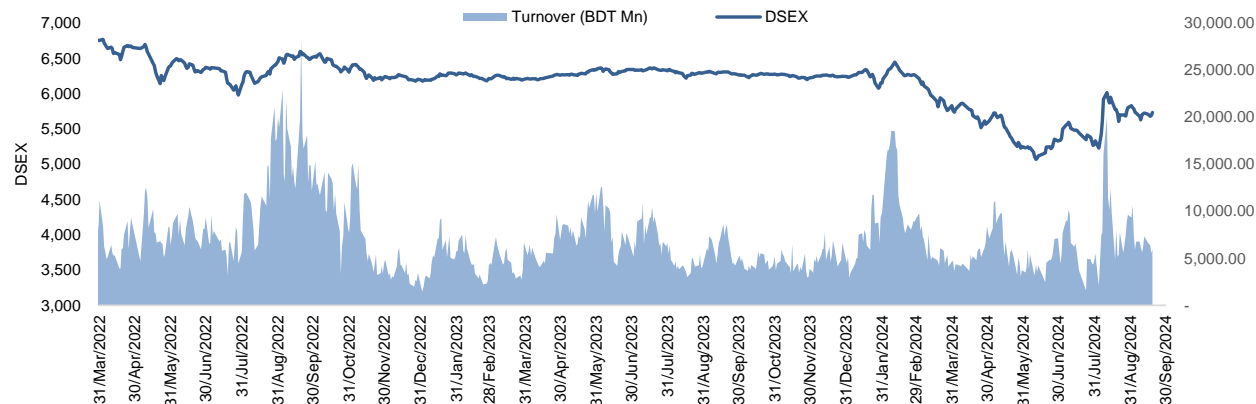


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.72%) gained 41.14 points and closed at 5,735.27. The blue-chip index DS30 (+1.42%), the Shariah-based index DSES (+0.97%), and the large-cap index CDSET (+1.13%) closed at 2,106.44, 1,257.81, and 1,139.71 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 4.66% followed by Food & Allied (+1.74%), Engineering (+1.14%), Bank (+0.76%), Pharmaceutical (+0.39%), Fuel & Power (+0.31%), and NBFi (-0.69%), respectively. Block trades contributed 8.3% of the overall market turnover. Grameenphone Ltd. (+4.5%) was the most traded share with a turnover of BDT 315 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 5,735.27 | 5,694.14 | +41.14 | +0.72% | -8.2% |
| DS30 | 2,106.44 | 2,076.98 | +29.46 | +1.42% | +0.6% |
| DSES | 1,257.81 | 1,245.68 | +12.13 | +0.97% | -7.8% |
| CDSET | 1,139.71 | 1,126.97 | +12.74 | +1.13% | -5.2% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 150 | 191 | 56 | 397 |
| A Category (Equity) | 112 | 87 | 39 | 238 |
| B Category (Equity) | 28 | 66 | 8 | 102 |
| N Category (Equity) | 0 | 4 | 0 | 4 |
| Z Category (Equity) | 10 | 34 | 9 | 53 |
| Mutual Funds | 11 | 10 | 16 | 37 |
| Corporate Bonds | 2 | 0 | 1 | 3 |
| Treasury Bonds | 0 | 1 | 0 | 1 |

| | Today | Last Day | Daily %Δ | |
|--------------|-----------|-----------|-----------|-------|
| Mcap | Mn BDT | 6,955,716 | 6,901,846 | +0.8% |
| | Mn USD | 57,964 | 57,515 | |
| Turnover | Mn BDT | 5,948 | 5,537 | +7.4% |
| | Mn USD | 50 | 46 | |
| Volume | Mn Shares | 158 | 162 | -2.1% |
| No. of Trade | | 177,864 | 163,055 | +9.1% |

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 19, 2024

| | |
|---|---|
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|---|---|

Figure: Sectorial Turnover (BDT Mn)

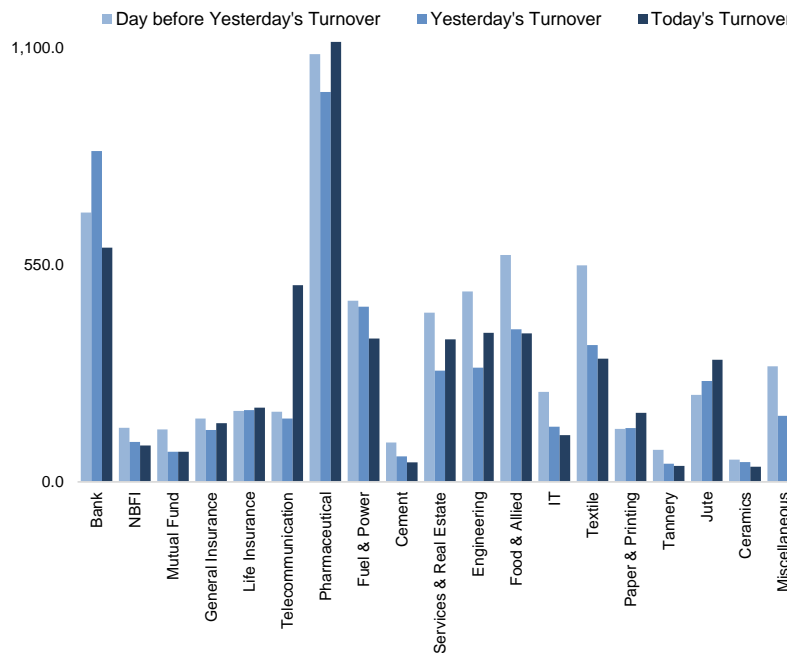
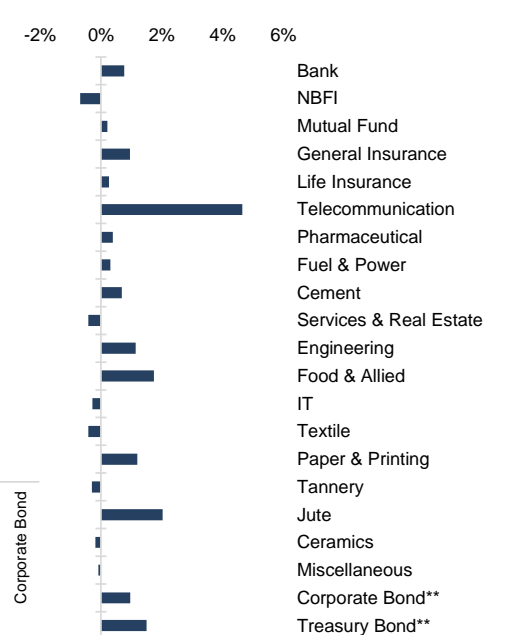


Figure: Sectorial Mcap Change



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 | 1,542 | 1,530 | +11.68 | +0.76% | 36 | 738,624 | 10.6% | 592.9 | 10.9% | 8.0x | 0.7x | GP | 463,693 | 11.5% | 314.7 | 13.1x | 6.5x |
| NBFI | 1,361 | 1,371 | -9.41 | -0.69% | 23 | 131,758 | 1.9% | 92.3 | 1.7% | NM | NM | BATBC | 215,460 | 5.4% | 58.3 | 12.2x | 3.7x |
| Mutual Fund | 637 | 636 | +1.38 | +0.22% | 37 | 29,777 | 0.4% | 76.3 | 1.4% | NM | 0.6x | SQRPHARMA | 204,327 | 5.1% | 49.0 | 10.1x | 1.7x |
| General Insurance | 2,990 | 2,962 | +28.33 | +0.96% | 43 | 86,611 | 1.2% | 148.5 | 2.7% | 15.7x | 1.3x | WALTONHIL | 192,784 | 4.8% | 36.1 | 14.2x | 1.7x |
| Life Insurance | 2,339 | 2,333 | +6.18 | +0.27% | 15 | 62,189 | 0.9% | 187.8 | 3.4% | NM | NM | ROBI | 150,852 | 3.8% | 92.3 | 32.4x | 2.4x |
| Telecommunication | 5,541 | 5,295 | +246.50 | +4.66% | 3 | 641,606 | 9.2% | 497.9 | 9.1% | 15.3x | 4.3x | BEXIMCO | 103,842 | 2.6% | 0.0 | NM | 1.2x |
| Pharmaceutical | 3,199 | 3,186 | +12.38 | +0.39% | 34 | 606,900 | 8.7% | 1,113.5 | 20.4% | 16.2x | 1.7x | BRACBANK | 97,157 | 2.4% | 111.5 | 10.0x | 1.4x |
| Fuel & Power | 1,280 | 1,276 | +3.94 | +0.31% | 23 | 336,864 | 4.8% | 363.2 | 6.7% | 22.1x | 0.7x | RENATA | 89,016 | 2.2% | 26.1 | 38.8x | 2.7x |
| Cement | 2,418 | 2,402 | +16.41 | +0.68% | 7 | 115,500 | 1.7% | 49.6 | 0.9% | 18.7x | 2.5x | UPGDCL | 83,186 | 2.1% | 1.6 | 11.1x | 2.5x |
| Services & Real Estate | 1,292 | 1,298 | -5.43 | -0.42% | 9 | 71,450 | 1.0% | 360.8 | 6.6% | 23.2x | 0.5x | BERGERPBL | 82,752 | 2.1% | 0.7 | 25.6x | 5.4x |
| Engineering | 3,088 | 3,053 | +34.80 | +1.14% | 42 | 356,725 | 5.1% | 377.2 | 6.9% | 14.7x | 1.1x | LHBL | 75,025 | 1.9% | 9.4 | 15.8x | 3.9x |
| Food & Allied | 18,825 | 18,503 | +322.78 | +1.74% | 21 | 345,628 | 4.9% | 375.9 | 6.9% | 18.2x | 5.4x | MARICO | 71,187 | 1.8% | 2.7 | 14.2x | 7.2x |
| IT | 2,449 | 2,456 | -6.78 | -0.28% | 11 | 32,216 | 0.5% | 118.5 | 2.2% | 26.6x | 2.1x | ICB | 60,968 | 1.5% | 5.6 | NM | 1.4x |
| Textile | 1,260 | 1,265 | -5.20 | -0.41% | 58 | 130,694 | 1.9% | 311.8 | 5.7% | NM | 0.9x | UNILEVERCL | 52,085 | 1.3% | 0.7 | 58.7x | 23.8x |
| Paper & Printing | 5,597 | 5,530 | +66.46 | +1.20% | 6 | 25,676 | 0.4% | 175.0 | 3.2% | 40.1x | 1.1x | DUTCHBANGL | 48,071 | 1.2% | 23.2 | 6.3x | 1.0x |
| Tannery | 2,284 | 2,291 | -6.85 | -0.30% | 6 | 25,017 | 0.4% | 40.7 | 0.7% | 43.1x | 2.4x | OLYMPIC | 39,008 | 1.0% | 52.5 | 23.3x | 3.8x |
| Jute | 18,509 | 18,140 | +368.38 | +2.03% | 3 | 4,337 | 0.1% | 309.1 | 5.7% | NM | NM | POWERGRID | 36,644 | 0.9% | 0.8 | NM | 0.2x |
| Ceramics | 453 | 454 | -0.82 | -0.18% | 5 | 20,122 | 0.3% | 38.2 | 0.7% | 53.6x | 1.2x | EBL | 35,583 | 0.9% | 12.4 | 5.1x | 0.8x |
| Miscellaneous | 4,291 | 4,294 | -3.43 | -0.08% | 15 | 233,800 | 3.3% | 226.0 | 4.1% | 39.5x | 1.8x | BEACONPHAR | 33,426 | 0.8% | 86.1 | 74.2x | 5.5x |
| Corporate Bond** | 8,072 | 7,995 | +76.85 | +0.96% | 16 | 35,682 | 0.5% | 0.6 | 0.0% | NM | NM | BXPHARMA | 33,012 | 0.8% | 31.4 | 6.2x | 0.7x |
| Treasury Bond** | 374 | 369 | +5.52 | +1.50% | 237 | 2,953,933 | 42.3% | 0.4 | 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 | 19.0 | +8.6% | 23.1 | 14.4x | 1.2x | SQRPHARMA | 117,112 | 8.6% | 10.1x | 1.7x | GP | 343.4 | +4.5% | 314.7 | 13.1x | 6.5x |
| SONALILIFE | 65.9 | +8.4% | 9.1 | NM | NM | BEXIMCO | 69,460 | 5.1% | NM | 1.2x | SONALIANS | 333.4 | +2.6% | 307.2 | 38.8x | 5.0x |
| ICICL | 25.7 | +6.6% | 6.9 | 23.6x | 1.5x | BATBC | 45,948 | 3.4% | 12.2x | 3.7x | ORIONINFU | 360.2 | -7.7% | 186.9 | NM | 24.1x |
| PREMIERLEA | 4.0 | +5.3% | 0.0 | NM | NM | RENATA | 35,002 | 2.6% | 38.8x | 2.7x | LINDEBD | 1,467.0 | -0.3% | 179.7 | 38.9x | 3.6x |
| ROBI | 28.8 | +5.1% | 92.3 | 32.4x | 2.4x | ISLAMIBANK | 33,649 | 2.5% | 12.2x | 1.1x | SEAPEARL | 55.1 | +4.8% | 152.8 | 18.5x | 2.8x |
| SEAPEARL | 55.1 | +4.8% | 152.8 | 18.5x | 2.8x | BXPHARMA | 32,479 | 2.4% | 6.2x | 0.7x | IBNSINA | 350.4 | +3.2% | 138.6 | 15.9x | 3.3x |
| GP | 343.4 | +4.5% | 314.7 | 13.1x | 6x | BRACBANK | 32,157 | 2.4% | 10.0x | 1.4x | SONALIPAPR | 193.2 | +4.0% | 124.4 | NM | 1.2x |
| BSCPLC | 164.1 | +4.2% | 90.9 | 14.0x | 1.8x | GP | 30,004 | 2.2% | 13.1x | 6.5x | KBPWBIL | 171.6 | -1.6% | 117.4 | NM | 14.5x |
| BEACONPHAR | 144.7 | +4.2% | 86.1 | 74.2x | 5.5x | LHBL | 24,690 | 1.8% | 15.8x | 3.9x | ORIONPHARM | 44.5 | -5.3% | 115.3 | 10.1x | 0.5x |
| SONALIPAPR | 193.2 | +4.0% | 124.4 | NM | 1.2x | EBL | 24,199 | 1.8% | 5.1x | 0.8x | BRACBANK | 54.9 | +0.5% | 111.5 | 10.0x | 1.4x |
| | | | | | | 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% | 10.1x | 1.1x | | | | | | |
| | | | | | | PRIMEBANK | 12,985 | 1.0% | 4.7x | 0.7x | | | | | | |
| | | | | | | OLYMPIC | 12,616 | 0.9% | 23.3x | 3.8x | | | | | | |
| | | | | | | UTTARABANK | 11,350 | 0.8% | 11.9x | 0.8x | | | | | | |
| | | | | | | ORIONPHARM | 11,317 | 0.8% | 10.1x | 0.5x | | | | | | |
| | | | | | | ROBI | 10,738 | 0.8% | 32.4x | 2.4x | | | | | | |
| 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) |
| HAMI | 94.5 | -9.4% | 4.4 | NM | 10.4x | | | | | | ISLAMIBANK | 48.0 | 48.0 | 1.0 | 4,230 | 203.04 |
| ORIONINFU | 360.2 | -7.7% | 186.9 | NM | 24x | | | | | | BATBC | 390.0 | 390.0 | 1.0 | 200 | 78.00 |
| ORIONPHARM | 44.5 | -5.3% | 115.3 | 10.1x | 0.5x | | | | | | SBACBANK | 7.5 | 7.5 | 1.0 | 9,822 | 73.66 |
| BBSCABLES | 24.1 | -5.1% | 23.6 | NM | 0.7x | | | | | | IBNSINA | 340.0 | 339.0 | 2.0 | 101 | 34.40 |
| NEWLINE | 30.3 | -5.0% | 0.8 | 58.3x | 1.2x | | | | | | AIL | 97.0 | 86.3 | 2.0 | 305 | 26.46 |
| NAHEEACP | 28.3 | -4.7% | 25.7 | 24.4x | 1.4x | | | | | | ORIONINFU | 410.2 | 389.0 | 2.0 | 25 | 10.14 |
| UTTARAFIN | 19.0 | -4.5% | 1.9 | NM | 0.3x | | | | | | NBL | 6.3 | 6.3 | 1.0 | 1,400 | 8.82 |
| SHURWID | 9.5 | -4.0% | 1.5 | NM | 0.7x | | | | | | AL-HAJTEX | 141.0 | 135.0 | 5.0 | 59 | 8.20 |
| BDTHAI | 14.6 | -3.9% | 34.5 | NM | 0.5x | | | | | | MARICO | 2,372.2 | 2,343.0 | 2.0 | 3 | 7.53 |
| MIDASFIN | 10.1 | -3.8% | 1.8 | NM | 1.3x | | | | | | BEXIMCO | 104.6 | 104.1 | 7.0 | 55 | 5.76 |

* 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 |
|--------------|---------------------|---------------|-------------------|-----------------|--------------|
| ISLAMIBANK | 48.0 | 48.0 | 203.0 | 4,230 | 1 |
| BATBC | 390.0 | 390.0 | 78.0 | 200 | 1 |
| SBACBANK | 7.5 | 7.5 | 73.7 | 9,822 | 1 |
| IBNSINA | 340.0 | 339.0 | 34.4 | 101 | 2 |
| AIL | 97.0 | 86.3 | 26.5 | 305 | 2 |
| ORIONINFU | 410.2 | 389.0 | 10.1 | 25 | 2 |
| NBL | 6.3 | 6.3 | 8.8 | 1,400 | 1 |
| AL-HAJTEX | 141.0 | 135.0 | 8.2 | 59 | 5 |
| MARICO | 2,372.2 | 2,343.0 | 7.5 | 3 | 2 |
| BEXIMCO | 104.6 | 104.1 | 5.8 | 55 | 7 |
| WATACHEM | 150.0 | 150.0 | 5.7 | 38 | 1 |
| BDTHAI | 13.9 | 13.9 | 4.2 | 300 | 2 |
| LHBL | 67.6 | 67.5 | 4.1 | 60 | 2 |
| UNIQUEHRL | 52.9 | 52.9 | 2.6 | 50 | 1 |
| BEACHHATCH | 87.0 | 85.0 | 2.6 | 30 | 2 |
| PRAGATILIF | 245.0 | 226.0 | 1.9 | 8 | 2 |
| GHCL | 32.6 | 32.6 | 1.3 | 40 | 1 |
| GHCL | 32.6 | 32.6 | 1.3 | 40 | 1 |
| SONALIANS | 330.0 | 324.8 | 1.2 | 4 | 2 |
| BDFINANCE | 18.5 | 18.5 | 1.1 | 57 | 1 |
| LOVELLO | 72.0 | 72.0 | 0.9 | 13 | 1 |
| PREMIERCEM | 65.9 | 65.9 | 0.9 | 14 | 1 |
| Total | | | 491.7 | | 53 |

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

ISLAMIBANK

Refer to their earlier news disseminated by DSE on 25.04.2024 regarding the decision of the Board of Directors of the company taken in its meeting held on April 24, 2024 for issuance of IBBPLC Fifth Mudaraba Redeemable Non-Convertible Subordinated Bond up to BDT 10 (ten) billion. In this connection, the company has further informed that Bangladesh Bank has accorded No-objection Certificate (NOC) vide a letter dated 16/07/2024 for issuance of IBBPLC Fifth Mudaraba Redeemable Non-Convertible Subordinated Bond up to BDT 05 (five) billion instead of BDT 10 (ten) billion. Therefore, proposed bond will be issued up to BDT 05 (five) billion on private placement basis for augmenting Tier 2 regulatory capital of the Bank subject to approval of Bangladesh Securities and Exchange Commission.

WALTONHIL

Mr. S. M. Ashrafal Alam, a Sponsor Director of the company, has expressed his intention to transfer a total of 12,120,000 shares of the company comprising 6,060,000 shares to his son Mr. Shahriar Alam Shuvo and 6,060,000 shares to his daughter Ms. Fariha Alam Prova by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 17, 2024.

Mr. S. M. Nurul Alam Rezvi, a Sponsor Director of the company, has expressed his intention to transfer 9,000,000 shares of the company to his daughter Ms. Rifah Tasnia Swarna by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 17, 2024.

SKTRIMS

Refer to their earlier news disseminated by DSE on 14.07.2024, the company has further informed that the honorable High Court Division on 18.09.2024 has issued a stay order quashing order passed by the Metropolitan Sessions Judge Court on 11.07.2024 regarding freeze of bank account of the company. As per the stay order of honorable High Court Division, there is no problem on the Company's banking operations from now. The stay order will be valid till October 20, 2024.

KBPPWBIL

The company has informed that a Memorandum of Understanding (MOU) has been signed between Khan Brothers PP Woven Bag Industries Ltd. and BSB Cambrian Education Group on September 18, 2024 at the company's registered office, located at 15 DIT Road (10th Floor), Malibagh Chowdhurypara, Dhaka-1219. BSB Cambrian Education Group has voluntarily expressed their willingness to take over the management and operations of Khan Brothers PP Woven Bag Industries Ltd. This will be achieved through the acquisition of shares from the current Board of Directors at a negotiated value, thereby ensuring a seamless transition of responsibilities and control. To formalize this MOU has been duly executed and witnessed by authorized representatives of both the parties.

NAVANAPHAR

The company has informed that the Board of Directors has decided to appoint Professor Dr. Sarder A. Nayeem (Nominated Director of Stratus Holdings Limited) as Chairman of the company with effect from September 18, 2024.

DOMINAGE

A team of Dhaka Stock Exchange PLC. (DSE) visited the factory-01 and factory-02 situated respectively at Aukpara, Ashulia and at Palash, Narshingdi of Dominage Steel Building Systems Limited on September 17 & 19, 2024 to inspect their current operational status and found closed.

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