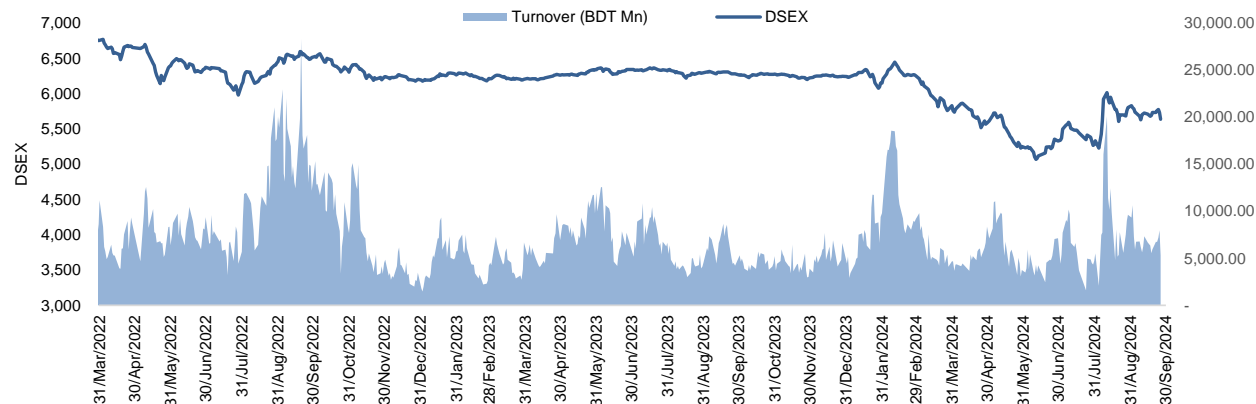


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.70%) lost 97.37 points and closed at 5,639.13. The blue-chip index DS30 (-1.44%), the Shariah-based index DSES (-2.42%), and the large-cap index CDSET (-1.75%) closed at 2,064.93, 1,261.94, and 1,151.33 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.91% followed by Engineering (-2.73%), Fuel & Power (-1.24%), Food & Allied (-1.14%), Telecommunication (-0.98%), Pharmaceutical (-0.74%), and Bank (-0.43%), respectively. Block trades contributed 2.9% of the overall market turnover. Social Islami Bank Limited (+5.7%) was the most traded share with a turnover of BDT 404 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,639.13	5,736.51	-97.37	-1.70%	-9.7%
DS30	2,064.93	2,095.05	-30.11	-1.44%	-1.4%
DSES	1,261.94	1,293.20	-31.26	-2.42%	-7.5%
CDSET	1,151.33	1,171.81	-20.48	-1.75%	-4.3%

	Advanced	Declined	Unchanged	Total
All Category	72	299	25	396
A Category (Equity)	47	165	19	231
B Category (Equity)	17	62	0	79
N Category (Equity)	1	4	0	5
Z Category (Equity)	7	68	6	81
Mutual Funds	2	28	7	37
Corporate Bonds	0	2	1	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,856,212	6,892,727	-0.5%
	Mn USD	57,135	57,439	
Turnover	Mn BDT	5,309	7,969	-33.4%
	Mn USD	44	66	
Volume	Mn Shares	230	258	-10.6%
No. of Trade		157,719	201,247	-21.6%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 26, 2024

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Figure: Sectorial Turnover (BDT Mn)

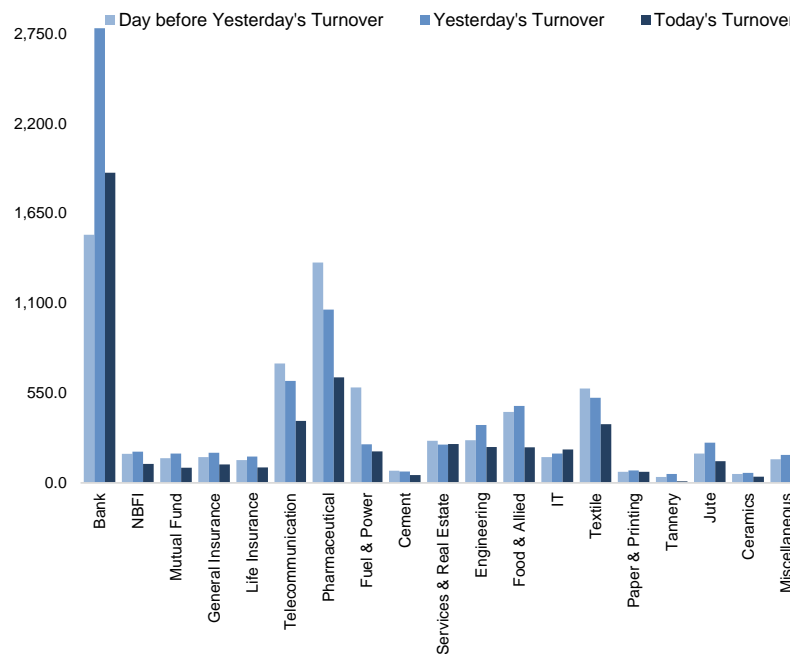
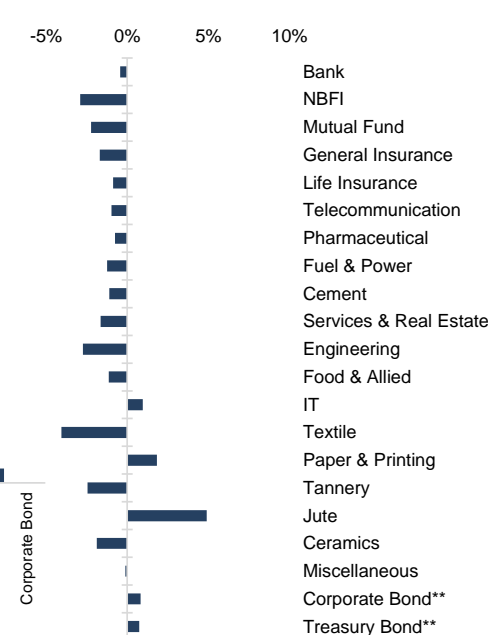


Figure: Sectorial Mcap Change



Market PE 15.3x
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	1,607	-6.89	-0.43%	36	766,493	11.1%	1,896.8	36.8%	8.3x	0.8x	GP	471,795	12.1%	312.0	13.4x	6.6x
NBFI	1,255	1,293	-37.59	-2.91%	23	121,513	1.8%	115.7	2.2%	NM	NM	BATBC	214,380	5.5%	50.1	12.2x	3.7x
Mutual Fund	616	630	-14.01	-2.22%	37	28,778	0.4%	93.6	1.8%	NM	0.6x	SQRPHARMA	203,529	5.2%	64.9	10.1x	1.7x
General Insurance	2,780	2,828	-47.84	-1.69%	43	80,534	1.2%	112.3	2.2%	14.6x	1.2x	WALTONHIL	181,060	4.6%	28.4	13.3x	1.6x
Life Insurance	2,137	2,156	-18.55	-0.86%	15	56,820	0.8%	94.1	1.8%	NM	NM	ROBI	145,091	3.7%	49.4	31.1x	2.3x
Telecommunication	5,536	5,591	-54.63	-0.98%	3	641,011	9.3%	379.6	7.4%	15.3x	4.3x	BEXIMCO	103,842	2.7%	0.0	NM	1.2x
Pharmaceutical	3,094	3,117	-23.15	-0.74%	34	587,075	8.5%	645.5	12.5%	15.7x	1.7x	ISLAMIBANK	103,683	2.7%	352.2	15.9x	1.4x
Fuel & Power	1,202	1,217	-15.10	-1.24%	23	316,328	4.6%	192.6	3.7%	20.8x	0.7x	BRACBANK	97,511	2.5%	243.7	10.0x	1.4x
Cement	2,315	2,341	-25.65	-1.10%	7	110,568	1.6%	47.3	0.9%	17.9x	2.4x	RENATA	84,910	2.2%	13.9	37.0x	2.6x
Services & Real Estate	1,188	1,208	-19.91	-1.65%	9	65,682	1.0%	238.4	4.6%	20.7x	0.5x	BERGERPBL	82,242	2.1%	0.5	25.4x	5.4x
Engineering	2,832	2,912	-79.44	-2.73%	42	327,213	4.8%	220.0	4.3%	13.5x	1.0x	MARICO	72,302	1.8%	7.6	14.5x	7.3x
Food & Allied	18,497	18,710	-212.80	-1.14%	21	339,596	4.9%	218.1	4.2%	17.9x	5.3x	LHBL	71,541	1.8%	16.0	15.0x	3.7x
IT	2,318	2,296	+21.90	+0.95%	11	30,491	0.4%	203.7	4.0%	25.2x	2.0x	ICB	55,158	1.4%	6.3	NM	1.3x
Textile	1,163	1,212	-49.26	-4.06%	58	120,638	1.8%	359.2	7.0%	NM	0.8x	UNILEVERCL	52,823	1.4%	0.3	59.5x	24.1x
Paper & Printing	5,020	4,929	+90.74	+1.84%	6	23,032	0.3%	67.6	1.3%	35.9x	1.0x	DUTCHBANGL	47,456	1.2%	6.3	6.2x	1.0x
Tannery	2,147	2,201	-53.97	-2.45%	6	23,513	0.3%	10.0	0.2%	40.7x	2.2x	OLYMPIC	36,729	0.9%	23.4	21.9x	3.5x
Jute	17,684	16,856	+827.80	+4.91%	3	4,144	0.1%	132.6	2.6%	NM	NM	EBL	35,176	0.9%	14.0	5.1x	0.8x
Ceramics	403	411	-7.69	-1.87%	5	17,901	0.3%	37.4	0.7%	47.7x	1.1x	POWERGRID	34,542	0.9%	2.9	NM	0.2x
Miscellaneous	4,171	4,176	-4.69	-0.11%	15	227,294	3.3%	87.1	1.7%	38.4x	1.7x	BXPHARMA	31,808	0.8%	25.1	6.0x	0.7x
Corporate Bond**	8,432	8,363	+68.94	+0.82%	16	35,643	0.5%	1.1	0.0%	NM	NM	MJLBD	31,390	0.8%	87.5	10.1x	2.2x
Treasury Bond**	383	381	+2.80	+0.74%	237	2,958,118	43.0%	0.0	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	
FIRSTSBANK	7.7	+10.0%	117.8	3.2x	0.3x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	SIBL	13.0	+5.7%	403.5	6.8x	0.6x	
UNIONBANK	7.0	+9.4%	50.4	4.2x	0.4x	BEXIMCO	69,460	5.1%	NM	1.2x	ISLAMIBANK	64.4	-8.5%	352.2	15.9x	1.4x	
GIB	7.2	+9.1%	151.2	4.8x	0.5x	BATBC	45,948	3.4%	12.2x	3.7x	GP	349.4	-0.6%	312.0	13.4x	6.6x	
ADNTEL	91.4	+9.1%	53.6	NM	3.0x	RENATA	35,002	2.6%	37.0x	2.6x	BRACBANK	55.1	-2.8%	243.7	10.0x	1.4x	
ICBIBANK	3.7	+8.8%	7.0	NM	NM	ISLAMIBANK	33,649	2.5%	15.9x	1.4x	GIB	7.2	+9.1%	151.2	4.8x	0.5x	
AMANFEED	24.7	+8.8%	3.8	60.2x	0.9x	BXPHARMA	32,479	2.4%	6.0x	0.7x	IBNSINA	362.9	-1.0%	147.3	16.4x	3.4x	
ORIONINFU	327.4	+8.7%	42.2	NM	22x	BRACBANK	32,157	2.4%	10.0x	1.4x	SONALIANS	323.6	+7.1%	132.1	37.7x	4.8x	
ABBANK	9.9	+7.6%	77.0	13.6x	0.3x	GP	30,004	2.2%	13.4x	6.6x	FIRSTSBANK	7.7	+10.0%	117.8	3.2x	0.3x	
STANDBANKL	7.3	+7.4%	9.4	5.1x	0.4x	LHBL	24,690	1.8%	15.0x	3.7x	UNIQUEHRL	53.8	+0.6%	109.0	10.5x	0.6x	
SONALIANS	323.6	+7.1%	132.1	37.7x	4.8x	EBL	24,199	1.8%	5.1x	0.8x	MJLBD	99.1	+0.6%	87.5	10.1x	2.2x	
						PUBALIBANK	20,448	1.5%	3.5x	0.6x							
						NBL	16,930	1.2%	NM	1.6x							
						CITYBANK	16,830	1.2%	4.7x	0.8x							
						BSRMLTD	14,210	1.0%	4.0x	0.5x							
						ALARABANK	13,534	1.0%	10.1x	1.1x							
						PRIMEBANK	12,985	1.0%	4.6x	0.7x							
						OLYMPIC	12,616	0.9%	21.9x	3.5x							
						UTTARABANK	11,350	0.8%	12.0x	0.8x							
						ORIONPHARM	11,317	0.8%	8.9x	0.4x							
						ROBI	10,738	0.8%	31.1x	2.3x							
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)	
LRBDL	15.3	-10.0%	2.2	35.6x	0.4x	ISLAMIINS	46.0	46.0	1.0	800	36.80						
DSHGARME	78.4	-10.0%	0.7	NM	4x	DAFODILCOM	78.0	76.0	7.0	331	25.38						
ADVENT	19.9	-10.0%	1.2	20.1x	1.3x	BEXIMCO	106.1	104.1	25.0	160	16.75						
BEACHHATCH	80.6	-9.9%	6.9	41.8x	6.4x	RELIANCE1	19.5	18.4	7.0	708	13.41						
FARCHEM	16.5	-9.8%	2.9	NM	0.5x	PRAGATILIF	238.0	205.0	6.0	46	9.92						
GSPFINANCE	9.2	-9.8%	0.5	NM	0.4x	NBL	6.0	6.0	1.0	1,400	8.40						
BAYLEASING	9.2	-9.8%	2.7	NM	1.8x	ADNTEL	88.1	88.0	5.0	95	8.36						
PDL	9.2	-9.8%	2.4	NM	0.7x	MIDLANDBNK	27.0	27.0	2.0	200	5.40						
MIRACLEIND	25.8	-9.8%	3.1	NM	1.6x	NEWLINE	27.3	27.3	1.0	132	3.60						
BDTHAI	12.0	-9.8%	2.0	NM	0.4x	DOMINAGE	12.0	12.0	3.0	297	3.56						

* 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
ISLAMIINS	46.0	46.0	36.8	800	1
DAFODILCOM	78.0	76.0	25.4	331	7
BEXIMCO	106.1	104.1	16.7	160	25
RELIANCE1	19.5	18.4	13.4	708	7
PRAGATILIF	238.0	205.0	9.9	46	6
NBL	6.0	6.0	8.4	1,400	1
ADNTEL	88.1	88.0	8.4	95	5
MIDLANDBNK	27.0	27.0	5.4	200	2
NEWLINE	27.3	27.3	3.6	132	1
DOMINAGE	12.0	12.0	3.6	297	3
PRIMEBANK	24.5	24.5	2.6	106	1
ADVENT	23.6	23.6	2.5	105	1
EIL	50.0	50.0	2.3	46	2
TOSRIFA	26.5	24.3	2.0	81	3
EPGL	20.4	20.4	2.0	100	1
TECHNODRUG	45.0	45.0	1.4	30	1
IBNSINA	370.0	370.0	1.1	3	1
IBNSINA	370.0	370.0	1.1	3	1
AIL	98.0	98.0	1.0	10	1
LINDEBD	1,333.3	1,333.3	1.0	1	1
SEAPEARL	50.5	50.5	0.9	19	1
AFTABAUTO	30.8	30.8	0.9	30	1
Total			155.7		81

Important DSE News

UNIONINS

The Company will be placed in 'Z' category from existing 'B' category with effect from today i.e., September 26, 2024 as per provision 1(e) of BSEC Directive No. BSEC/CMRRCD/2009-193/77 dated May 20, 2024.

UNIQUEHRL

The Board of Directors has recommended 16% Cash Dividend for the year ended June 30, 2024. Date of AGM: 19.12.2024, Time: 10:30 AM, Venue: Digital Platform. Record Date: 20.10.2024. The Company has reported EPS of Tk. 5.14, NAV per share of Tk. 88.75 and NOCFPS of Tk. 6.47 for the year ended June 30, 2024 as against Tk. 6.42, Tk. 88.51 and Tk. 5.13 respectively for the year ended June 30, 2023.

ISLAMIINS

Ms. Fatima Noshin Maysya Sayeed Aurora, a Director of the Company, has expressed her intention to buy 8,23,000 shares of the Company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within October 31, 2024.

WALTONHIL

Mr. S. M. Monjurul Alam Ovee, a Director of the company, has expressed his intention to transfer a total of 12,000,000 shares of the company comprising 6,857,142 shares to his father Mr. S.M. Nurul Alam Rezvi (a sponsor director of the company) and 5,142,858 shares to his mother Ms. Sultana Parven Lucky (general shareholder of the company) by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 24, 2024.

Mr. S. M. Mahbulul Alam, a Sponsor Director of the company, has expressed his intention to transfer 6,000,000 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 24, 2024.

PRIMEBANK

Mrs. Salma Huq, a Sponsor Director of the company, has expressed her intention to transfer 7,500,000 shares to her daughter Ms. Sara Huq by way of gift outside the trading system of the Exchange within October 31, 2024 with effect from September 24, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
UNIQUEHRL		0.0%	16%	Record Date	20-Oct-24
CVOPRL		0.0%	10%	Record Date	31-Oct-24

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