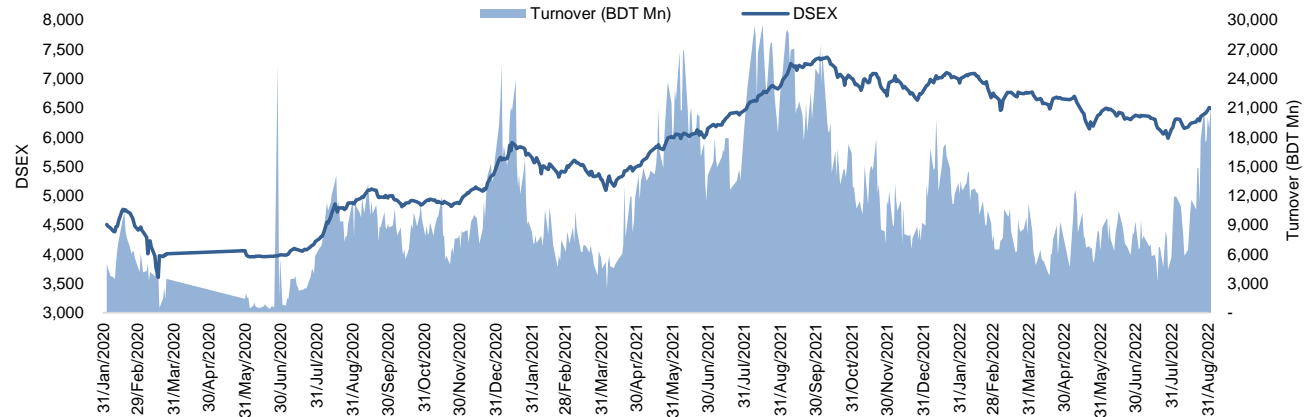


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.06%) lost 4.22 points and closed at 6,596.66. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (-0.21%), and the large-cap index CDSET (-0.21%) closed at 2,401.76, 1,448.38, and 1,304.46 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.25% followed by Engineering (-0.23%), Food & Allied (-0.21%), Bank (-0.19%), Telecommunication (-0.10%), Pharmaceutical (+0.07%), and NBF1 (+0.94%), respectively. Block trades contributed 0.7% of the overall market turnover. Bangladesh Export Import Company Ltd. (-0.2%) was the most traded share with a turnover of BDT 3,421 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,596.66	6,600.88	-4.22	-0.06%	-2.4%
DS30	2,401.76	2,406.11	-4.34	-0.18%	-5.2%
DSES	1,448.38	1,451.39	-3.01	-0.21%	+1.2%
CDSET	1,304.46	1,307.17	-2.71	-0.21%	-4.0%

	Advanced	Declined	Unchanged	Total
All Category	73	156	145	374
A Category (Equity)	50	113	92	255
B Category (Equity)	19	36	38	93
N Category (Equity)	3	1	2	6
Z Category (Equity)	1	6	13	20
Mutual Funds	1	1	28	30
Corporate Bonds	0	0	1	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,231,878	5,232,369	-0.0%
	Mn USD	50,391	50,396	
Turnover	Mn BDT	28,323	19,898	+42.3%
	Mn USD	273	192	
Volume	Mn Shares	430	303	+42.1%
No. of Trade		328,145	272,885	+20.3%

\* Average (buy and sell) Exchange Rate is BDT 103.83 as of Sep 20, 2022

Figure: Sectorial Turnover (BDT)

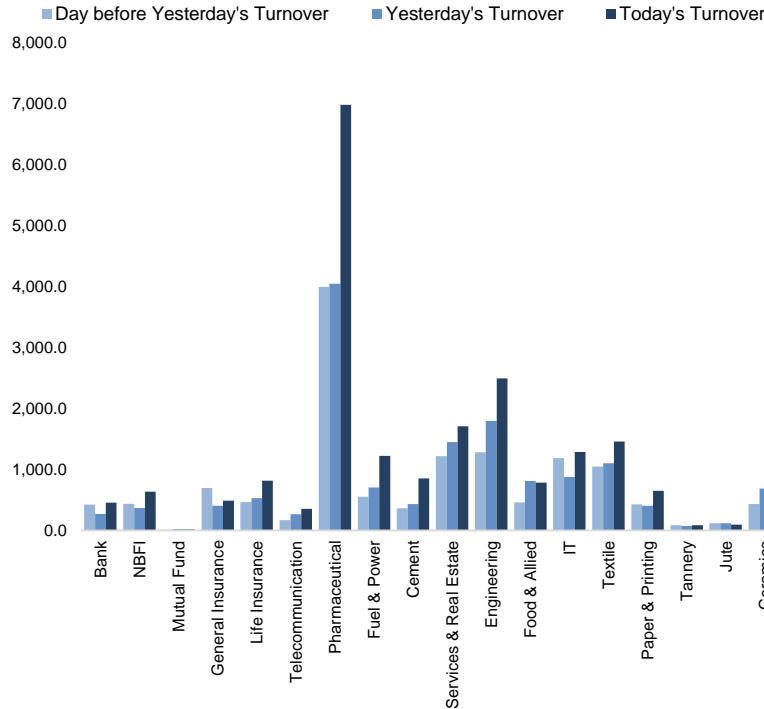
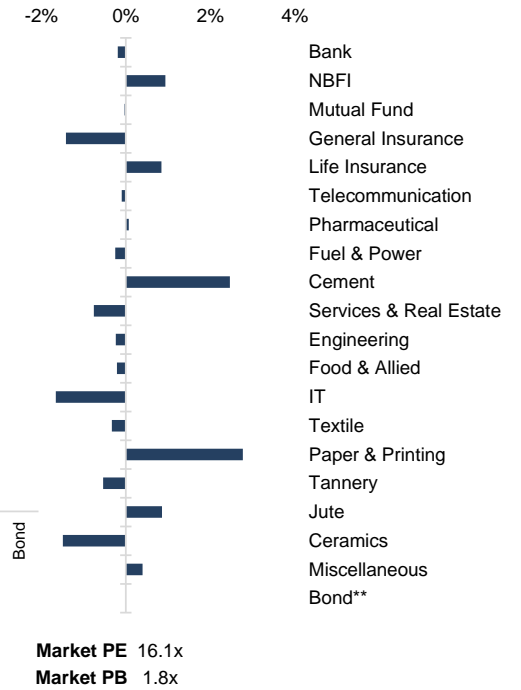


Figure: Sectorial Mcap Change



Market PE 16.1x  
Market PB 1.8x

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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	1,455	1,458	-2.74	-0.19%	33	668,333	14.4%	456.4	1.7%	7.8x	0.8x	GP	387,266	8.4%	91.5	11.4x	7.7x
NBFI	2,034	2,015	+18.94	+0.94%	23	198,023	4.3%	634.7	2.3%	NM	3.9x	WALTONHIL	317,378	6.9%	0.4	26.1x	3.1x
Mutual Fund	856	857	-0.25	-0.03%	36	37,611	0.8%	16.8	0.1%	NM	0.8x	BATBC	280,098	6.1%	42.0	18.1x	7.4x
General Insurance	3,208	3,254	-46.22	-1.42%	41	92,912	2.0%	486.7	1.8%	15.0x	1.5x	SQURPHARMA	186,066	4.0%	200.7	10.0x	1.9x
Life Insurance	2,476	2,456	+20.66	+0.84%	13	69,640	1.5%	817.6	3.0%	NM	NM	ROBI	157,138	3.4%	1.1	NM	2.4x
Telecommunication	4,972	4,977	-4.75	-0.10%	3	583,239	12.6%	354.5	1.3%	15.5x	4.6x	RENATA	139,694	3.0%	6.4	25.2x	4.9x
Pharmaceutical	4,056	4,053	+2.90	+0.07%	32	779,163	16.8%	6,984.8	25.8%	19.2x	2.8x	UPGDCL	135,707	2.9%	9.3	11.0x	4.1x
Fuel & Power	1,749	1,754	-4.39	-0.25%	23	457,792	9.9%	1,224.1	4.5%	11.6x	1.2x	BEXIMCO	122,685	2.7%	3,420.6	8.5x	1.6x
Cement	2,670	2,605	+64.29	+2.47%	7	130,090	2.8%	854.0	3.2%	28.3x	2.8x	LHBL	92,678	2.0%	774.3	23.8x	5.2x
Services & Real Estate	1,808	1,822	-13.84	-0.76%	8	68,581	1.5%	1,709.1	6.3%	85.0x	1.3x	BEACONPHAR	83,391	1.8%	202.8	89.1x	14.3x
Engineering	4,612	4,623	-10.84	-0.23%	42	538,683	11.6%	2,494.7	9.2%	20.3x	1.9x	BXPHERMA	82,843	1.8%	503.0	14.4x	2.1x
Food & Allied	21,508	21,553	-44.81	-0.21%	21	381,850	8.2%	785.1	2.9%	22.9x	8.0x	BERGERPBL	80,943	1.7%	3.7	26.3x	7.1x
IT	2,764	2,810	-46.55	-1.66%	11	35,449	0.8%	1,286.6	4.8%	28.8x	2.5x	MARICO	77,931	1.7%	3.7	22.2x	33.9x
Textile	1,677	1,682	-5.52	-0.33%	58	177,250	3.8%	1,456.8	5.4%	26.6x	1.1x	ICB	77,681	1.7%	7.2	44.0x	1.7x
Paper & Printing	10,901	10,607	+293.95	+2.77%	6	40,648	0.9%	651.1	2.4%	NM	2.8x	BRACBANK	57,619	1.2%	6.8	11.3x	1.0x
Tannery	3,155	3,172	-17.01	-0.54%	6	33,777	0.7%	83.7	0.3%	35.7x	3.3x	ISLAMIBANK	52,647	1.1%	4.0	10.8x	0.8x
Jute	11,020	10,926	+93.72	+0.86%	3	2,832	0.1%	92.4	0.3%	NM	40.0x	DUTCHBANGL	44,389	1.0%	12.6	7.7x	1.2x
Ceramics	758	769	-11.46	-1.49%	5	34,670	0.7%	748.6	2.8%	32.5x	2.1x	TITASGAS	41,349	0.9%	43.1	12.4x	0.6x
Miscellaneous	4,647	4,629	+18.39	+0.40%	15	266,455	5.8%	5,939.5	21.9%	13.0x	2.2x	POWERGRID	39,556	0.9%	80.9	10.8x	0.4x
Bond**	90	90	-	-	9	36,975	0.8%	3.2	0.0%	NM	NM	BSCCL	38,835	0.8%	261.8	16.8x	3.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CENTRALPHL	13.9	+9.4%	37.0	NM	2.2x
SPCL	95.2	+9.2%	580.7	12.7x	2.4x
UNIONCAP	11.2	+8.7%	29.2	NM	NM
BDCOM	47.3	+8.0%	414.8	31.6x	3.1x
SEAPEARL	103.9	+7.9%	140.7	NM	9.0x
IBP	22.3	+7.2%	161.0	21.9x	1.5x
BPML	77.9	+7.0%	409.1	28.7x	2x
ORIONINFU	583.1	+6.7%	294.9	NM	43.0x
JHRML	127.8	+6.0%	733.3	43.2x	4.2x
AAMRATECH	39.4	+5.6%	230.3	19.9x	1.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,743	6.9%	10.0x	1.9x
BEXIMCO	85,204	4.8%	8.5x	1.6x
BATBC	74,086	4.2%	18.1x	7.4x
RENATA	68,199	3.8%	25.2x	4.9x
BEACONPHAR	58,374	3.3%	89.1x	14.3x
BXPHERMA	57,841	3.3%	14.4x	2.1x
GP	38,727	2.2%	11.4x	7.7x
LHBL	32,734	1.8%	23.8x	5.2x
BRACBANK	30,976	1.7%	11.3x	1.0x
EBL	24,105	1.4%	7.6x	1.1x
ISLAMIBANK	23,649	1.3%	10.8x	0.8x
ORIONPHARM	23,031	1.3%	35.3x	1.8x
PUBALIBANK	19,370	1.1%	5.7x	0.7x
NBL	19,116	1.1%	NM	0.5x
CITYBANK	18,584	1.0%	4.9x	0.7x
OLYMPIC	16,349	0.9%	18.4x	2.9x
ROBI	15,714	0.9%	NM	2.4x
BSRMLTD	15,122	0.9%	5.2x	0.7x
ALARABANK	14,609	0.8%	12.0x	1.1x
IFIC	14,515	0.8%	12.6x	0.8x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	140.0	-0.2%	3,420.6	8.5x	1.6x
ORIONPHARM	144.7	+3.1%	3,272.5	35.3x	1.8x
BSC	160.8	+4.3%	1,554.5	11.9x	2.3x
ACMELAB	102.8	+5.3%	907.2	10.9x	1.0x
LHBL	79.8	+3.5%	774.3	23.8x	5.2x
JHRML	127.8	+6.0%	733.3	43.2x	4.2x
EHL	88.9	-4.3%	669.7	15.1x	1.2x
SPCL	95.2	+9.2%	580.7	12.7x	2.4x
SPCERAMICS	52.0	-3.0%	570.8	NM	1.6x
DELTALIFE	163.0	+4.0%	540.5	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BDWELDING	30.5	-9.2%	40.0	NM	2.7x
BIFC	11.4	-8.8%	10.5	NM	NM
STANCERAM	152.3	-8.3%	13.1	NM	20.5x
EGEN	53.1	-8.1%	57.1	31.6x	2.5x
ECABLES	203.0	-7.1%	97.7	NM	24.5x
NLTUBES	84.1	-6.0%	40.6	NM	0.6x
MIRACLEIND	35.2	-5.9%	59.2	NM	1.1x
GENEXIL	78.5	-5.4%	351.8	23.1x	4.2x
RSRMSTEEL	21.3	-5.3%	24.1	NM	0.5x
PAPERPROC	216.0	-5.3%	65.0	70.8x	7.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONPHARM	154.4	127.1	36.0	2,197	330.25
BEXIMCO	149.9	145.0	3.0	2,026	293.90
BDCOM	48.1	40.0	19.0	3,963	185.27
MARICO	2,450.0	2,450.0	20.0	49	120.54
HRTEX	127.5	127.5	6.0	558	71.08
NBL	9.1	9.1	2.0	4,100	37.31
SEAPEARL	100.0	88.0	19.0	381	35.74
RDFOOD	41.0	41.0	6.0	500	20.50
NAHEEACP	79.6	73.0	7.0	265	20.21
MALEKSPIN	42.0	40.0	4.0	355	14.48

\*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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ORIONPHARM	154.4	127.1	330.2	2,197	36
BEXIMCO	149.9	145.0	293.9	2,026	3
BDCOM	48.1	40.0	185.3	3,963	19
MARICO	2,450.0	2,450.0	120.5	49	20
HRTEX	127.5	127.5	71.1	558	6
NBL	9.1	9.1	37.3	4,100	2
SEAPEARL	100.0	88.0	35.7	381	19
RDFOOD	41.0	41.0	20.5	500	6
NAHEEACP	79.6	73.0	20.2	265	7
MALEKSPIN	42.0	40.0	14.5	355	4
MLDYEING	27.1	24.8	13.0	521	4
DGIC	44.5	44.5	8.9	200	1
IPDC	63.0	63.0	8.5	135	3
SAPORTL	33.1	33.1	6.9	210	1
AL-HAJTEX	143.0	135.0	6.9	50	2
METROSPIN	48.0	45.0	6.6	144	5
BSC	167.0	150.6	6.2	40	4
SUNLIFEINS	65.0	64.9	4.3	66	2
BATBC	518.8	518.8	3.8	7	1
BPML	74.4	74.4	3.7	50	2
ORIONINFU	570.0	540.0	3.6	6	3
GSPFINANCE	32.0	32.0	3.5	110	1
<b>Total</b>			<b>1,242.7</b>		<b>187</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Sandhani Life Insurance Company Ltd.	-	0.0%	12.0%	Record Date	21-Sep-22
Meghna Life Insurance Co. Ltd.	-	10.0%	15.0%	Record Date	25-Sep-22
Pragati Life Insurance Ltd.	-	6.0%	0.0%	Record Date	26-Sep-22
The IBN SINA Pharmaceutical Industry Ltd.	-	0.0%	60.0%	Record Date	29-Sep-22
Apex Tannery Limited	-	0.0%	10.0%	Record Date	3-Oct-22
Bay Leasing & Investment Limited	-	5.0%	0.0%	Record Date	6-Oct-22
Summit Power Limited	-	0.0%	20.0%	Record Date	6-Oct-22
Eastern Housing Limited	-	0.0%	20.0%	Record Date	12-Oct-22
Phoenix Finance and Investments Ltd.	-	0.0%	0.0%	Record Date	13-Oct-22
ADN Telecom Limited	-	0.0%	10.0%	Record Date	13-Oct-22
Bangladesh Industrial Fin. Co. Ltd.	-	0.0%	0.0%	Record Date	20-Oct-22
Meghna Insurance Company Limited	-	0.0%	3.0%	Record Date	24-Oct-22

**Important DSE News**
**CITYBANK**

Mr. Rajibul Huq Chowdhury, one of the Directors of the Company, has further informed that he has completed his sale of 12,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 17.08.2022.

**NORTHRNINS**

Al-Haj Abdus Samad, one of the Directors of the company, has expressed his intention to transfer his holdings 9,27,111 shares of the Company to his son Mr. Jawadul Alam Chowdhury (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

**IDLC**

The Board of Directors of the Company approved the issuance of Unsecured Non-Convertible Zero Coupon Bond amounting to BDT 5.0 billion (in Face value), tenor 2 years through private placement subject to the approval of regulatory authorities.

**SONARBAINS**

Mr. Sheikh Kabir Hossain, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 2,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 12.09.2022.

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