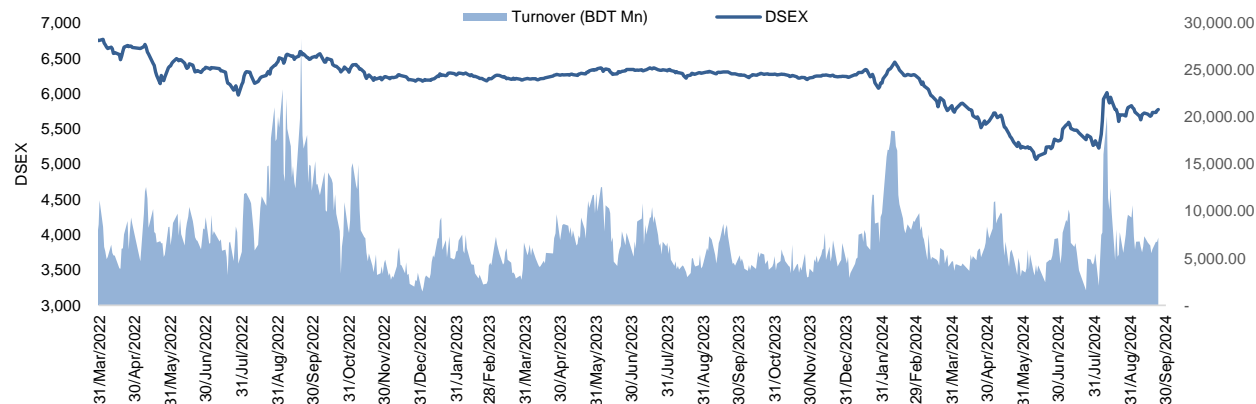


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.30%) gained 17.57 points and closed at 5,777.96. The blue-chip index DS30 (+0.60%), the Shariah-based index DSES (+1.12%), and the large-cap index CDSET (+1.01%) closed at 2,109.45, 1,288.13, and 1,166.14 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 1.54%, followed by Food & Allied (+1.03%), Bank (+0.09%), Pharmaceutical (+0.07%), Fuel & Power (-1.03%), Engineering (-1.06%), and NBF1 (-1.49%), respectively. Block trades contributed 1.9% of the overall market turnover. Grameenphone Ltd. (+1.9%) was the most traded share with a turnover of BDT 600 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,777.96	5,760.39	+17.57	+0.30%	-7.5%
DS30	2,109.45	2,096.97	+12.49	+0.60%	+0.7%
DSES	1,288.13	1,273.82	+14.30	+1.12%	-5.6%
CDSET	1,166.14	1,154.51	+11.63	+1.01%	-3.0%

	Advanced	Declined	Unchanged	Total
All Category	93	262	40	395
A Category (Equity)	67	146	22	235
B Category (Equity)	13	82	7	102
N Category (Equity)	0	4	0	4
Z Category (Equity)	13	30	11	54
Mutual Funds	21	7	7	35
Corporate Bonds	2	0	0	2
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,943,702	6,944,509	-0.0%
	Mn USD	57,864	57,871	-0.0%
Turnover	Mn BDT	7,186	6,744	+6.6%
	Mn USD	60	56	+6.6%
Volume	Mn Shares	212	223	-5.0%
No. of Trade		193,628	178,598	+8.4%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 24, 2024

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Figure: Sectorial Turnover (BDT Mn)

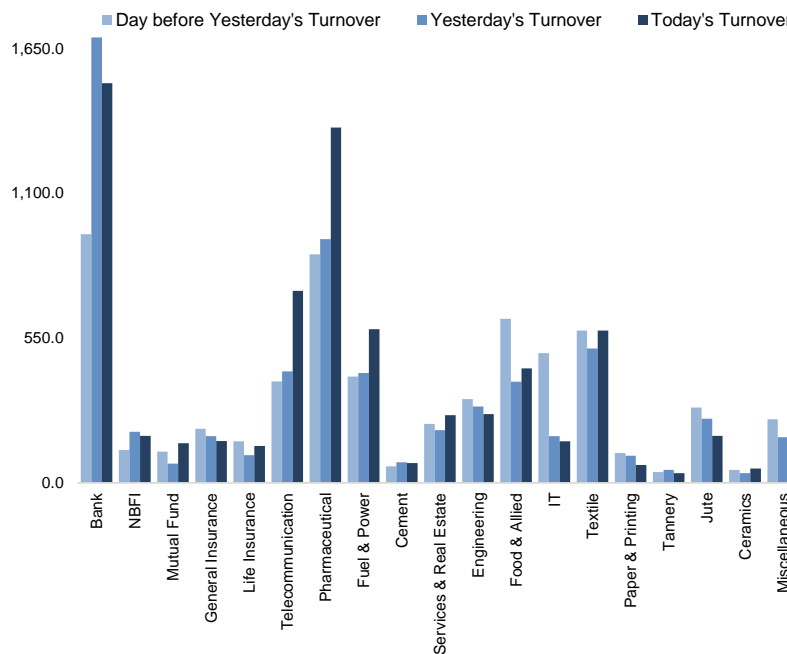
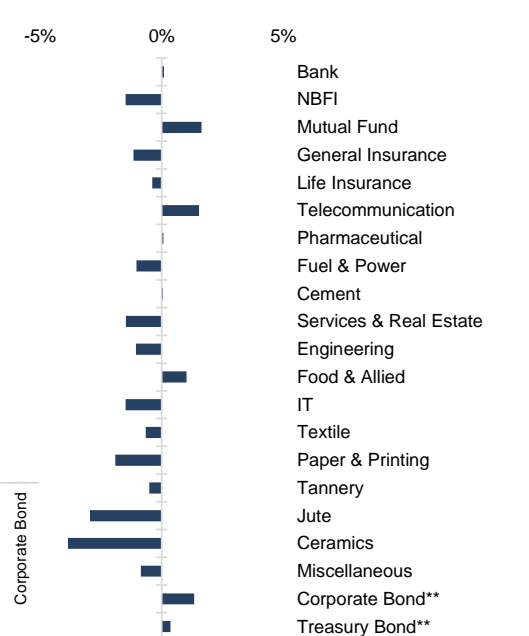


Figure: Sectorial Mcap Change



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	1,600	1,598	+1.49	+0.09%	36	766,326	11.0%	1,517.7	21.5%	8.3x	0.8x	GP	471,795	11.8%	599.7	13.4x	6.6x
NBFI	1,335	1,356	-20.14	-1.49%	23	129,271	1.9%	178.4	2.5%	NM	NM	BATBC	214,812	5.4%	63.7	12.2x	3.7x
Mutual Fund	642	632	+10.32	+1.63%	37	30,000	0.4%	151.0	2.1%	NM	0.6x	SQRUPHARMA	203,263	5.1%	85.0	10.0x	1.7x
General Insurance	2,941	2,976	-34.51	-1.16%	43	85,190	1.2%	158.4	2.2%	15.5x	1.3x	WALTONHIL	187,694	4.7%	17.8	13.8x	1.6x
Life Insurance	2,246	2,255	-8.65	-0.38%	15	59,723	0.9%	139.8	2.0%	NM	NM	ROBI	153,471	3.8%	100.6	32.9x	2.4x
Telecommunication	5,615	5,530	+85.10	+1.54%	3	650,101	9.3%	729.7	10.3%	15.5x	4.3x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,160	3,158	+2.34	+0.07%	34	599,624	8.6%	1,348.8	19.1%	16.0x	1.7x	ISLAMIBANK	103,039	2.6%	290.8	15.8x	1.4x
Fuel & Power	1,237	1,250	-12.93	-1.03%	23	325,786	4.7%	583.3	8.3%	21.4x	0.7x	BRACBANK	99,458	2.5%	409.3	10.2x	1.4x
Cement	2,371	2,370	+1.28	+0.05%	7	113,233	1.6%	74.9	1.1%	18.3x	2.5x	RENATA	87,055	2.2%	16.3	37.9x	2.7x
Services & Real Estate	1,241	1,260	-18.51	-1.47%	9	68,629	1.0%	257.1	3.6%	22.3x	0.5x	BERGERPBL	82,511	2.1%	0.9	25.5x	5.4x
Engineering	2,981	3,013	-31.91	-1.06%	42	344,437	4.9%	261.2	3.7%	14.2x	1.1x	LHBL	72,354	1.8%	13.2	15.2x	3.8x
Food & Allied	18,772	18,581	+190.73	+1.03%	21	344,650	4.9%	434.8	6.2%	18.1x	5.4x	MARICO	71,518	1.8%	15.3	14.3x	7.2x
IT	2,368	2,404	-35.76	-1.49%	11	31,154	0.4%	158.0	2.2%	25.7x	2.0x	ICB	57,846	1.4%	4.8	NM	1.4x
Textile	1,254	1,263	-8.29	-0.66%	58	130,133	1.9%	577.9	8.2%	NM	0.9x	UNILEVERCL	53,459	1.3%	96.0	60.2x	24.4x
Paper & Printing	5,224	5,326	-101.77	-1.91%	6	23,968	0.3%	68.1	1.0%	37.4x	1.0x	DUTCHBANGL	47,984	1.2%	8.9	6.3x	1.0x
Tannery	2,252	2,263	-11.53	-0.51%	6	24,660	0.4%	36.7	0.5%	42.7x	2.3x	OLYMPIC	38,428	1.0%	56.3	23.0x	3.7x
Jute	17,930	18,476	-545.47	-2.95%	3	4,202	0.1%	178.7	2.5%	NM	NM	EBL	35,583	0.9%	11.6	5.1x	0.8x
Ceramics	442	449	-17.32	-3.85%	5	19,181	0.3%	54.3	0.8%	51.1x	1.2x	POWERGRID	34,999	0.9%	11.6	NM	0.2x
Miscellaneous	4,213	4,249	-36.35	-0.86%	15	229,545	3.3%	143.7	2.0%	38.8x	1.8x	BEACONPHAR	33,611	0.8%	73.8	74.6x	5.5x
Corporate Bond**	8,262	8,153	+109.20	+1.34%	16	35,552	0.5%	0.2	0.0%	NM	NM	BXPHARMA	32,388	0.8%	50.7	6.1x	0.7x
Treasury Bond**	379	378	+1.38	+0.36%	237	2,954,465	42.4%	0.2	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
HAMI	87.1	+10.0%	4.0	NM	9.6x	SQRUPHARMA	117,112	8.6%	10.0x	1.7x	GP	349.4	+1.9%	599.7	13.4x	6.6x
GRAMENS2	14.6	+9.8%	23.4	NM	0.9x	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	56.2	-0.2%	409.3	10.2x	1.4x
ISLAMIBANK	64.0	+9.0%	290.8	15.8x	1.4x	BATBC	45,948	3.4%	12.2x	3.7x	LINDEBD	1,422.0	-0.9%	389.1	37.7x	3.5x
BEACONPHAR	145.5	+8.3%	73.8	74.6x	5.5x	RENATA	35,002	2.6%	37.9x	2.7x	IBNSINA	374.1	+6.6%	360.0	16.9x	3.5x
TAMIJTEX	157.6	+6.8%	25.7	23.7x	1.7x	ISLAMIBANK	33,649	2.5%	15.8x	1.4x	ISLAMIBANK	64.0	+9.0%	290.8	15.8x	1.4x
IBNSINA	374.1	+6.6%	360.0	16.9x	3.5x	BXPHARMA	32,479	2.4%	6.1x	0.7x	ACMELAB	88.9	+2.4%	210.3	7.8x	0.8x
DBH1STMF	5.3	+6.0%	0.7	NM	1x	BRACBANK	32,157	2.4%	10.2x	1.4x	SONALIANS	322.5	-3.3%	178.2	37.6x	4.8x
GLDNJMF	9.9	+5.3%	17.9	NM	1.0x	GP	30,004	2.2%	13.4x	6.6x	ROBI	29.3	+1.4%	100.6	32.9x	2.4x
HEIDELBCEM	306.5	+4.8%	14.5	43.0x	4.2x	LHBL	24,690	1.8%	15.2x	3.8x	TECHNODRUG	45.2	-4.0%	100.1	NM	1.5x
DSHGARME	93.8	+4.5%	9.9	NM	5.1x	EBL	24,199	1.8%	5.1x	0.8x	UNILEVERCL	2,773.6	+0.9%	96.0	60.2x	24.4x

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)
KBPPWBIL	141.2	-9.9%	53.8	NM	11.9x	BEXIMCO	104.9	104.1	25.0	176	18.35
NEWLINE	27.6	-9.2%	1.0	53.1x	1x	AL-HAJTEX	140.0	136.0	3.0	122	16.62
ORIONINFU	327.6	-8.3%	88.4	NM	22.0x	BEACHHATCH	88.0	87.0	8.0	137	11.98
APOLOISPAT	4.0	-7.0%	1.9	NM	0.2x	SPCERAMICS	17.4	17.4	5.0	595	10.34
GHCL	28.1	-6.3%	22.0	NM	0.6x	NBL	6.3	6.3	1.0	1,400	8.82
ICBSONALI1	6.1	-6.2%	17.6	NM	0.9x	ORIONINFU	379.0	369.1	5.0	22	8.21
KPPL	11.3	-5.8%	5.5	NM	NM	AUL	115.4	115.2	3.0	59	6.82
ICBIBANK	3.3	-5.7%	4.3	NM	NM	SUNLIFEINS	57.0	57.0	1.0	100	5.70
SPCERAMICS	15.1	-5.6%	25.6	68.6x	0.5x	MIDLANDBNK	27.6	25.1	3.0	205	5.59
FIRSTSBANK	7.0	-5.4%	36.9	2.9x	0.3x	GENEXIL	47.5	47.5	1.0	100	4.75

* 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
BEXIMCO	104.9	104.1	18.4	176	25
AL-HAJTEX	140.0	136.0	16.6	122	3
BEACHHATCH	88.0	87.0	12.0	137	8
SPCERAMICS	17.4	17.4	10.3	595	5
NBL	6.3	6.3	8.8	1,400	1
ORIONINFU	379.0	369.1	8.2	22	5
AIL	115.4	115.2	6.8	59	3
SUNLIFEINS	57.0	57.0	5.7	100	1
MIDLANDBNK	27.6	25.1	5.6	205	3
GENEXIL	47.5	47.5	4.8	100	1
PRAGATILIF	254.0	225.0	4.6	19	3
CONFIDCEM	72.7	72.7	4.1	57	2
AGNISYSL	35.0	33.6	3.0	88	3
BATBC	408.0	359.2	2.9	8	2
CENTRALINS	45.0	45.0	2.9	65	1
CRYSTALINS	68.5	68.5	2.7	40	1
NAVANAPHAR	62.2	61.0	1.8	30	2
NAVANAPHAR	62.2	61.0	1.8	30	2
FORTUNE	26.5	26.5	1.3	50	1
SIMTEX	21.8	21.0	1.3	61	2
IBNSINA	350.0	350.0	1.1	3	1
FEKDIL	19.0	19.0	1.0	50	1
Total			133.4		85

Important DSE News

ENVOYTEX

Cosmopolitan Industries (Pvt.) Limited (where Mr. Tanvir Ahmed and Mr. Sunil Daulatram Daryanani are common directors of both Envoy Textiles Ltd. and Cosmopolitan Industries (Pvt.) Limited) has expressed its intention to buy 3,600,000 shares of Envoy Textiles Limited at prevailing market price (in the Block Market).

SEAPEARL

The Company has informed that the Corporate Office address of the company has been shifted to Advance Noorani Tower (9th Floor), 01 Mohakhali C/A, Dhaka-1212 with effect from September 15, 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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