90,381	2.3%	12.4	39.4x	2.8x
Cement	2,452	2,462	-9.49	-0.39%	7	117,120	1.7%	210.3	4.0%	19.0x	2.6x	BERGERPBL	83,420	2.1%	2.3	25.8x	5.4x
Services & Real Estate	1,258	1,253	+4.98	+0.40%	9	69,551	1.0%	273.8	5.2%	22.6x	0.5x	UPGDCL	83,360	2.1%	4.0	11.1x	2.5x
Engineering	3,143	3,116	+27.43	+0.88%	42	363,127	5.2%	261.2	5.0%	14.9x	1.1x	MARICO	73,127	1.8%	9.4	14.6x	7.4x
Food & Allied	19,087	19,082	+5.01	+0.03%	21	350,440	5.0%	612.3	11.7%	18.4x	5.4x	ISLAMIBANK	67,620	1.7%	60.9	10.4x	0.9x
IT	2,398	2,393	+5.85	+0.24%	11	31,555	0.5%	139.1	2.7%	26.0x	2.0x	ICB	61,228	1.5%	8.3	NM	1.4x
Textile	1,263	1,261	+2.63	+0.21%	58	131,073	1.9%	344.2	6.6%	NM	0.9x	UNILEVERCL	53,145	1.3%	1.9	59.9x	24.3x
Paper & Printing	5,044	4,881	+162.42	+3.33%	6	23,139	0.3%	52.6	1.0%	36.1x	1.0x	DUTCHBANGL	49,038	1.2%	32.0	6.4x	1.0x
Tannery	2,288	2,251	+36.66	+1.63%	6	25,059	0.4%	33.9	0.6%	43.2x	2.4x	OLYMPIC	42,447	1.1%	323.6	25.4x	4.1x
Jute	15,062	13,852	+1210.52	+8.74%	3	3,530	0.1%	99.9	1.9%	NM	NM	POWERGRID	38,289	1.0%	10.4	NM	0.2x
Ceramics	452	452	+0.52	+0.12%	5	20,089	0.3%	25.4	0.5%	53.6x	1.2x	EBL	35,991	0.9%	6.1	5.2x	0.9x
Miscellaneous	4,254	4,205	+48.31	+1.15%	15	231,771	3.3%	162.5	3.1%	39.2x	1.8x	BXPHARMA	33,414	0.8%	34.9	6.3x	0.7x
Corporate Bond**	7,248	7,120	+128.08	+1.80%	16	33,836	0.5%	2.2	0.0%	NM	NM	MJLBD	32,277	0.8%	60.3	10.4x	2.2x
Treasury Bond**	356	355	+1.16	+0.33%	237	2,914,352	42.0%	14.0	0.3%	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
NATLIFEINS	144.3	+10.0%	24.2	NM	NM	SQURPHARMA	117,112	8.6%	10.1x	1.7x	OLYMPIC	212.3	-	323.6	25.4x	4.1x
BSCPLC	147.7	+10.0%	71.3	12.6x	1.6x	BEXIMCO	69,460	5.1%	NM	1.2x	LINDEBD	1,468.4	+1.9%	314.0	39.0x	3.6x
NORTHERN	129.2	+10.0%	0.5	NM	1.6x	BATBC	45,948	3.4%	12.3x	3.8x	BRACBANK	56.4	+0.2%	217.3	10.2x	1.4x
KBPPWBIL	142.6	+9.9%	28.3	NM	12.1x	RENATA	35,002	2.6%	39.4x	2.8x	GP	339.8	+0.3%	144.6	13.0x	6.4x
KPPL	13.3	+9.9%	9.5	NM	NM	ISLAMIBANK	33,649	2.5%	10.4x	0.9x	NRBBANK	13.4	-3.6%	140.4	16.2x	1.1x
RUPALILIFE	106.4	+9.7%	51.3	NM	NM	BXPHARMA	32,479	2.4%	6.3x	0.7x	CONFIDCEM	73.2	-9.6%	139.8	8.4x	1.0x
BEACONPHAR	137.3	+9.7%	76.1	70.4x	5x	BRACBANK	32,157	2.4%	10.2x	1.4x	IFIC	10.3	+4.0%	111.7	7.8x	0.5x
GHCL	28.5	+9.6%	15.2	NM	0.7x	GP	30,004	2.2%	13.0x	6.4x	SONALIANS	265.6	+8.7%	99.3	30.9x	4.0x
YPL	12.8	+9.4%	4.4	NM	2.4x	LHBL	24,690	1.8%	15.9x	3.9x	LIBRAINFU	1,034.1	+3.1%	90.7	NM	1.2x
COPPERTECH	20.4	+9.1%	9.7	47.4x	1.5x	EBL	24,199	1.8%	5.2x	0.9x	IBNSINA	353.4	+1.1%	84.5	16.0x	3.3x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.7x						
						CITYBANK	16,830	1.2%	4.8x	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%	4.8x	0.8x						
						OLYMPIC	12,616	0.9%	25.4x	4.1x						
						UTTARABANK	11,350	0.8%	12.0x	0.8x						
						ORIONPHARM	11,317	0.8%	10.6x	0.5x						
						ROBI	10,738	0.8%	31.7x	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)
NEWLINE	31.5	-10.0%	0.8	60.6x	1.3x						LOVELLO	94.6	85.0	7.0	1,720	147.59
CONFIDCEM	73.2	-9.6%	139.8	8.4x	1x						ORIONINFU	301.0	295.4	6.0	212	62.63
HAMI	112.3	-8.3%	1.9	NM	12.3x						AIL	104.0	85.5	8.0	588	51.76
LOVELLO	79.7	-7.9%	74.0	57.8x	6.0x						EIL	50.1	44.0	7.0	734	36.51
PREMIERLEA	4.2	-6.7%	0.1	NM	NM						KBPPWBIL	136.0	117.0	9.0	290	36.49
EHL	72.3	-5.5%	44.9	12.0x	0.9x						PRAGATILIF	186.0	185.0	6.0	43	8.04
MERCINS	29.9	-5.1%	0.5	39.9x	1.5x						BEXIMCO	125.8	104.1	14.0	70	7.44
SHYAMPUSUG	151.8	-5.0%	5.0	NM	NM						CENTRALINS	40.5	40.5	2.0	98	3.97
FAREASTFIN	4.1	-4.7%	0.8	NM	NM						KOHINOOR	560.0	550.0	2.0	7	3.88
ILFSL	4.4	-4.3%	0.5	NM	NM						SUNLIFEINS	57.0	56.0	2.0	59	3.33

* 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	94.6	85.0	147.6	1,720	7
ORIONINFU	301.0	295.4	62.6	212	6
AIL	104.0	85.5	51.8	588	8
EIL	50.1	44.0	36.5	734	7
KBPPWBIL	136.0	117.0	36.5	290	9
PRAGATILIF	186.0	185.0	8.0	43	6
BEXIMCO	125.8	104.1	7.4	70	14
CENTRALINS	40.5	40.5	4.0	98	2
KOHINOOR	560.0	550.0	3.9	7	2
SUNLIFEINS	57.0	56.0	3.3	59	2
GPHISPAT	33.3	33.3	3.3	100	1
MALEKSPIN	33.5	30.5	2.9	90	2
MIDLANDBNK	27.0	27.0	2.7	100	1
CONFIDCEM	91.0	81.0	2.6	31	2
ASIATICLAB	36.1	36.1	2.3	65	1
POWERGRID	45.2	45.2	2.3	50	1
BEACHHATCH	81.5	81.5	1.6	20	2
BEACHHATCH	81.5	81.5	1.6	20	2
SONARGAON	21.4	21.4	1.5	72	1
AFCAGRO	12.0	12.0	0.9	79	1
BBSCABLES	26.1	26.1	0.8	31	1
AGNISYSL	33.1	33.1	0.6	19	1
Total			388.3		85

Important DSE News

EHL

The Board of Directors has recommended 19% Cash Dividend for the year ended June 30, 2024. Date of AGM: 30.10.2024, Time: 10:30 AM, Venue: Digital Platform through the link: <https://ehl.bdvirtualagm.com>. Record Date: 03.10.2024. The Company has reported EPS of Tk. 6.04, NAV per share of Tk. 83.62 and NOCFPS of Tk. (10.42) for the year ended June 30, 2024 as against Tk. 7.37, Tk. 80.08 and Tk. 20.56 respectively for the year ended June 30, 2023.

CONFIDCEM

The Board of Directors has recommended 10% cash dividend the year ended June 30, 2024. Date of AGM: 23.10.2024, Time: 11:00 AM, Venue: Digital Platform, Record Date: 30.09.2024. The Company has reported Consolidated EPS of Tk. 8.73, Consolidated NAV per share of Tk. 74.75 and Consolidated NOCFPS of Tk. (2.78) for the year ended June 30, 2024 as against Tk. 3.15 (restated), Tk. 69.89 (restated) and Tk. (5.31) (restated) respectively for the year ended June 30, 2023.

The Board of Directors recommended to raise the Paid-up Capital through issuance of Rights Share at a ratio of 3 : 1 (R) Share i.e. 1 (One) Right Share against 3 (Three) ordinary shares held at record date at an Issue Price of Tk. 45 (including Tk. 35 Premium) for each Right Share, subject to approval of the Shareholders in the Annual General Meeting (AGM), Bangladesh Securities and Exchange Commission (BSEC) and complying with the requirements embodied in relevant laws and Regulatory Authorities concerned. The purpose of the Rights Issue is for investment in associate company, Confidence Cement Dhaka Limited and for Term-Loan repayments. The shareholders will be notified of the separate record date for the Rights entitlement after approval from the BSEC.

The Board of Directors has decided to dispose the business of Ready-mix Concrete (RMC) Plant (24,00,000 CFT capacity per annum) located at Sea-Beach Road, South Patenga, Chattogram subject to approval of the Shareholders in the general meeting due to disruption in raw materials import for crisis of foreign currency (dollar), prevailing stagnation in domestic infrastructure development and newly imposed of VAT on Ready-mix business has led to price hikes and shrinking demand significantly.

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
ENVOYTEX		0.0%	20%	Record Date	30-Sep-24
CONFIDCEM		0.0%	10%	Record Date	30-Sep-24
GLOBALINS		0.0%	10%	Record Date	1-Oct-24
EHL		0.0%	19%	Record Date	3-Oct-24
PRIMELIFE		0.0%	1%	Record Date	9-Oct-24

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