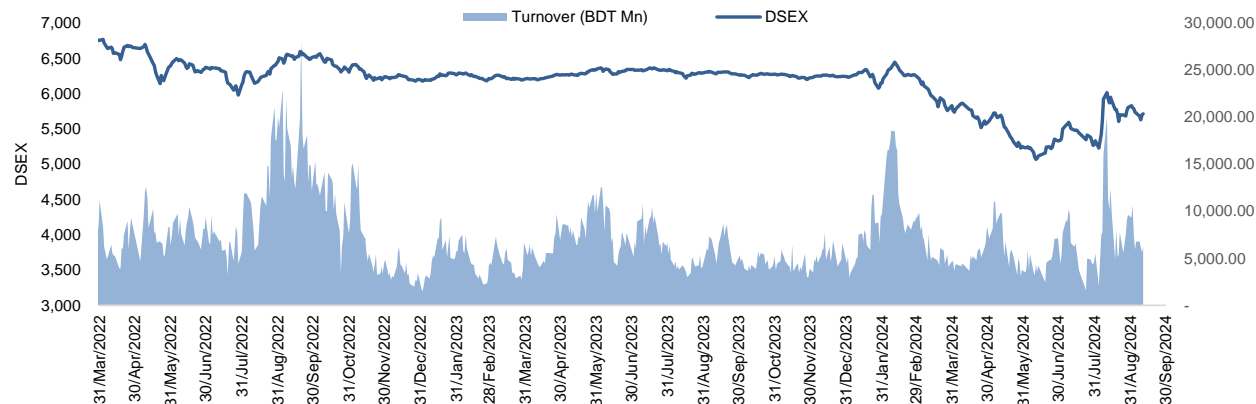


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.20%) gained 11.13 points and closed at 5,713.96. The blue-chip index DS30 (-0.33%), the Shariah-based index DSES (+0.45%), and the large-cap index CDSET (+0.02%) closed at 2,107.81, 1,240.92, and 1,136.75 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.39% followed by Engineering (-1.02%), Food & Allied (-0.59%), Fuel & Power (-0.47%), Telecommunication (-0.33%), Pharmaceutical (+0.14%), and Bank (+0.23%), respectively. Block trades contributed 5.8% of the overall market turnover. Agni Systems Ltd. (+2.6%) was the most traded share with a turnover of BDT 320 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,713.96	5,702.83	+11.13	+0.20%	-8.5%
DS30	2,107.81	2,114.74	-6.93	-0.33%	+0.7%
DSES	1,240.92	1,235.35	+5.57	+0.45%	-9.0%
CDSET	1,136.75	1,136.51	+0.24	+0.02%	-5.5%

	Advanced	Declined	Unchanged	Total
All Category	163	172	62	397
A Category (Equity)	104	104	29	237
B Category (Equity)	35	46	21	102
N Category (Equity)	2	2	0	4
Z Category (Equity)	22	20	12	54
Mutual Funds	16	8	13	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,930,579	6,947,386	-0.2%
	Mn USD	57,755	57,895	
Turnover	Mn BDT	6,252	5,627	+11.1%
	Mn USD	52	47	
Volume	Mn Shares	181	147	+23.1%
No. of Trade		169,918	157,600	+7.8%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 11, 2024

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Figure: Sectorial Turnover (BDT Mn)

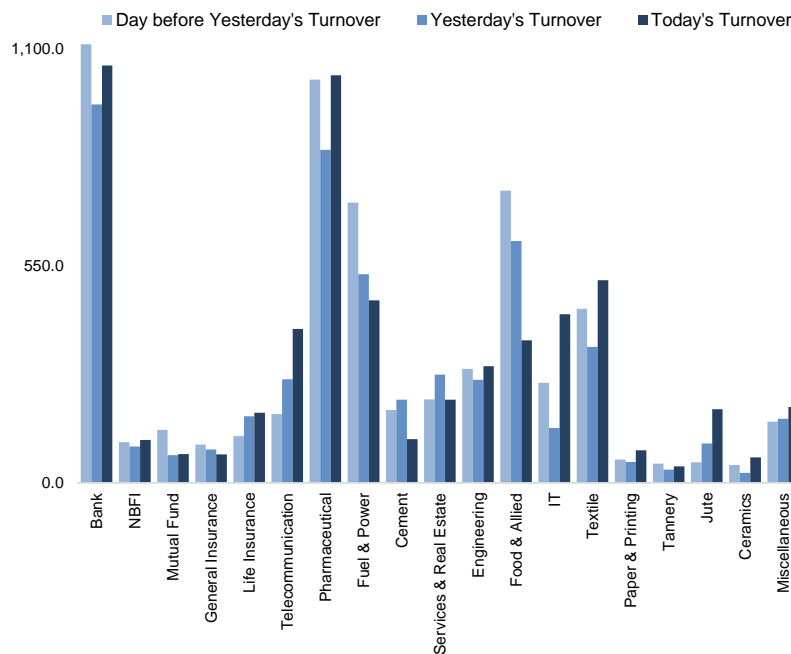
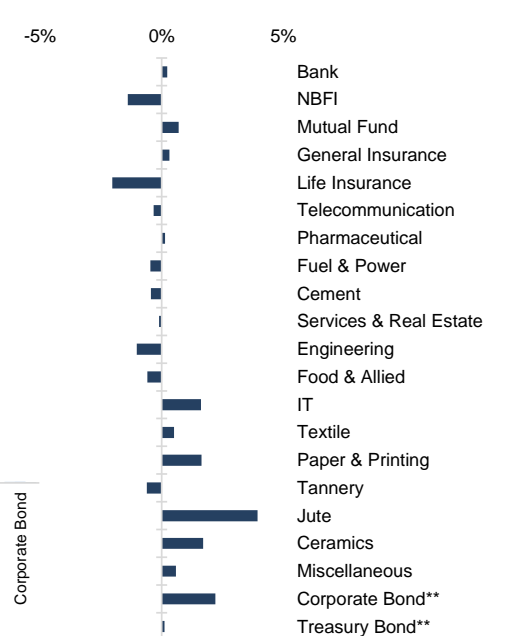


Figure: Sectorial Mcap Change



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	1,539	1,535	+3.48	+0.23%	36	737,123	10.6%	1,056.5	17.9%	8.0x	0.7x	GP	454,241	11.3%	146.9	12.9x	6.3x
NBFI	1,355	1,374	-19.15	-1.39%	23	131,143	1.9%	108.6	1.8%	NM	NM	BATBC	215,892	5.4%	37.6	12.2x	3.8x
Mutual Fund	654	650	+4.55	+0.70%	37	30,573	0.4%	72.5	1.2%	NM	0.6x	SQRPHARMA	204,947	5.1%	56.5	10.1x	1.7x
General Insurance	2,987	2,977	+9.31	+0.31%	43	86,514	1.2%	72.0	1.2%	15.7x	1.3x	WALTONHIL	194,541	4.9%	22.7	14.3x	1.7x
Life Insurance	2,251	2,297	-46.67	-2.03%	15	59,832	0.9%	177.5	3.0%	NM	NM	ROBI	148,234	3.7%	40.3	31.8x	2.3x
Telecommunication	5,431	5,449	-18.04	-0.33%	3	628,810	9.1%	389.7	6.6%	15.0x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,211	3,207	+4.43	+0.14%	34	609,248	8.8%	1,031.5	17.5%	16.3x	1.8x	BRACBANK	99,104	2.5%	126.4	10.2x	1.4x
Fuel & Power	1,291	1,297	-6.06	-0.47%	23	339,803	4.9%	462.2	7.9%	22.3x	0.7x	RENATA	90,427	2.3%	18.2	39.4x	2.8x
Cement	2,442	2,452	-10.82	-0.44%	7	116,604	1.7%	110.5	1.9%	18.9x	2.6x	UPGDCL	83,882	2.1%	2.6	11.2x	2.5x
Services & Real Estate	1,257	1,258	-1.37	-0.11%	9	69,475	1.0%	210.6	3.6%	22.6x	0.5x	BERGERPBL	83,387	2.1%	1.3	25.8x	5.4x
Engineering	3,111	3,143	-32.18	-1.02%	42	359,409	5.2%	295.3	5.0%	14.8x	1.1x	MARICO	72,412	1.8%	4.4	14.5x	7.3x
Food & Allied	18,975	19,087	-112.14	-0.59%	21	348,381	5.0%	360.7	6.1%	18.3x	5.4x	ISLAMIBANK	70,196	1.8%	134.1	10.8x	0.9x
IT	2,437	2,398	+38.88	+1.62%	11	32,066	0.5%	427.2	7.3%	26.5x	2.1x	ICB	59,407	1.5%	4.8	NM	1.4x
Textile	1,270	1,263	+6.42	+0.51%	58	131,739	1.9%	513.1	8.7%	NM	0.9x	UNILEVERCL	52,763	1.3%	1.3	59.5x	24.1x
Paper & Printing	5,126	5,044	+82.57	+1.64%	6	23,518	0.3%	82.5	1.4%	36.7x	1.0x	DUTCHBANGL	48,774	1.2%	34.9	6.4x	1.0x
Tannery	2,274	2,288	-13.90	-0.61%	6	24,907	0.4%	41.9	0.7%	42.9x	2.3x	OLYMPIC	40,848	1.0%	95.6	24.4x	3.9x
Jute	15,657	15,062	+594.42	+3.95%	3	3,669	0.1%	186.2	3.2%	NM	NM	POWERGRID	37,375	0.9%	5.2	NM	0.2x
Ceramics	460	452	+7.70	+1.70%	5	20,431	0.3%	64.8	1.1%	54.5x	1.2x	EBL	36,262	0.9%	21.2	5.2x	0.9x
Miscellaneous	4,279	4,254	+25.03	+0.59%	15	233,134	3.4%	192.2	3.3%	39.4x	1.8x	BXPHARMA	33,592	0.8%	54.8	6.3x	0.7x
Corporate Bond**	7,408	7,248	+159.89	+2.21%	16	34,259	0.5%	1.8	0.0%	NM	NM	MJLBD	31,644	0.8%	76.2	10.2x	2.2x
Treasury Bond**	357	356	+0.43	+0.12%	237	2,904,242	41.9%	30.4	0.5%	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
SPCERAMICS	17.6	+10.0%	48.4	80.0x	0.6x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	AGNISYSL	35.1	+2.6%	320.0	32.8x	2.1x
NORTHERN	142.1	+10.0%	1.0	NM	1.7x	BEXIMCO	69,460	5.1%	NM	1.2x	LINDEBD	1,453.6	-1.0%	225.3	38.6x	3.6x
KBPPWBIL	156.8	+10.0%	71.7	NM	13.3x	BATBC	45,948	3.4%	12.2x	3.8x	BSCPLC	159.7	+8.1%	202.4	13.6x	1.7x
PREMIERLEA	4.6	+9.5%	0.0	NM	NM	RENATA	35,002	2.6%	39.4x	2.8x	SONALIANSH	272.9	+2.7%	184.9	31.8x	4.1x
SKTRIMS	16.2	+9.5%	8.5	12.3x	1.0x	ISLAMIBANK	33,649	2.5%	10.8x	0.9x	NRBBANK	13.6	+1.5%	165.4	16.5x	1.1x
ORIONINFU	349.4	+8.7%	68.8	NM	23.4x	BXPHARMA	32,479	2.4%	6.3x	0.7x	GP	336.4	-1.0%	146.9	12.9x	6.3x
NTC	447.8	+8.7%	1.9	NM	NM	BRACBANK	32,157	2.4%	10.2x	1.4x	ISLAMIBANK	43.6	+3.8%	134.1	10.8x	0.9x
JUTESPINN	237.7	+8.7%	0.2	NM	NM	GP	30,004	2.2%	12.9x	6.3x	BRACBANK	56.0	-0.7%	126.4	10.2x	1.4x
ADNTEL	90.6	+8.5%	15.7	NM	2.9x	LHBL	24,690	1.8%	15.8x	3.9x	IBNSINA	338.4	-4.2%	122.6	15.3x	3.2x
BSCPLC	159.7	+8.1%	202.4	13.6x	1.7x	EBL	24,199	1.8%	5.2x	0.9x	ACMELAB	90.6	+1.3%	122.5	7.9x	0.8x
						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%	4.5x	0.6x						
						ALARABANK	13,534	1.0%	10.1x	1.1x						
						PRIMEBANK	12,985	1.0%	4.9x	0.8x						
						OLYMPIC	12,616	0.9%	24.4x	3.9x						
						UTTARABANK	11,350	0.8%	11.9x	0.8x						
						ORIONPHARM	11,317	0.8%	10.8x	0.5x						
						ROBI	10,738	0.8%	31.8x	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)
PRIMETEX	14.8	-8.1%	2.8	NM	0.2x						AIL	86.0	86.0	3.0	917	78.83
ICBAMCL2ND	6.6	-5.7%	0.9	NM	1x						EIL	51.5	51.5	5.0	1,129	58.14
NATLIFEINS	136.2	-5.6%	8.8	NM	NM						AGNISYSL	35.0	35.0	6.0	1,300	45.50
FASFIN	4.0	-4.8%	0.0	NM	NM						SBACBANK	9.5	7.9	2.0	5,200	41.24
HAMI	107.0	-4.7%	3.3	NM	11.8x						PRAGATILIF	211.0	180.0	14.0	117	22.03
BDLAMPS	131.9	-4.4%	6.4	NM	2.2x						BEACHHATCH	89.0	82.0	10.0	253	21.02
IBNSINA	338.4	-4.2%	122.6	15.3x	3.2x						ISLAMIBANK	44.8	42.3	2.0	351	15.23
TAMIJTEX	136.9	-4.2%	4.4	20.6x	1.4x						BXPHARMA	75.0	75.0	1.0	170	12.75
LIBRAINFU	991.0	-4.2%	80.8	NM	1.2x						MIDLANDBNK	27.8	25.0	2.0	415	10.56
BIFC	7.3	-3.9%	0.1	NM	NM						BEXIMCO	114.5	104.1	11.0	95	10.10

* 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	86.0	86.0	78.8	917	3
EIL	51.5	51.5	58.1	1,129	5
AGNISYSL	35.0	35.0	45.5	1,300	6
SBACBANK	9.5	7.9	41.2	5,200	2
PRAGATILIF	211.0	180.0	22.0	117	14
BEACHHATCH	89.0	82.0	21.0	253	10
ISLAMIBANK	44.8	42.3	15.2	351	2
BXPHARMA	75.0	75.0	12.8	170	1
MIDLANDBNK	27.8	25.0	10.6	415	2
BEXIMCO	114.5	104.1	10.1	95	11
BRACBANK	57.0	56.9	6.7	118	4
ORIONINFU	310.2	300.3	6.7	22	2
PRIMEBANK	25.0	25.0	6.1	245	1
POWERGRID	45.0	45.0	4.5	100	1
WATACHEM	129.0	129.0	4.0	31	3
KBPPWBIL	140.0	135.0	3.8	27	3
CENTRALINS	41.1	41.1	1.6	38	1
CENTRALINS	41.1	41.1	1.6	38	1
SONALIPAPR	163.1	163.1	1.6	10	1
ADNTEL	87.0	87.0	1.3	15	1
NRBBANK	12.5	12.5	1.3	100	1
IBNSINA	354.7	354.7	1.1	3	1
Total			363.8		87

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PRIMETEX		0.0%	0%	Record Date	2-Oct-24
EHL		0.0%	19%	Record Date	3-Oct-24
PRIMELIFE		0.0%	1%	Record Date	9-Oct-24

Important DSE News

JAMUNABANK

Mr. Md. Hasan, a Director of the company, has expressed his intention to transfer 6,500,000 shares of the company to his wife Mrs. Fateha Begum Runa, by way of gift outside the trading system of the Exchange within next 30 working days with effect from September 09, 2024.

PRIMETEX

The Board of Directors has recommended No dividend for the year ended June 30, 2023. Date of AGM: 24.10.2024, Time: 11:00 AM. Record date: 02.10.2024. The Company has also reported EPS of Tk. (8.05), NAV per share of Tk. 64.83 and NOCFPS of Tk. (11.75) for the year ended June 30, 2023 as against Tk. 0.43, Tk. 74.65 and Tk. (1.10) respectively for the year ended June 30, 2022. The Company has also informed that reason for significant deviation in EPS, NOCFPS and NAVPS as follows: EPS decreased drastically due to decreasing of sales, increasing of raw material consumption costs per kg and also under utilization of capacity and also adjustment of profit and loss of associates in the year of 2023. NOCFPS has been decreased to Tk. (11.75) compared to the same of last year which was Tk. (1.10) per share due to payment to cost of goods sold, trade payable and operating expenses during the year. NAVPS has been decreased at the end of the reporting period due to the loss incurred for the year 2022-2023.

BSCPLC

Refer to their earlier news disseminated by DSE on 15.02.2024. In this connection, the company has further informed that the Bangladesh Securities and Exchange Commission (BSEC) has given its consent to issue of 2,21,33,333 ordinary shares (face value of Taka 10 and premium of Taka 65 each) at a price of Taka 75 each in favour of the Secretary, Posts and Telecommunications Division (On behalf of Government of Bangladesh) against the equity money received amounting Taka 140 crore in the FY 2015-2016 and Taka 26 crore in the FY 2016-2017, in total of Taka 166 crore under the Development Project named 'Regional Submarine Telecommunications Project, Bangladesh (Installation and Establishment of Second Submarine Cable System (SMW-5) for International Telecommunications in Bangladesh)'.

PRIMEBANK

The company has informed that the registered office address of the company has been changed to Simpletree Anarkali, Holding No.-89, Plot No.-03, Block-CWS(A), Gulshan Avenue, Ward No.-19, Dhaka North City Corporation, Police Station-Gulshan, District-Dhaka.

ISLAMIINS

Ms. Ayesha Nivrash Sayeed, a Director of the Company, has expressed her intention to buy 8,25,000 shares of the Company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

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