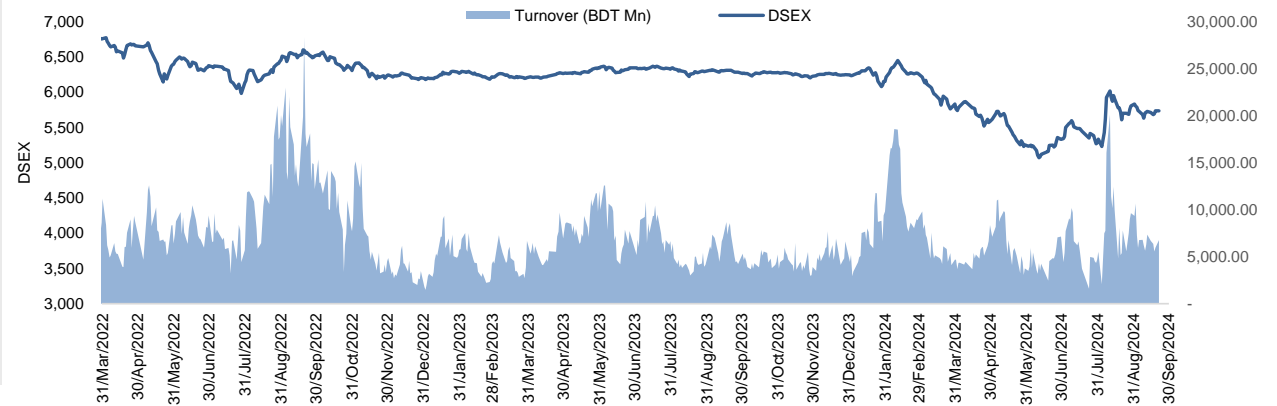


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.01%) lost 0.3 points and closed at 5,734.97. The blue-chip index DS30 (-0.55%), the Shariah-based index DSES (+0.45%), and the large-cap index CDSET (+0.21%) closed at 2,094.80, 1,263.48, and 1,142.15 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.46% followed by Engineering (-1.24%), Fuel & Power (-1.22%), Telecommunication (-1.14%), Pharmaceutical (-1.02%), Food & Allied (-0.93%), and Bank (+1.44%), respectively. Block trades contributed 7.3% of the overall market turnover. Agni Systems Ltd. (+1.5%) was the most traded share with a turnover of BDT 338 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,734.97	5,735.27	-0.30	-0.01%	-8.2%
DS30	2,094.80	2,106.44	-11.64	-0.55%	+0.0%
DSES	1,263.48	1,257.81	+5.66	+0.45%	-7.4%
CDSET	1,142.15	1,139.71	+2.44	+0.21%	-5.0%

	Advanced	Declined	Unchanged	Total
All Category	109	233	58	400
A Category (Equity)	69	138	33	240
B Category (Equity)	27	63	12	102
N Category (Equity)	1	3	0	4
Z Category (Equity)	12	29	13	54
Mutual Funds	9	14	14	37
Corporate Bonds	0	2	1	3
Treasury Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,933,847	6,955,716	-0.3%
	Mn USD	57,782	57,964	
Turnover	Mn BDT	6,757	5,948	+13.6%
	Mn USD	56	50	
Volume	Mn Shares	204	158	+28.8%
	No. of Trade	185,730	177,864	+4.4%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 22, 2024

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Figure: Sectorial Turnover (BDT Mn)

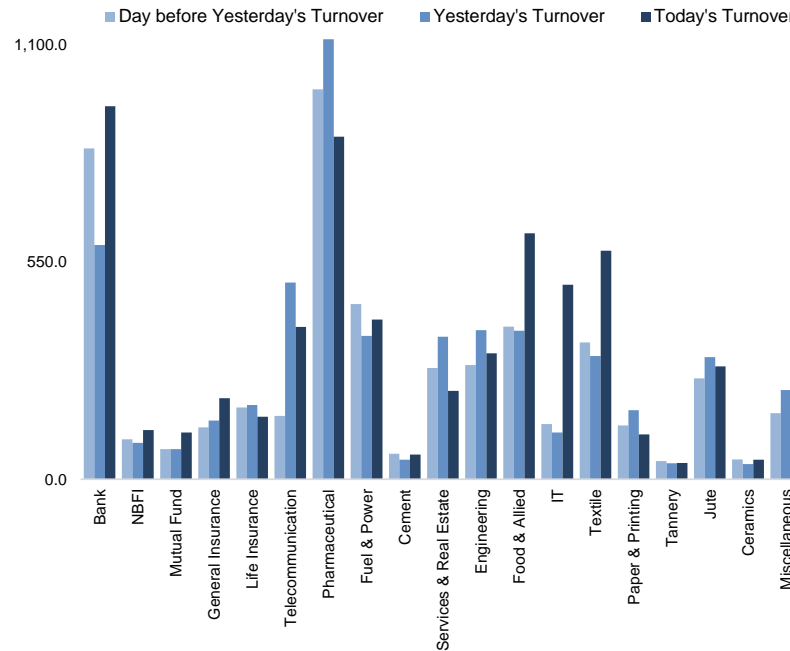
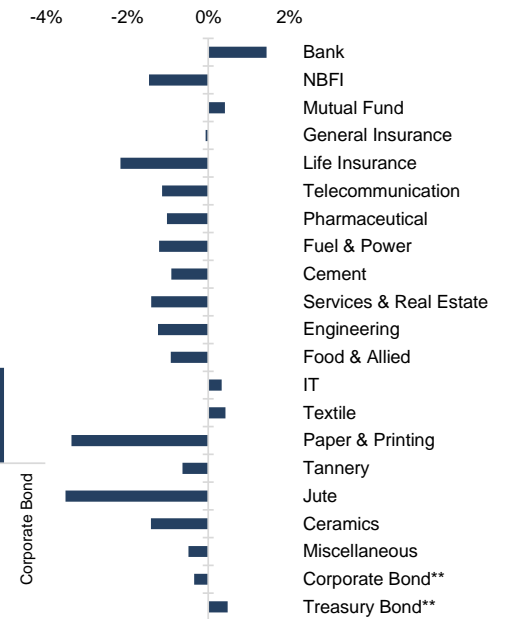


Figure: Sectorial Mcap Change



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	1,564	1,542	+22.22	+1.44%	36	749,266	10.8%	944.5	15.1%	8.1x	0.7x	GP	458,697	11.5%	289.5	13.0x	6.4x
NBFI	1,341	1,361	-19.90	-1.46%	23	129,832	1.9%	124.4	2.0%	NM	NM	BATBC	213,084	5.3%	66.4	12.1x	3.7x
Mutual Fund	640	637	+2.62	+0.41%	37	29,899	0.4%	118.4	1.9%	NM	0.6x	SQRPHARMA	202,731	5.1%	67.1	10.0x	1.7x
General Insurance	2,988	2,990	-2.01	-0.07%	43	86,553	1.2%	205.1	3.3%	15.7x	1.3x	WALTONHIL	191,117	4.8%	23.5	14.1x	1.7x
Life Insurance	2,289	2,339	-50.73	-2.17%	15	60,841	0.9%	158.1	2.5%	NM	NM	ROBI	149,281	3.7%	59.8	32.0x	2.3x
Telecommunication	5,478	5,541	-63.13	-1.14%	3	634,297	9.1%	385.3	6.2%	15.1x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,166	3,199	-32.50	-1.02%	34	600,733	8.6%	867.3	13.8%	16.1x	1.7x	BRACBANK	98,396	2.5%	171.0	10.1x	1.4x
Fuel & Power	1,264	1,280	-15.55	-1.22%	23	332,769	4.8%	404.2	6.5%	21.9x	0.7x	RENATA	87,513	2.2%	19.3	38.1x	2.7x
Cement	2,397	2,418	-21.94	-0.91%	7	114,452	1.6%	62.8	1.0%	18.5x	2.5x	ISLAMIBANK	87,422	2.2%	163.0	13.4x	1.2x
Services & Real Estate	1,274	1,292	-18.19	-1.41%	9	70,444	1.0%	223.5	3.6%	22.9x	0.5x	BERGERPBL	82,511	2.1%	0.3	25.5x	5.4x
Engineering	3,049	3,088	-38.24	-1.24%	42	352,307	5.1%	318.4	5.1%	14.5x	1.1x	LHBL	73,747	1.8%	11.0	15.5x	3.8x
Food & Allied	18,651	18,825	-174.50	-0.93%	21	342,424	4.9%	622.8	9.9%	18.0x	5.3x	MARICO	70,929	1.8%	6.6	14.2x	7.1x
IT	2,457	2,449	+8.15	+0.33%	11	32,323	0.5%	492.2	7.9%	26.7x	2.1x	ICB	59,234	1.5%	4.5	NM	1.4x
Textile	1,265	1,260	+5.35	+0.42%	58	131,249	1.9%	578.2	9.2%	NM	0.9x	UNILEVERCL	52,814	1.3%	5.2	59.5x	24.1x
Paper & Printing	5,408	5,597	-188.77	-3.37%	6	24,810	0.4%	113.4	1.8%	38.7x	1.1x	DUTCHBANGL	48,335	1.2%	13.4	6.3x	1.0x
Tannery	2,270	2,284	-14.57	-0.64%	6	24,857	0.4%	40.9	0.7%	43.0x	2.3x	OLYMPIC	37,269	0.9%	50.5	22.3x	3.6x
Jute	17,857	18,509	-651.77	-3.52%	3	4,184	0.1%	285.6	4.6%	NM	NM	POWERGRID	36,370	0.9%	2.2	NM	0.2x
Ceramics	447	453	-6.42	-1.42%	5	19,837	0.3%	49.5	0.8%	52.9x	1.2x	EBL	35,583	0.9%	13.5	5.1x	0.8x
Miscellaneous	4,270	4,291	-20.97	-0.49%	15	232,657	3.3%	241.4	3.9%	39.4x	1.8x	BXPHARMA	32,789	0.8%	26.1	6.2x	0.7x
Corporate Bond**	8,044	8,072	-28.08	-0.35%	16	35,242	0.5%	0.3	0.0%	NM	NM	BEACONPHAR	32,479	0.8%	50.3	72.1x	5.3x
Treasury Bond**	376	374	+1.80	+0.48%	237	2,954,249	42.4%	28.0	0.4%	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
ISLAMIBANK	54.3	+9.9%	163.0	13.4x	1.2x	SQRPHARMA	117,112	8.6%	10.0x	1.7x	AGNISYSL	34.7	+1.5%	338.4	32.4x	2.1x
KTL	15.7	+9.8%	60.5	82.6x	0.9x	BEXIMCO	69,460	5.1%	NM	1.2x	LOVELLO	87.3	+8.0%	293.9	63.3x	6.6x
ISLAMICFIN	15.2	+9.4%	32.4	NM	1.4x	BATBC	45,948	3.4%	12.1x	3.7x	GP	339.7	-1.1%	289.5	13.0x	6.4x
LOVELLO	87.3	+8.0%	293.9	63.3x	6.6x	RENATA	35,002	2.6%	38.1x	2.7x	SONALIANS	320.8	-3.8%	284.8	37.4x	4.8x
MEGCONMILK	29.0	+6.2%	2.7	NM	NM	ISLAMIBANK	33,649	2.5%	13.4x	1.2x	LINDEBD	1,480.7	+0.9%	207.4	39.3x	3.6x
GENEXIL	45.1	+5.6%	73.4	17.4x	2.3x	BXPHARMA	32,479	2.4%	6.2x	0.7x	BRACBANK	55.6	+1.3%	171.0	10.1x	1.4x
FBFIF	3.8	+5.6%	16.2	NM	0x	BRACBANK	32,157	2.4%	10.1x	1.4x	ISLAMIBANK	54.3	+9.9%	163.0	13.4x	1.2x
RAHIMTEXT	140.0	+5.3%	4.4	NM	5.7x	GP	30,004	2.2%	13.0x	6.4x	SAIHAMCOT	18.5	+4.5%	113.2	19.5x	0.5x
RENWICKJA	789.4	+4.6%	0.0	NM	NM	LHBL	24,690	1.8%	15.5x	3.8x	KBPWBIL	166.0	-3.3%	112.1	NM	14.0x
SAIHAMCOT	18.5	+4.5%	113.2	19.5x	0.5x	EBL	24,199	1.8%	5.1x	0.8x	IBNSINA	346.7	-1.1%	110.5	15.7x	3.2x

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	85.1	-9.9%	10.5	NM	9.4x	AIL	86.9	86.0	10.0	1,376	118.99
FIRSTFIN	3.9	-7.1%	0.5	NM	NM	LOVELLO	85.5	76.0	14.0	1,287	104.42
SPCERAMICS	16.2	-6.9%	28.2	73.6x	0.5x	AGNISYSL	35.5	33.0	4.0	2,040	69.34
DOMINAGE	12.9	-6.5%	31.7	NM	0.8x	BEACHHATCH	92.0	87.0	27.0	531	47.56
QUASEMIND	38.6	-5.9%	22.3	39.4x	1.4x	ISLAMIINS	40.5	40.5	3.0	772	31.26
SONALIPAPR	182.0	-5.8%	84.8	NM	1.1x	PRAGATILIF	249.0	215.7	8.0	110	25.41
LIBRAINFU	926.9	-5.4%	60.3	NM	1.1x	1STPRIMFMF	35.0	34.7	28.0	708	24.72
SONALILIFE	62.4	-5.3%	11.3	NM	NM	BEXIMCO	108.1	104.1	25.0	126	13.39
EBLNRBMF	3.8	-5.0%	2.2	NM	0.4x	NBL	6.3	6.3	1.0	1,400	8.82
NTC	350.5	-5.0%	1.1	NM	NM	JHRML	75.0	75.0	1.0	101	7.57

* 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
AIL	86.9	86.0	119.0	1,376	10
LOVELLO	85.5	76.0	104.4	1,287	14
AGNISYSL	35.5	33.0	69.3	2,040	4
BEACHHATCH	92.0	87.0	47.6	531	27
ISLAMIINS	40.5	40.5	31.3	772	3
PRAGATILIF	249.0	215.7	25.4	110	8
1STPRIMFMM	35.0	34.7	24.7	708	28
BEXIMCO	108.1	104.1	13.4	126	25
NBL	6.3	6.3	8.8	1,400	1
JHRML	75.0	75.0	7.6	101	1
DOMINAGE	12.5	12.5	5.0	400	7
BRACBANK	57.0	53.5	4.7	85	3
CENTRALINS	45.0	45.0	3.7	82	1
CRYSTALINS	68.0	68.0	3.5	52	1
FINEFOODS	175.0	175.0	3.5	20	1
BATBC	433.9	364.1	2.7	7	2
BANKASIA	17.7	17.7	2.0	115	1
BANKASIA	17.7	17.7	2.0	115	1
UTTARABANK	19.8	19.8	2.0	100	1
OLYMPIC	203.0	203.0	1.8	9	1
ABB1STMF	3.4	3.4	1.6	460	1
ARGONDENIM	19.2	19.2	1.5	79	1
Total			493.0		154

Important DSE News
SAMATALETH

(Q2 Un-audited): EPS was Tk. (0.26) for October-December 2023 as against Tk. (0.04) for October-December 2022; EPS was Tk. (0.22) for July-December 2023 as against Tk. (0.05) for July-December 2022. NOCFPS was Tk. (0.08) for July-December 2023 as against Tk. (0.07) for July-December 2022. NAV per share was Tk. 14.11 as on December 31, 2023 and Tk. 14.34 as on June 30, 2023.

CVOPRL

The Board of Directors has recommended 10.00% cash dividend for all shareholders for the year ended on 30-Jun-2024. Date of AGM: 11-Dec-2024, Time: 11:00 AM, Venue: Hybrid (The AGM venue details will be conveyed through the AGM notice). Record Date: 31-Oct-2024. The Company has also reported EPS of Tk. 2.34, NAV per share of Tk. 10.31 and NOCFPS of Tk. 2.77 for the year ended on 30-Jun-2024 as against Tk. 0.46, Tk. 8.27 and Tk. 1.42 respectively for the same period of the previous year.

ISLAMIINS

Ms. Shahana Hanif, a Director of the Company, has expressed her intention to buy 7,86,726 shares of the Company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within October 31, 2024.

QUASEMIND

The Board of Directors of the company in its meeting held on September 19, 2024 has decided to terminate the below service agreements with the following companies: 01. Quasem Lamps Limited (Date of Termination: October 01, 2024), 02. Quasem Food Products Limited (Date of Termination: October 01, 2024) and 03. Sunlite Trading and Services Limited (Date of Termination: October 01, 2024). As a result of termination of the said service agreements both the income from service and related selling & distribution expenses of the company will be decreased.

UCB

Ms. Sultana Hashem, one of the Sponsors of the Company, has informed that she will receive 1,198,763 shares from her husband Late M.A. Hashem, as a successor as per succession certificate issued by the Honorable Court.

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
CVOPRL		0.0%	10%	Record Date	31-Oct-24

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