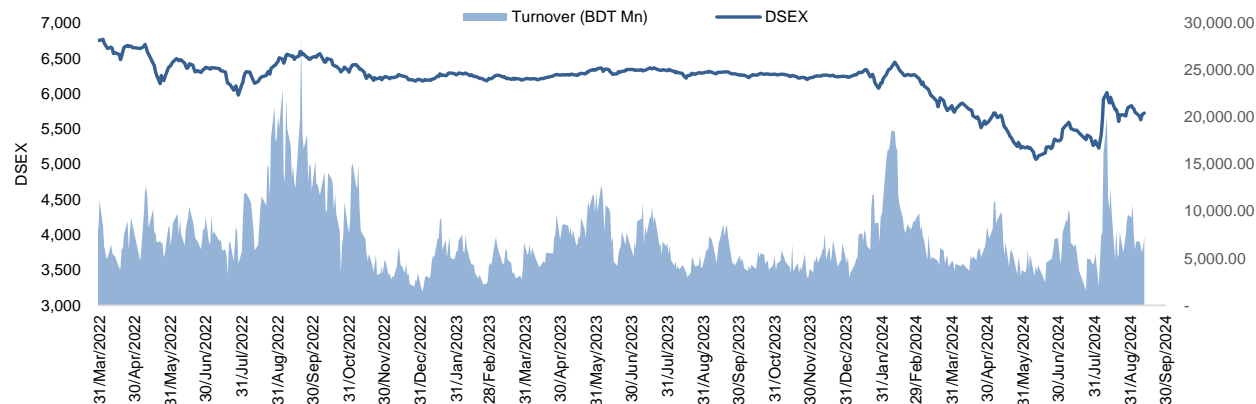


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.22%) gained 12.56 points and closed at 5,726.52. The blue-chip index DS30 (-0.33%), the Shariah-based index DSES (+0.38%), and the large-cap index CDSET (-0.07%) closed at 2,100.75, 1,245.68, and 1,135.98 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 1.31% followed by NBF (I) (-0.71%), Food & Allied (-0.35%), Fuel & Power (-0.17%), Bank (-0.16%), Engineering (+0.16%), and Pharmaceutical (+0.74%), respectively. Block trades contributed 7.5% of the overall market turnover. Linde Bangladesh Limited (+0.7%) was the most traded share with a turnover of BDT 517 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,726.52	5,713.96	+12.56	+0.22%	-8.3%
DS30	2,100.75	2,107.81	-7.06	-0.33%	+0.3%
DSES	1,245.68	1,240.92	+4.76	+0.38%	-8.7%
CDSET	1,135.98	1,136.75	-0.77	-0.07%	-5.6%

	Advanced	Declined	Unchanged	Total
All Category	158	181	58	397
A Category (Equity)	91	114	32	237
B Category (Equity)	43	45	14	102
N Category (Equity)	3	0	1	4
Z Category (Equity)	21	22	11	54
Mutual Funds	6	15	16	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,933,290	6,930,579	+0.0%
	Mn USD	57,777	57,755	
Turnover	Mn BDT	7,334	6,252	+17.3%
	Mn USD	61	52	
Volume	Mn Shares	175	181	-3.3%
No. of Trade		188,976	169,918	+11.2%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 12, 2024

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Figure: Sectorial Turnover (BDT Mn)

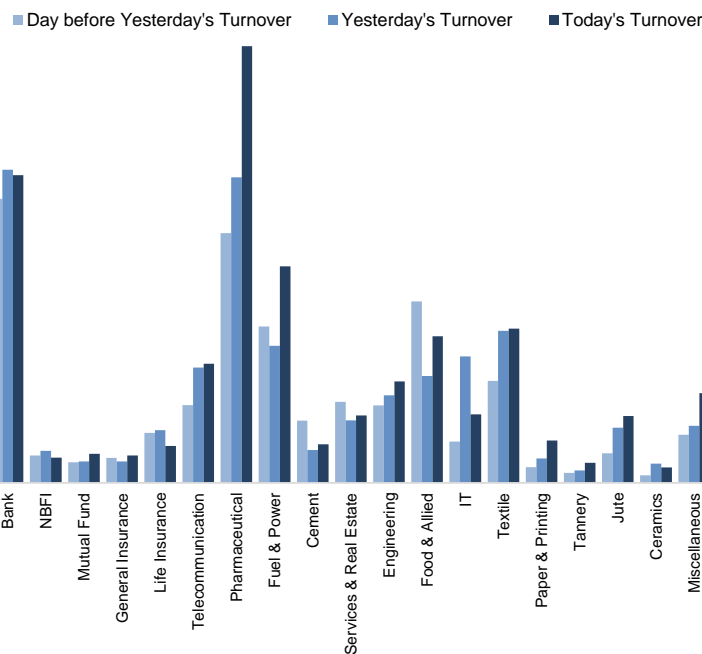
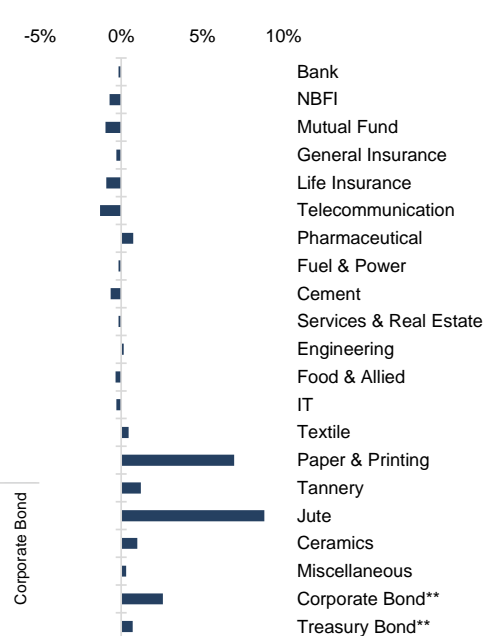


Figure: Sectorial Mcap Change



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	1,536	1,539	-2.51	-0.16%	36	735,921	10.6%	1,038.9	15.3%	8.0x	0.7x	GP	447,759	11.2%	179.3	12.7x	6.2x
NBFI	1,345	1,355	-9.64	-0.71%	23	130,209	1.9%	85.2	1.3%	NM	NM	BATBC	215,352	5.4%	43.9	12.2x	3.7x
Mutual Fund	648	654	-6.36	-0.97%	37	30,276	0.4%	98.5	1.5%	NM	0.6x	SQRUPHARMA	204,593	5.1%	48.3	10.1x	1.7x
General Insurance	2,978	2,987	-8.66	-0.29%	43	86,263	1.2%	92.5	1.4%	15.7x	1.3x	WALTONHIL	195,146	4.9%	37.6	14.4x	1.7x
Life Insurance	2,230	2,251	-20.84	-0.93%	15	59,278	0.9%	124.7	1.8%	NM	NM	ROBI	146,138	3.7%	45.4	31.3x	2.3x
Telecommunication	5,360	5,431	-71.08	-1.31%	3	620,580	9.0%	401.9	5.9%	14.8x	4.1x	BEXIMCO	103,842	2.6%	0.1	NM	1.2x
Pharmaceutical	3,235	3,211	+23.64	+0.74%	34	613,734	8.9%	1,474.2	21.7%	16.4x	1.8x	BRACBANK	97,688	2.4%	176.7	10.0x	1.4x
Fuel & Power	1,289	1,291	-2.13	-0.17%	23	339,242	4.9%	730.9	10.8%	22.3x	0.7x	RENATA	90,117	2.3%	22.3	39.3x	2.8x
Cement	2,426	2,442	-15.89	-0.65%	7	115,845	1.7%	129.8	1.9%	18.8x	2.5x	UPGDCL	84,346	2.1%	4.9	11.3x	2.5x
Services & Real Estate	1,254	1,257	-2.15	-0.17%	9	69,356	1.0%	227.5	3.4%	22.5x	0.5x	BERGERPBL	83,016	2.1%	1.3	25.7x	5.4x
Engineering	3,116	3,111	+4.93	+0.16%	42	359,978	5.2%	342.6	5.0%	14.8x	1.1x	MARICO	72,403	1.8%	4.7	14.5x	7.3x
Food & Allied	18,910	18,975	-65.60	-0.35%	21	347,176	5.0%	495.0	7.3%	18.3x	5.4x	ISLAMIBANK	71,323	1.8%	131.6	11.0x	1.0x
IT	2,430	2,437	-7.12	-0.29%	11	31,973	0.5%	230.8	3.4%	26.4x	2.1x	ICB	59,234	1.5%	7.0	NM	1.4x
Textile	1,276	1,270	+5.90	+0.46%	58	132,351	1.9%	520.8	7.7%	NM	0.9x	UNILEVERCL	52,796	1.3%	1.8	59.5x	24.1x
Paper & Printing	5,484	5,126	+357.78	+6.98%	6	25,159	0.4%	142.8	2.1%	39.3x	1.1x	DUTCHBANGL	48,159	1.2%	13.3	6.3x	1.0x
Tannery	2,302	2,274	+27.50	+1.21%	6	25,208	0.4%	67.7	1.0%	43.4x	2.4x	OLYMPIC	39,088	1.0%	118.5	23.4x	3.8x
Jute	17,039	15,657	+1382.48	+8.83%	3	3,993	0.1%	225.7	3.3%	NM	NM	POWERGRID	37,375	0.9%	3.2	NM	0.2x
Ceramics	465	460	+4.60	+1.00%	5	20,635	0.3%	52.4	0.8%	55.0x	1.3x	EBL	36,126	0.9%	7.8	5.2x	0.9x
Miscellaneous	4,292	4,279	+13.23	+0.31%	15	233,855	3.4%	302.8	4.5%	39.6x	1.8x	BXPHARMA	34,128	0.9%	76.1	6.4x	0.7x
Corporate Bond**	7,599	7,408	+190.95	+2.58%	16	34,818	0.5%	1.6	0.0%	NM	NM	BEACONPHAR	31,647	0.8%	49.1	70.3x	5.2x
Treasury Bond**	359	357	+2.56	+0.72%	237	2,911,723	42.0%	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
RNSPIN	14.3	+10.0%	2.1	61.9x	1.4x	SQRUPHARMA	117,112	8.6%	10.1x	1.7x	LINDEBD	1,464.4	+0.7%	516.6	38.9x	3.6x
NORTHERN	156.3	+10.0%	2.0	NM	1.9x	BEXIMCO	69,460	5.1%	NM	1.2x	ACMELAB	92.7	+2.3%	244.8	8.1x	0.8x
PAPERPROC	141.0	+10.0%	29.0	48.9x	1.9x	BATBC	45,948	3.4%	12.2x	3.7x	NRBBANK	13.9	+2.2%	237.8	16.8x	1.1x
SONALIPAPR	169.1	+9.9%	64.2	NM	1.0x	RENATA	35,002	2.6%	39.3x	2.8x	SONALIANS	296.7	+8.7%	221.3	34.6x	4.4x
MONOSPOOL	163.7	+9.9%	15.4	44.0x	3.9x	ISLAMIBANK	33,649	2.5%	11.0x	1.0x	GP	331.6	-1.4%	179.3	12.7x	6.2x
RAHIMAFOD	131.2	+9.8%	26.0	NM	12.9x	BXPHARMA	32,479	2.4%	6.4x	0.7x	BSCPLC	161.8	+1.3%	177.2	13.8x	1.8x
APEXTANRY	96.0	+9.7%	5.1	NM	2x	BRACBANK	32,157	2.4%	10.0x	1.4x	BRACBANK	55.2	-1.4%	176.7	10.0x	1.4x
JUTESPINN	258.5	+8.8%	2.4	NM	NM	GP	30,004	2.2%	12.7x	6.2x	AGNISYSL	35.0	-0.3%	157.2	32.7x	2.1x
NTC	486.9	+8.7%	8.9	NM	NM	LHBL	24,690	1.8%	15.8x	3.9x	ORIONINFU	378.5	+8.3%	139.6	NM	25.4x
SONALIANS	296.7	+8.7%	221.3	34.6x	4.4x	EBL	24,199	1.8%	5.2x	0.9x	ISLAMIBANK	44.3	+1.6%	131.6	11.0x	1.0x
						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%	10.2x	1.1x						
						PRIMEBANK	12,985	1.0%	4.9x	0.8x						
						OLYMPIC	12,616	0.9%	23.4x	3.8x						
						UTTARABANK	11,350	0.8%	11.8x	0.8x						
						ORIONPHARM	11,317	0.8%	11.3x	0.5x						
						ROBI	10,738	0.8%	31.3x	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)
CONFIDCEM	68.3	-6.8%	73.0	7.8x	0.9x						IBNSINA	350.0	338.4	2.0	902	305.26
CRYSTALINS	61.3	-5.8%	14.2	21.3x	3x						BEACHHATCH	91.0	82.0	20.0	537	45.40
UTTARAFIN	20.0	-4.8%	0.3	NM	0.3x						AL-HAJTEX	141.0	135.0	12.0	276	38.13
NEWLINE	31.2	-4.6%	0.2	60.0x	1.3x						ISLAMIINS	41.0	41.0	4.0	818	33.55
ILFSL	4.3	-4.4%	0.5	NM	NM						ORIONINFU	340.1	320.1	5.0	74	23.92
PREMIERLEA	4.4	-4.3%	0.0	NM	NM						PRAGATILIF	196.0	181.0	12.0	121	23.02
OLYMPIC	195.5	-4.3%	118.5	23.4x	3.8x						KBPPWBIL	155.0	142.0	4.0	98	13.93
PHOENIXFIN	7.5	-3.8%	1.2	NM	NM						EIL	47.0	45.0	8.0	290	13.40
SONARBAINS	28.3	-3.7%	0.6	NM	1.3x						BEXIMCO	106.9	104.1	18.0	106	11.13
INTECH	19.8	-3.4%	4.6	52.1x	282.9x						LOVELLO	79.0	77.0	2.0	128	10.04

* 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
IBNSINA	350.0	338.4	305.3	902	2
BEACHHATCH	91.0	82.0	45.4	537	20
AL-HAJTEX	141.0	135.0	38.1	276	12
ISLAMIINS	41.0	41.0	33.6	818	4
ORIONINFU	340.1	320.1	23.9	74	5
PRAGATILIF	196.0	181.0	23.0	121	12
KBPPWBIL	155.0	142.0	13.9	98	4
EIL	47.0	45.0	13.4	290	8
BEXIMCO	106.9	104.1	11.1	106	18
LOVELLO	79.0	77.0	10.0	128	2
RELIANCE1	18.6	18.6	5.4	289	2
AIL	104.5	99.5	4.1	40	2
UNIONINS	37.1	37.1	2.8	76	1
AGNISYSL	38.5	38.5	1.9	50	1
ISLAMIBANK	42.5	42.5	1.6	38	1
CONFIDCEM	73.3	73.0	1.4	20	2
BATBC	434.7	434.7	1.3	3	1
BATBC	434.7	434.7	1.3	3	1
CRYSTALINS	62.7	62.7	1.1	17	1
MITHUNKNIT	17.3	17.3	1.0	59	1
BRACBANK	56.2	56.2	0.9	16	1
SONALIPAPR	169.1	169.1	0.8	5	1
Total			547.9		111

Important DSE News

NRBBANK

The company has informed that Mr. Tarek Reaz Khan joined as the Managing Director of the company on September 11, 2024.

ONEBANKPLC

Mr. Hefazatur Rahman, a Sponsor of the Company, has expressed his intention to sell 1,411,742 shares out of his total holding of 1,534,210 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

ISLAMICFIN

The company has informed that the Board of Directors has elected Janab Abul Quasem Haider as Chairman of the Board of Directors of the company with effect from September 05, 2024.

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

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