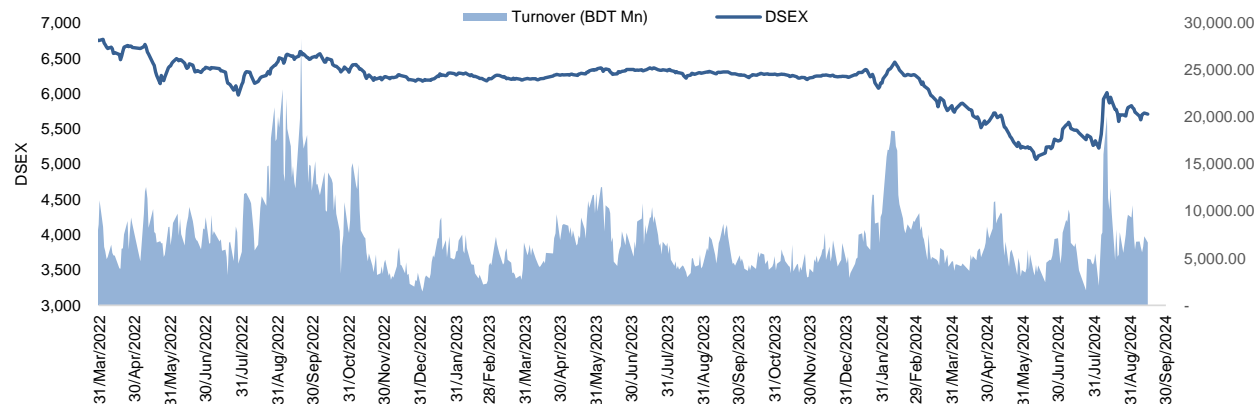


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.26%) lost 14.74 points and closed at 5,711.77. The blue-chip index DS30 (-0.72%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (-0.62%) closed at 2,085.53, 1,246.68, and 1,128.96 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.35% followed by Pharmaceutical (-0.91%), NBFi (-0.82%), Bank (-0.69%), Fuel & Power (-0.18%), Telecommunication (+0.35%), and Engineering (+0.92%), respectively. Block trades contributed 5.6% of the overall market turnover. Linde Bangladesh Limited (+2.5%) was the most traded share with a turnover of BDT 423 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,711.77	5,726.52	-14.74	-0.26%	-8.6%
DS30	2,085.53	2,100.75	-15.22	-0.72%	-0.4%
DSES	1,246.68	1,245.68	+1.00	+0.08%	-8.6%
CDSET	1,128.96	1,135.98	-7.02	-0.62%	-6.1%

	Advanced	Declined	Unchanged	Total
All Category	169	182	46	397
A Category (Equity)	82	130	25	237
B Category (Equity)	64	28	10	102
N Category (Equity)	2	2	0	4
Z Category (Equity)	21	22	11	54
Mutual Funds	5	21	10	36
Corporate Bonds	1	0	0	1
Treasury Bonds	1	1	0	2

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,931,336	6,933,290	-0.0%
	Mn USD	57,761	57,777	-0.0%
Turnover	Mn BDT	6,690	7,334	-8.8%
	Mn USD	56	61	-8.8%
Volume	Mn Shares	177	175	+1.0%
	No. of Trade	192,558	188,976	+1.9%

\* Average Interbank Exchange Rate is BDT 120.00 as of Sep 15, 2024

<b>Fahim Hassan</b> Research Analyst (888) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (888) 1708885202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

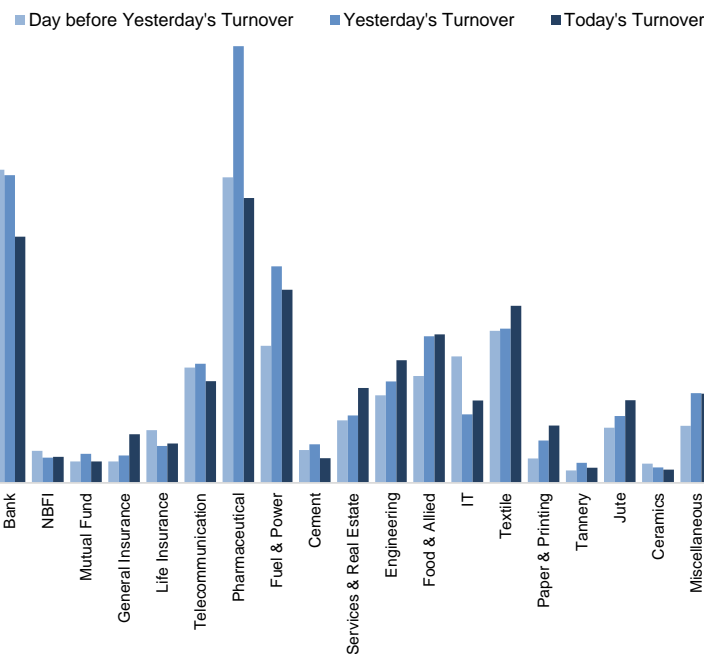
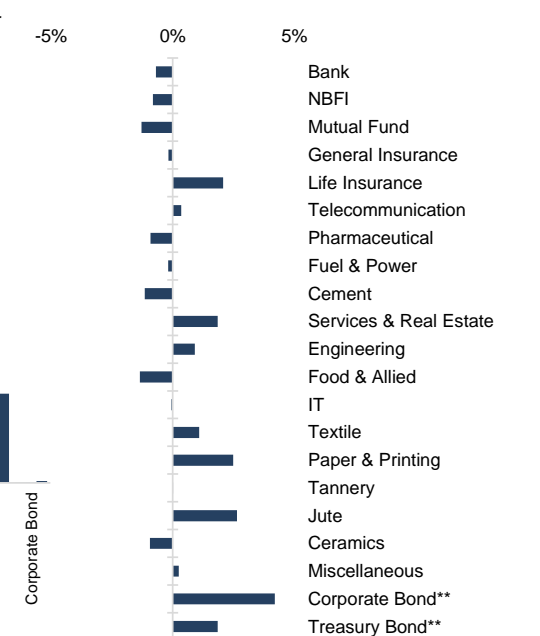


Figure: Sectorial Mcap Change



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	1,526	1,536	-10.63	-0.69%	36	730,828	10.5%	830.8	13.2%	7.9x	0.7x	GP	451,135	11.3%	214.2	12.8x	6.3x
NBFI	1,334	1,345	-10.99	-0.82%	23	129,145	1.9%	87.6	1.4%	NM	NM	BATBC	211,302	5.3%	71.9	12.0x	3.7x
Mutual Fund	640	648	-8.33	-1.29%	37	29,887	0.4%	72.2	1.1%	NM	0.6x	SQRPHARMA	203,441	5.1%	33.8	10.0x	1.7x
General Insurance	2,973	2,978	-5.22	-0.18%	43	86,112	1.2%	164.3	2.6%	15.6x	1.3x	WALTONHIL	197,025	4.9%	43.7	14.5x	1.7x
Life Insurance	2,276	2,230	+46.19	+2.07%	15	60,506	0.9%	133.0	2.1%	NM	NM	ROBI	145,091	3.6%	39.2	31.1x	2.3x
Telecommunication	5,379	5,360	+18.83	+0.35%	3	622,759	8.9%	343.6	5.4%	14.9x	4.1x	BEXIMCO	103,842	2.6%	0.2	NM	1.2x
Pharmaceutical	3,205	3,235	-29.58	-0.91%	34	608,122	8.7%	961.4	15.2%	16.3x	1.8x	BRACBANK	96,449	2.4%	138.6	9.9x	1.4x
Fuel & Power	1,286	1,289	-2.36	-0.18%	23	338,621	4.9%	651.7	10.3%	22.2x	0.7x	RENATA	88,615	2.2%	29.6	38.6x	2.7x
Cement	2,398	2,426	-27.98	-1.15%	7	114,509	1.6%	83.5	1.3%	18.5x	2.5x	UPGDCL	83,244	2.1%	6.9	11.1x	2.5x
Services & Real Estate	1,278	1,254	+23.25	+1.85%	9	70,642	1.0%	319.9	5.1%	22.9x	0.5x	BERGERPBL	82,437	2.1%	1.7	25.5x	5.4x
Engineering	3,144	3,116	+28.53	+0.92%	42	363,274	5.2%	413.7	6.6%	14.9x	1.1x	ISLAMIBANK	73,255	1.8%	129.2	11.3x	1.0x
Food & Allied	18,654	18,910	-256.01	-1.35%	21	342,476	4.9%	500.8	7.9%	18.0x	5.3x	MARICO	71,905	1.8%	6.2	14.4x	7.2x
IT	2,429	2,430	-1.26	-0.05%	11	31,956	0.5%	278.4	4.4%	26.4x	2.1x	ICB	58,974	1.5%	3.6	NM	1.4x
Textile	1,290	1,276	+13.91	+1.09%	58	133,794	1.9%	597.8	9.5%	NM	0.9x	UNILEVERCL	52,993	1.3%	1.4	59.7x	24.2x
Paper & Printing	5,620	5,484	+136.41	+2.49%	6	25,785	0.4%	193.8	3.1%	40.2x	1.1x	DUTCHBANGL	48,159	1.2%	19.0	6.3x	1.0x
Tannery	2,302	2,302	+0.31	+0.01%	6	25,211	0.4%	51.5	0.8%	43.4x	2.4x	OLYMPIC	37,948	1.0%	82.8	22.7x	3.7x
Jute	17,490	17,039	+450.96	+2.65%	3	4,099	0.1%	278.8	4.4%	NM	NM	POWERGRID	36,826	0.9%	6.6	NM	0.2x
Ceramics	460	465	-4.35	-0.94%	5	20,442	0.3%	44.6	0.7%	54.5x	1.2x	EBL	35,855	0.9%	8.8	5.2x	0.9x
Miscellaneous	4,303	4,292	+10.82	+0.25%	15	234,444	3.4%	301.3	4.8%	39.7x	1.8x	BXPHARMA	33,637	0.8%	32.8	6.3x	0.7x
Corporate Bond**	7,918	7,599	+319.01	+4.20%	16	35,950	0.5%	5.8	0.1%	NM	NM	MJLBD	31,580	0.8%	42.3	10.2x	2.2x
Treasury Bond**	366	359	+6.66	+1.85%	237	2,952,179	42.4%	0.6	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
SKTRIMS	18.7	+10.0%	30.9	14.2x	1.1x	SQRPHARMA	117,112	8.6%	10.0x	1.7x	LINDEBD	1,501.7	+2.5%	423.2	39.9x	3.7x
DSHGARME	94.0	+9.9%	9.6	NM	5.1x	BEXIMCO	69,460	5.1%	NM	1.2x	SONALIANS	308.5	+4.0%	271.6	35.9x	4.6x
OIMEX	23.4	+9.9%	46.6	65.4x	7.5x	BATBC	45,948	3.4%	12.0x	3.7x	GP	334.1	+0.8%	214.2	12.8x	6.3x
SEAPEARL	51.3	+9.9%	160.8	17.2x	2.6x	RENATA	35,002	2.6%	38.6x	2.7x	AGNISYSL	35.6	+1.7%	178.1	33.3x	2.2x
EMERALDOIL	34.3	+9.6%	47.5	26.5x	NM	ISLAMIBANK	33,649	2.5%	11.3x	1.0x	ORIONINFU	411.6	+8.7%	161.3	NM	27.6x
HRTEX	41.5	+9.5%	11.1	NM	1.2x	BXPHARMA	32,479	2.4%	6.3x	0.7x	SEAPEARL	51.3	+9.9%	160.8	17.2x	2.6x
CENTRALPHL	15.8	+9.0%	34.5	NM	2x	BRACBANK	32,157	2.4%	9.9x	1.4x	NRBBANK	13.4	-3.6%	143.2	16.2x	1.1x
MITHUNKNIT	17.2	+8.9%	2.7	NM	5.4x	GP	30,004	2.2%	12.8x	6.3x	BRACBANK	54.5	-1.3%	138.6	9.9x	1.4x
ORIONINFU	411.6	+8.7%	161.3	NM	27.6x	LHBL	24,690	1.8%	15.6x	3.9x	ISLAMIBANK	45.5	+2.7%	129.2	11.3x	1.0x
SONALIPAPR	181.7	+7.5%	118.0	NM	1.1x	EBL	24,199	1.8%	5.2x	0.9x	SONALIPAPR	181.7	+7.5%	118.0	NM	1.1x
						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%	4.5x	0.6x						
						ALARABANK	13,534	1.0%	10.2x	1.1x						
						PRIMEBANK	12,985	1.0%	4.8x	0.8x						
						OLYMPIC	12,616	0.9%	22.7x	3.7x						
						UTTARABANK	11,350	0.8%	11.3x	0.8x						
						ORIONPHARM	11,317	0.8%	11.0x	0.5x						
						ROBI	10,738	0.8%	31.1x	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)
TRUSTB1MF	3.9	-9.3%	4.9	NM	0.4x						IBNSINA	345.0	339.3	3.0	305	103.52
NTC	444.3	-8.7%	11.1	NM	NM						PRAGATILIF	217.0	187.0	22.0	324	63.21
EBL1STMF	4.0	-7.0%	1.0	NM	0.4x						AIL	105.1	86.2	2.0	514	44.60
AMBEEPHA	920.8	-6.4%	15.8	NM	90.0x						BEACHHATCH	92.3	89.0	4.0	332	29.81
KOHINOOR	563.2	-5.4%	24.3	49.7x	9.8x						MIDLANDBNK	27.7	26.7	4.0	900	24.41
PRIMEFIN	6.3	-4.5%	2.1	NM	0.7x						SBACBANK	7.7	7.7	1.0	2,600	20.02
PREMIERLEA	4.2	-4.5%	0.1	NM	NM						FINEFOODS	170.0	151.0	5.0	69	10.79
MBL1STMF	4.4	-4.3%	1.5	NM	0.5x						BEXIMCO	107.9	104.1	14.0	82	8.63
APOLLOISPAT	4.5	-4.3%	2.1	NM	0.2x						WATACHEM	132.0	132.0	2.0	64	8.45
REGENTTEX	4.8	-4.0%	0.2	NM	0.2x						UCB	12.5	12.5	1.0	669	8.36

\* 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	345.0	339.3	103.5	305	3
PRAGATILIF	217.0	187.0	63.2	324	22
AIL	105.1	86.2	44.6	514	2
BEACHHATCH	92.3	89.0	29.8	332	4
MIDLANDBNK	27.7	26.7	24.4	900	4
SBACBANK	7.7	7.7	20.0	2,600	1
FINEFOODS	170.0	151.0	10.8	69	5
BEXIMCO	107.9	104.1	8.6	82	14
WATACHEM	132.0	132.0	8.4	64	2
UCB	12.5	12.5	8.4	669	1
1STPRIMFMF	34.9	33.7	7.3	212	5
AL-HAJTEX	142.0	135.0	6.2	45	3
LOVELLO	88.0	84.6	5.3	62	2
POWERGRID	44.9	44.9	4.5	100	1
ORIONINFU	375.0	350.2	4.4	12	2
KBPPWBIL	165.0	165.0	4.1	25	1
PRIMEBANK	24.5	24.5	3.0	122	1
PRIMEBANK	24.5	24.5	3.0	122	1
BRACBANK	56.2	56.2	2.2	39	1
QUASEMIND	41.0	41.0	2.1	52	2
UNIQUEHRL	53.5	53.5	1.6	30	1
NLTUBES	80.0	74.0	1.3	16	2
<b>Total</b>			<b>374.3</b>		<b>90</b>

**Important DSE News**

**AGRANINS**

Refer to their earlier news disseminated by DSE on 31.03.2024 regarding decision to issue rights shares, the company has further informed that due to unavoidable circumstances, the company is currently withdrawing that application.

**IFIC**

The company has informed that the Board of Directors has elected Mr. Md. Mehmood Husain as the Chairman of the Board of Directors of the company.

**NRBBANK**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'NRB Bank PLC. ' instead of 'NRB Bank Limited' with effect from September 17, 2024. Other things (except name) will remain unchanged.

**WALTONHIL**

Mr. S. M. Shamsul Alam, a Sponsor Director of the company, has expressed his intention to transfer a total of 36,439,253 shares of the company comprising 9,175,701 shares to his daughter Ms. Tahmina Afrose Tanna (a director of the company); 18,175,701 shares to his daughter Ms. Sabiha Jarin Orona (general shareholder of the company) and 9,087,851 shares to his spouse Ms. Shahinur Akter Jolly (general shareholder of the company) by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 11, 2024.

**NRBCBANK**

Mr. Loquit Ullah, a Sponsor Director of the company, has expressed his intention to transfer 13,329,300 shares of the company to his son Mr. Anwar Hossain (general shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days with effect from September 11, 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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