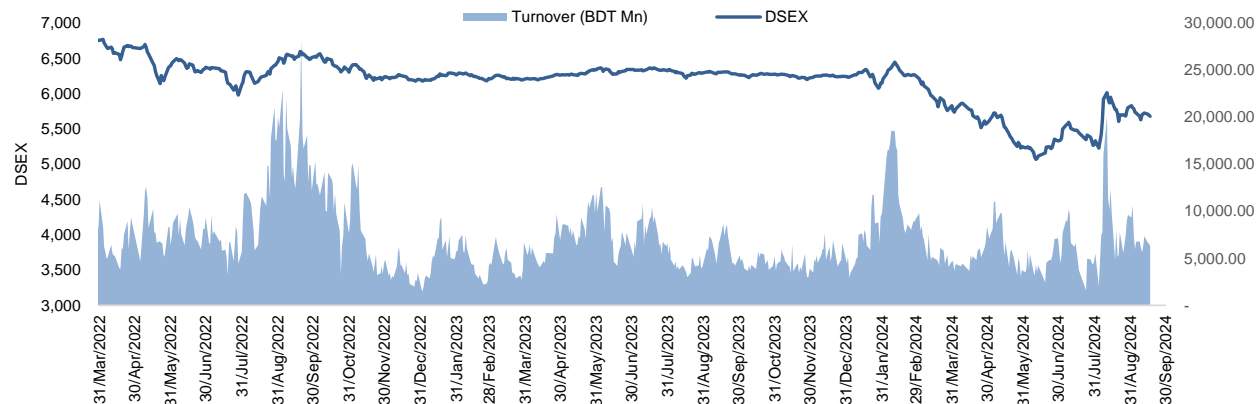


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.53%) lost 30.17 points and closed at 5,681.60. The blue-chip index DS30 (-0.81%), the Shariah-based index DSES (-0.68%), and the large-cap index CDSET (-0.69%) closed at 2,068.61, 1,238.19, and 1,121.16 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.23% followed by Pharmaceutical (-1.09%), Telecommunication (-0.77%), Bank (-0.67%), Food & Allied (-0.52%), Fuel & Power (-0.17%), and NBF1 (+2.11%), respectively. Block trades contributed 3.0% of the overall market turnover. Sonali Aansh Industries Limited (-3.2%) was the most traded share with a turnover of BDT 219 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,681.60	5,711.77	-30.17	-0.53%	-9.0%
DS30	2,068.61	2,085.53	-16.92	-0.81%	-1.2%
DSES	1,238.19	1,246.68	-8.49	-0.68%	-9.2%
CDSET	1,121.16	1,128.96	-7.80	-0.69%	-6.8%

	Advanced	Declined	Unchanged	Total
All Category	156	182	63	401
A Category (Equity)	82	126	34	242
B Category (Equity)	50	36	16	102
N Category (Equity)	4	0	0	4
Z Category (Equity)	20	20	13	53
Mutual Funds	16	12	9	37
Corporate Bonds	1	2	0	3
Treasury Bonds	1	4	0	5

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,904,428	6,931,336	-0.4%
	Mn USD	57,537	57,761	
Turnover	Mn BDT	6,350	6,690	-5.1%
	Mn USD	53	56	
Volume	Mn Shares	194	177	+10.0%
No. of Trade		196,878	192,558	+2.2%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 17, 2024

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Figure: Sectorial Turnover (BDT Mn)

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

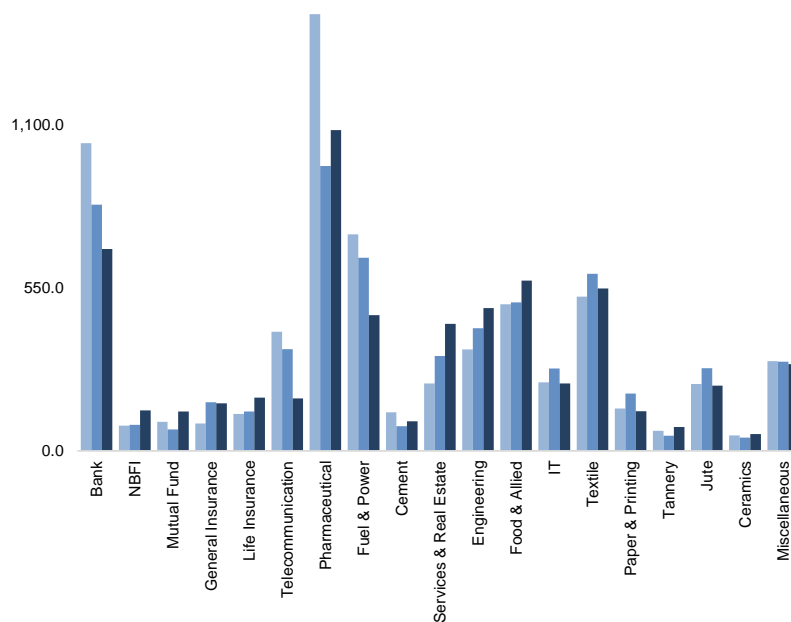
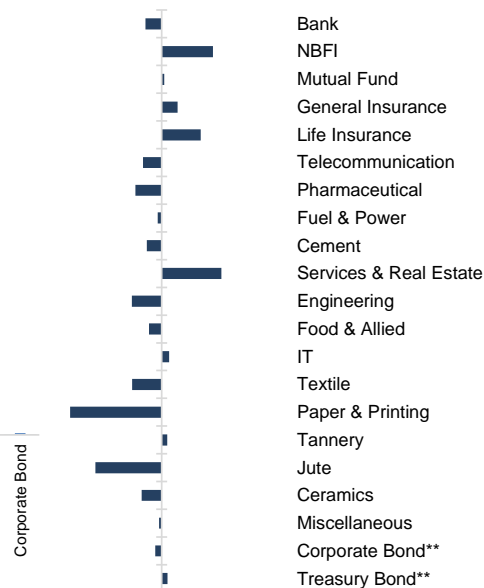


Figure: Sectorial Mcap Change

-5% 0% 5%



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	1,526	-10.25	-0.67%	36	725,917	10.5%	681.6	11.1%	7.9x	0.7x	GP	446,679	11.2%	99.7	12.6x	6.2x
NBFI	1,362	1,334	+28.17	+2.11%	23	131,872	1.9%	136.8	2.2%	NM	NM	BATBC	210,924	5.3%	156.3	12.0x	3.7x
Mutual Fund	640	640	+0.64	+0.10%	37	29,917	0.4%	133.0	2.2%	NM	0.6x	SQRPHARMA	203,795	5.1%	76.8	10.1x	1.7x
General Insurance	2,992	2,973	+19.42	+0.65%	43	86,674	1.3%	160.4	2.6%	15.7x	1.3x	WALTONHIL	193,147	4.9%	38.5	14.2x	1.7x
Life Insurance	2,312	2,276	+36.46	+1.60%	15	61,475	0.9%	179.4	2.9%	NM	NM	ROBI	145,091	3.7%	21.1	31.1x	2.3x
Telecommunication	5,337	5,379	-41.19	-0.77%	3	617,990	8.9%	177.5	2.9%	14.7x	4.1x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,170	3,205	-34.82	-1.09%	34	601,516	8.7%	1,082.6	17.6%	16.1x	1.7x	BRACBANK	95,387	2.4%	97.5	9.8x	1.3x
Fuel & Power	1,284	1,286	-2.12	-0.17%	23	338,062	4.9%	458.3	7.4%	22.2x	0.7x	RENATA	87,502	2.2%	13.1	38.1x	2.7x
Cement	2,383	2,398	-14.54	-0.61%	7	113,814	1.6%	99.8	1.6%	18.4x	2.5x	UPGDCL	83,534	2.1%	2.6	11.1x	2.5x
Services & Real Estate	1,309	1,278	+31.31	+2.45%	9	72,373	1.0%	428.3	7.0%	23.5x	0.5x	BERGERPBL	82,502	2.1%	0.5	25.5x	5.4x
Engineering	3,106	3,144	-38.69	-1.23%	42	358,805	5.2%	482.0	7.8%	14.8x	1.1x	LHBL	73,515	1.9%	17.3	15.4x	3.8x
Food & Allied	18,557	18,654	-97.12	-0.52%	21	340,693	4.9%	574.5	9.3%	17.9x	5.3x	MARICO	71,203	1.8%	5.0	14.2x	7.2x
IT	2,436	2,429	+7.50	+0.31%	11	32,055	0.5%	228.0	3.7%	26.4x	2.1x	ICB	59,667	1.5%	4.0	NM	1.4x
Textile	1,274	1,290	-15.61	-1.21%	58	132,175	1.9%	548.3	8.9%	NM	0.9x	UNILEVERCL	53,120	1.3%	0.8	59.9x	24.2x
Paper & Printing	5,409	5,620	-211.53	-3.76%	6	24,815	0.4%	134.2	2.2%	38.7x	1.1x	DUTCHBANGL	47,632	1.2%	11.7	6.2x	1.0x
Tannery	2,307	2,302	+5.20	+0.23%	6	25,268	0.4%	81.0	1.3%	43.5x	2.4x	OLYMPIC	36,909	0.9%	42.7	22.1x	3.6x
Jute	17,014	17,490	-475.99	-2.72%	3	3,987	0.1%	220.2	3.6%	NM	NM	POWERGRID	36,826	0.9%	4.8	NM	0.2x
Ceramics	457	460	-3.80	-0.83%	5	20,273	0.3%	56.4	0.9%	54.0x	1.2x	EBL	35,583	0.9%	37.5	5.1x	0.8x
Miscellaneous	4,298	4,303	-4.80	-0.11%	15	234,183	3.4%	292.4	4.7%	39.6x	1.8x	BXPHARMA	32,745	0.8%	51.6	6.1x	0.7x
Corporate Bond**	7,897	7,918	-20.79	-0.26%	16	35,540	0.5%	0.4	0.0%	NM	NM	MJLBD	30,757	0.8%	34.4	9.9x	2.1x
Treasury Bond**	367	366	+0.90	+0.24%	237	2,946,458	42.5%	3.7	0.1%	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
BDTHAI	15.4	+10.0%	55.2	NM	0.6x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	SONALIANS	298.7	-3.2%	218.7	34.8x	4.5x
GHCL	31.9	+10.0%	54.0	NM	0.7x	BEXIMCO	69,460	5.1%	NM	1.2x	LINDEBD	1,486.0	-1.0%	196.5	39.4x	3.6x
GLDNJMF	10.2	+9.7%	24.5	NM	1.0x	BATBC	45,948	3.4%	12.0x	3.7x	SEAPPEARL	54.3	+5.8%	193.5	18.2x	2.8x
ISLAMICFIN	13.8	+9.5%	8.5	NM	1.3x	RENATA	35,002	2.6%	38.1x	2.7x	BATBC	390.6	-0.2%	156.3	12.0x	3.7x
BDTHAIFOOD	22.4	+9.3%	10.1	NM	1.5x	ISLAMIBANK	33,649	2.5%	11.3x	1.0x	ORIONINFU	387.0	-6.0%	134.0	NM	25.9x
BAYLEASING	11.3	+8.7%	5.5	NM	2.2x	BXPHARMA	32,479	2.4%	6.1x	0.7x	NRBBANK	12.8	-4.5%	131.7	15.5x	1.0x
SAIFPOWER	20.0	+7.5%	68.5	31.3x	1x	BRACBANK	32,157	2.4%	9.8x	1.3x	KBPWBIL	173.2	-1.9%	122.6	NM	14.7x
PHOENIXFIN	7.8	+6.8%	4.3	NM	NM	GP	30,004	2.2%	12.6x	6.2x	AGNISYSL	33.7	-5.3%	114.5	31.5x	2.1x
GRAMEENS2	13.7	+6.2%	10.7	NM	0.9x	LHBL	24,690	1.8%	15.4x	3.8x	BEACHHATCH	92.3	+0.8%	103.3	47.8x	7.4x
SEAPPEARL	54.3	+5.8%	193.5	18.2x	2.8x	EBL	24,199	1.8%	5.1x	0.8x	GP	330.8	-1.0%	99.7	12.6x	6.2x
						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%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	22.1x	3.6x						
						UTTARABANK	11,350	0.8%	11.3x	0.8x						
						ORIONPHARM	11,317	0.8%	10.8x	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)
NTC	405.5	-8.7%	2.4	NM	NM	CENTRALINS	49.0	41.0	2.0	1,538	63.37					
LIBRAINFU	995.9	-6.1%	97.2	NM	1x	PRAGATILIF	214.0	196.0	13.0	154	31.54					
PAPERPROC	134.3	-6.1%	14.4	46.6x	1.9x	BEACHHATCH	91.6	89.0	13.0	322	28.92					
ORIONINFU	387.0	-6.0%	134.0	NM	25.9x	BEXIMCO	107.5	104.1	20.0	101	10.67					
BEACONPHAR	126.3	-5.8%	38.2	64.8x	4.8x	CRYSTALINS	67.8	62.3	2.0	149	9.34					
SONALIPAPR	171.5	-5.6%	84.7	NM	1.1x	NBL	6.1	6.1	1.0	1,500	9.15					
GEMINISEA	253.0	-5.5%	59.7	35.8x	11.5x	LOVELLO	87.7	74.8	6.0	77	6.53					
IFIC1STMF	3.5	-5.4%	2.1	NM	0.4x	BRACBANK	57.0	56.6	4.0	96	5.45					
AGNISYSL	33.7	-5.3%	114.5	31.5x	2.1x	OIMEX	24.5	24.5	3.0	159	3.90					
TAMJTEX	137.3	-5.3%	6.1	20.6x	1.5x	BATBC	425.5	357.1	2.0	6	2.51					

* 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
CENTRALINS	49.0	41.0	63.4	1,538	2
PRAGATILIF	214.0	196.0	31.5	154	13
BEACHHATCH	91.6	89.0	28.9	322	13
BEXIMCO	107.5	104.1	10.7	101	20
CRYSTALINS	67.8	62.3	9.3	149	2
NBL	6.1	6.1	9.2	1,500	1
LOVELLO	87.7	74.8	6.5	77	6
BRACBANK	57.0	56.6	5.5	96	4
OIMEX	24.5	24.5	3.9	159	3
BATBC	425.5	357.1	2.5	6	2
GPHISPAT	31.9	31.4	2.4	76	2
ORIONPHARM	52.8	52.8	2.3	44	1
FINEFOODS	163.7	160.0	2.3	14	2
ORIONINFU	377.9	377.9	2.1	6	1
NRBBANK	13.1	13.1	1.4	110	1
LINDEBD	1,440.0	1,440.0	1.4	1	1
MJLBD	102.0	102.0	1.0	10	1
MJLBD	102.0	102.0	1.0	10	1
MITHUNKNIT	18.9	18.9	0.8	44	1
BDTHAI	13.5	13.5	0.7	49	1
SAIHAMCOT	18.9	18.9	0.7	35	1
OLYMPIC	208.7	208.7	0.6	3	1
Total			190.9		86

Important DSE News

PBLPBOND

Pubali Bank PLC, issuer of Pubali Bank Perpetual Bond, has informed that the coupon rate of the bond will be @ 10.00% per annum for the next semiannual coupon period from September 23, 2024 to March 22, 2025.

STANDBANKL

Refer to their earlier news disseminated by DSE on 02.05.2024 regarding issuance of Standard Bank Coupon bearing non-convertible fully redeemable unsecured 4th Subordinated Bond, the company has further informed that Bangladesh Bank vide a letter dated August 12, 2024, has issued their No Objection Certificate (NOC) for BDT 350 Crore, instead of originally requested BDT 1,000 Crore. All other details of the proposed bond, including its purpose, terms, and conditions will remain unchanged.

EXIMBANK

Refer to their earlier news disseminated by DSE on 19.06.2024 regarding decision to issue Subordinated Bond, the company has further informed that Bangladesh Bank has given No Objection Certificate (NOC) for EXIM 6th Subordinated Bond for Tk. 250.00 crore (Taka two hundred fifty crore) only instead of Tk. 300.00 crore (Taka three hundred crore). Other things in the previously disseminated news in this regard will remain unchanged.

DGIC

The company has informed that Ms. Rokeya Quader has been elected as the Chairman of the company.

SKTRIMS

Repeat News- The company has informed that the Board of Directors has decided to stop production of SK Trims & Industries Ltd. and given a notice of Suspension of Work. To view the detailed PSI regarding Stop of Production, Notice of Suspension of Work and Lay-off of employees of SK Trims & Industries Ltd., please visit: https://www.dsebd.org/Annexure/2024/SKtrimsPSI_2024.pdf

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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