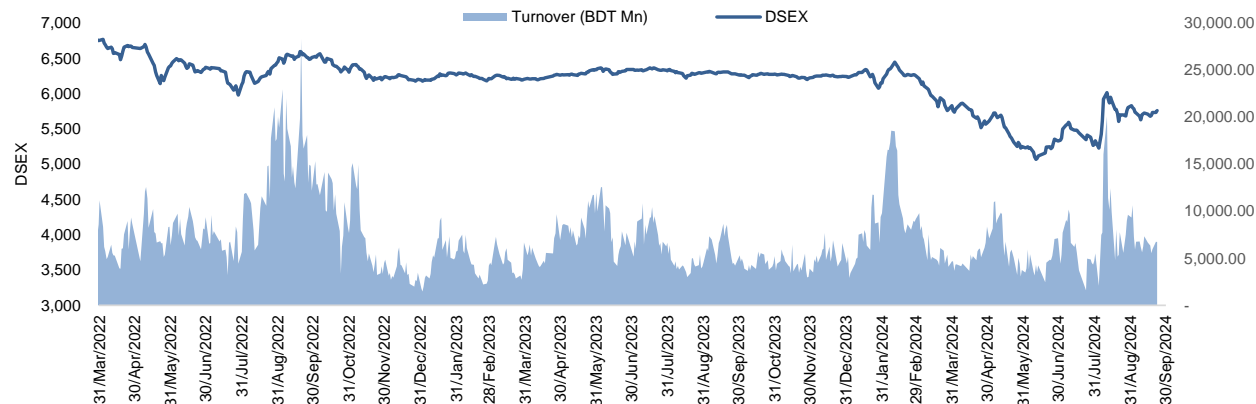


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.44%) gained 25.42 points and closed at 5,760.39. The blue-chip index DS30 (+0.10%), the Shariah-based index DSES (+0.82%), and the large-cap index CDSET (+1.08%) closed at 2,096.97, 1,273.82, and 1,154.51 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 2.18%, followed by NBF1 (+1.07%), Telecommunication (+0.94%), Pharmaceutical (-0.26%), Food & Allied (-0.37%), Fuel & Power (-1.08%), and Engineering (-1.19%), respectively. Block trades contributed 7.2% of the overall market turnover. BRAC Bank Ltd. (+1.3%) was the most traded share with a turnover of BDT 442 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,760.39	5,734.97	+25.42	+0.44%	-7.8%
DS30	2,096.97	2,094.80	+2.17	+0.10%	+0.1%
DSES	1,273.82	1,263.48	+10.34	+0.82%	-6.6%
CDSET	1,154.51	1,142.15	+12.36	+1.08%	-4.0%

	Advanced	Declined	Unchanged	Total
All Category	112	237	49	398
A Category (Equity)	73	132	34	239
B Category (Equity)	24	73	5	102
N Category (Equity)	2	2	0	4
Z Category (Equity)	13	30	10	53
Mutual Funds	4	17	16	37
Corporate Bonds	2	0	1	3
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,944,509	6,933,847	+0.2%
	Mn USD	57,871	57,782	
Turnover	Mn BDT	6,744	6,757	-0.2%
	Mn USD	56	56	
Volume	Mn Shares	223	204	+9.5%
No. of Trade		178,598	185,730	-3.8%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 23, 2024

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

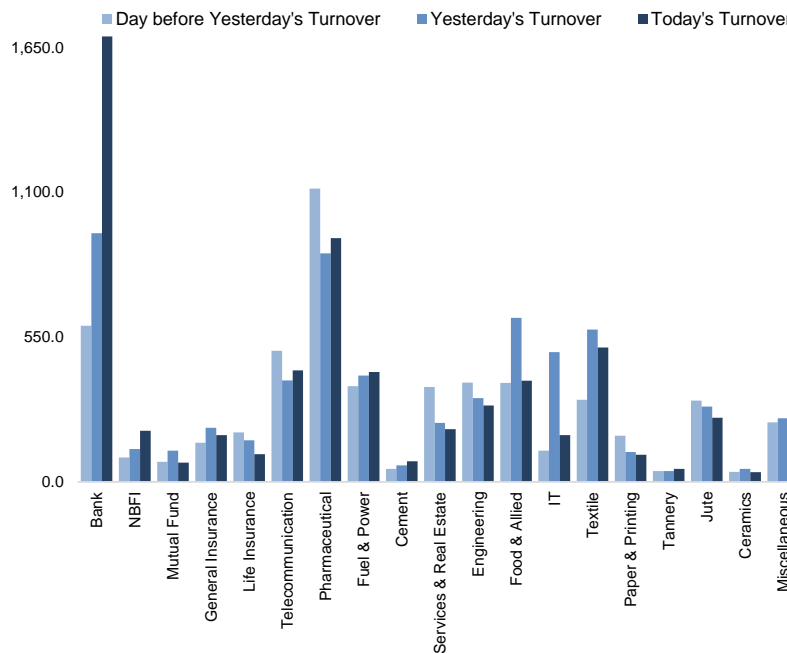
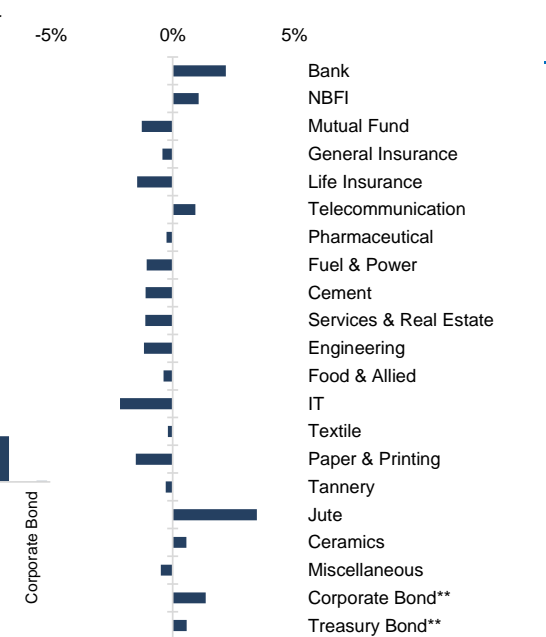


Figure: Sectorial Mcap Change



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	1,598	1,564	+34.13	+2.18%	36	765,614	11.0%	1,691.1	27.0%	8.3x	0.8x	GP	462,883	11.6%	217.7	13.1x	6.4x
NBFI	1,356	1,341	+14.34	+1.07%	23	131,220	1.9%	194.1	3.1%	NM	NM	BATBC	212,544	5.3%	40.0	12.1x	3.7x
Mutual Fund	632	640	-8.16	-1.27%	37	29,518	0.4%	73.2	1.2%	NM	0.6x	SQRUPHARMA	203,352	5.1%	86.8	10.0x	1.7x
General Insurance	2,976	2,988	-12.56	-0.42%	43	86,189	1.2%	177.6	2.8%	15.7x	1.3x	WALTONHIL	189,027	4.7%	18.0	13.9x	1.6x
Life Insurance	2,255	2,289	-33.41	-1.46%	15	59,953	0.9%	104.8	1.7%	NM	NM	ROBI	151,376	3.8%	94.5	32.5x	2.4x
Telecommunication	5,530	5,478	+51.40	+0.94%	3	640,248	9.2%	423.7	6.8%	15.3x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,158	3,166	-8.18	-0.26%	34	599,181	8.6%	925.6	14.8%	16.0x	1.7x	BRACBANK	99,635	2.5%	441.5	10.2x	1.4x
Fuel & Power	1,250	1,264	-13.59	-1.08%	23	329,190	4.7%	417.0	6.7%	21.6x	0.7x	ISLAMIBANK	94,506	2.4%	179.7	14.5x	1.3x
Cement	2,370	2,397	-26.79	-1.12%	7	113,172	1.6%	78.4	1.3%	18.3x	2.5x	RENATA	87,123	2.2%	82.4	38.0x	2.7x
Services & Real Estate	1,260	1,274	-14.33	-1.12%	9	69,652	1.0%	200.6	3.2%	22.6x	0.5x	BERGERPBL	82,664	2.1%	3.4	25.6x	5.4x
Engineering	3,013	3,049	-36.20	-1.19%	42	348,124	5.0%	290.0	4.6%	14.3x	1.1x	LHBL	72,818	1.8%	22.5	15.3x	3.8x
Food & Allied	18,581	18,651	-69.50	-0.37%	21	341,148	4.9%	384.0	6.1%	18.0x	5.3x	MARICO	70,834	1.8%	5.9	14.2x	7.1x
IT	2,404	2,457	-53.12	-2.16%	11	31,625	0.5%	177.8	2.8%	26.1x	2.0x	ICB	59,407	1.5%	9.1	NM	1.4x
Textile	1,263	1,265	-2.47	-0.20%	58	130,993	1.9%	509.8	8.1%	NM	0.9x	UNILEVERCL	52,958	1.3%	18.1	59.7x	24.2x
Paper & Printing	5,326	5,408	-81.83	-1.51%	6	24,434	0.4%	102.6	1.6%	38.1x	1.1x	DUTCHBANGL	48,950	1.2%	20.9	6.4x	1.0x
Tannery	2,263	2,270	-6.50	-0.29%	6	24,786	0.4%	49.6	0.8%	42.9x	2.3x	OLYMPIC	36,929	0.9%	38.0	22.1x	3.6x
Jute	18,476	17,857	+618.98	+3.47%	3	4,329	0.1%	243.3	3.9%	NM	NM	POWERGRID	36,370	0.9%	0.8	NM	0.2x
Ceramics	449	447	+2.54	+0.57%	5	19,949	0.3%	37.2	0.6%	53.2x	1.2x	EBL	35,719	0.9%	9.0	5.1x	0.8x
Miscellaneous	4,249	4,270	-20.76	-0.49%	15	231,526	3.3%	173.1	2.8%	39.2x	1.8x	BXPHARMA	33,146	0.8%	41.0	6.2x	0.7x
Corporate Bond**	8,153	8,044	+108.92	+1.35%	16	35,399	0.5%	3.9	0.1%	NM	NM	CITYBANK	32,061	0.8%	125.4	4.9x	0.8x
Treasury Bond**	378	376	+2.14	+0.57%	237	2,957,751	42.4%	0.8	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	
RAHIMTEXT	154.0	+10.0%	16.9	NM	6.3x	SQRUPHARMA	117,112	8.6%	10.0x	1.7x	BRACBANK	56.3	+1.3%	441.5	10.2x	1.4x	
ISLAMINS	46.5	+9.9%	18.7	15.2x	2.1x	BEXIMCO	69,460	5.1%	NM	1.2x	LINDEBD	1,434.4	-3.1%	246.7	38.1x	3.5x	
ISLAMICFIN	16.7	+9.9%	57.3	NM	1.5x	BATBC	45,948	3.4%	12.1x	3.7x	SONALIANSH	333.6	+4.0%	242.7	38.9x	5.0x	
SIBL	11.6	+9.4%	145.1	6.0x	0.5x	RENATA	35,002	2.6%	38.0x	2.7x	GP	342.8	+0.9%	217.7	13.1x	6.4x	
ISLAMIBANK	58.7	+8.1%	179.7	14.5x	1.3x	ISLAMIBANK	33,649	2.5%	14.5x	1.3x	ISLAMIBANK	58.7	+8.1%	179.7	14.5x	1.3x	
TAMIJTEX	147.5	+8.1%	14.0	22.2x	1.6x	BXPHARMA	32,479	2.4%	6.2x	0.7x	SIBL	11.6	+9.4%	145.1	6.0x	0.5x	
FIRSTFIN	4.2	+7.7%	0.1	NM	NM	BRACBANK	32,157	2.4%	10.2x	1.4x	TECHNODRUG	47.1	+5.4%	137.5	NM	1.6x	
AIL	105.2	+7.7%	73.7	42.6x	4.4x	GP	30,004	2.2%	13.1x	6.4x	CITYBANK	23.8	+3.0%	125.4	4.9x	0.8x	
FIRSTSBANK	7.4	+7.2%	52.9	3.1x	0.3x	LHBL	24,690	1.8%	15.3x	3.8x	LOVELLO	85.0	-2.6%	121.2	61.6x	6.4x	
DSHGARME	89.8	+6.3%	5.8	NM	4.9x	EBL	24,199	1.8%	5.1x	0.8x	BSCPLC	157.6	-1.3%	111.6	13.4x	1.7x	
						PUBALIBANK	20,448	1.5%	3.5x	0.6x							
						NBL	16,930	1.2%	NM	1.7x							
						CITYBANK	16,830	1.2%	4.9x	0.8x							
						BSRMLTD	14,210	1.0%	4.4x	0.6x							
						ALARABANK	13,534	1.0%	10.5x	1.1x							
						PRIMEBANK	12,985	1.0%	4.8x	0.8x							
						OLYMPIC	12,616	0.9%	22.1x	3.6x							
						UTTARABANK	11,350	0.8%	12.3x	0.8x							
						ORIONPHARM	11,317	0.8%	10.0x	0.5x							
						ROBI	10,738	0.8%	32.5x	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	79.2	-6.9%	8.6	NM	8.7x						ENVOYTEX	50.0	50.0	1.0	3,600	180.00	
KBPPWBIL	156.8	-5.5%	53.0	NM	13x						BNICL	39.8	39.8	2.0	1,781	70.88	
GHCL	30.0	-5.1%	22.8	NM	0.7x						AL-HAJTEX	146.0	136.0	4.0	328	45.40	
RSRMSTEEL	13.2	-5.0%	0.9	NM	0.3x						PEOPLESINS	36.5	36.5	2.0	797	29.09	
MIRAKHTER	42.4	-4.9%	6.7	12.1x	0.8x						SUNLIFEINS	63.0	54.1	6.0	395	23.30	
BDTHAI	13.9	-4.8%	17.1	NM	0.5x						LOVELLO	85.6	78.9	9.0	267	22.26	
GBBPOWER	8.1	-4.7%	1.0	NM	0.4x						CENTRALINS	42.7	42.7	1.0	500	21.35	
BBSCABLES	22.6	-4.6%	12.8	NM	0.7x						BEACHHATCH	100.5	86.5	7.0	137	12.60	
BEACONPHAR	134.3	-4.5%	32.1	68.9x	5.1x						RELIANCE1	19.1	19.0	5.0	553	10.54	
ICBSONALI1	6.5	-4.4%	14.8	NM	1.0x						KBPPWBIL	150.2	150.2	5.0	64	9.62	

* 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
ENVOYTEX	50.0	50.0	180.0	3,600	1
BNICL	39.8	39.8	70.9	1,781	2
AL-HAJTEX	146.0	136.0	45.4	328	4
PEOPLESINS	36.5	36.5	29.1	797	2
SUNLIFEINS	63.0	54.1	23.3	395	6
LOVELLO	85.6	78.9	22.3	267	9
CENTRALINS	42.7	42.7	21.4	500	1
BEACHHATCH	100.5	86.5	12.6	137	7
RELIANCE1	19.1	19.0	10.5	553	5
KBPPWBIL	150.2	150.2	9.6	64	5
NBL	6.3	6.3	8.8	1,400	1
BEXIMCO	106.8	104.1	8.2	78	16
BRACBANK	56.0	56.0	6.8	121	2
RUPALILIFE	108.0	108.0	4.3	40	1
1STPRIMFMF	35.0	35.0	4.0	115	5
SAIFPOWER	18.5	18.5	3.5	190	1
MARICO	2,251.0	2,251.0	3.4	2	3
MARICO	2,251.0	2,251.0	3.4	2	3
BIFC	7.5	7.5	3.1	408	1
SONALIANS	326.5	326.5	1.8	6	1
BDTHAI	14.8	14.8	1.5	100	1
ORIONINFU	395.0	395.0	1.4	3	1
Total			485.8		92

Important DSE News

SHAHJABANK

Mr. Tofazzal Hossain, a Sponsor of the Company, has expressed his intention to sell 7,00,000 shares out of his total holding of 1,49,43,225 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. (DSE) within October 31, 2024.

WALTONHIL

Mr. S. M. Mahbul Alam, a Sponsor Director of the company, has expressed his intention to transfer a total of 14,500,000 shares of the company comprising 6,060,000 shares to his daughter Ms. Nishat Tasnim Shuchi, 6,060,000 shares to his son Mr. Shadman Sakib Dipro and 2,380,000 shares to his spouse Ms. Zakia Sultana by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 22, 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
CVOPRL		0.0%	10%	Record Date	31-Oct-24

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