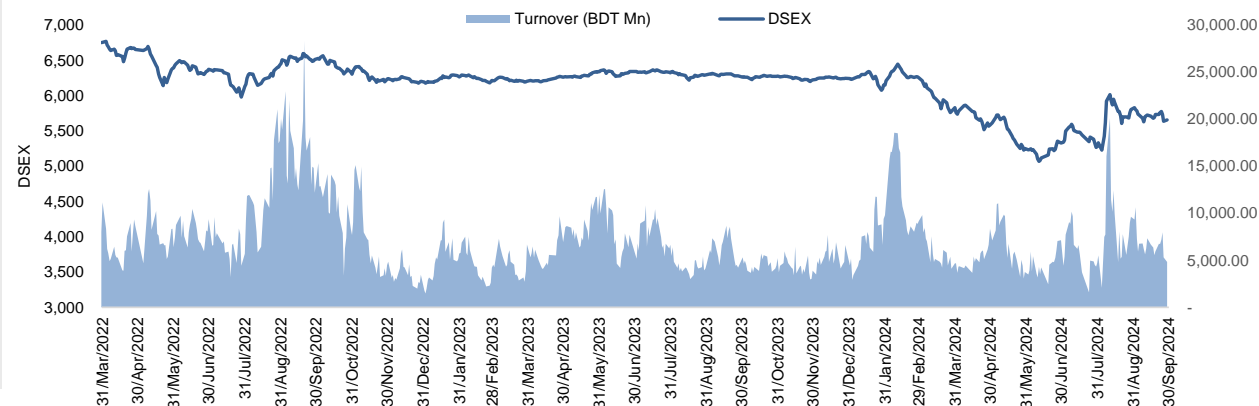


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.34%) gained 18.98 points and closed at 5,658.12. The blue-chip index DS30 (-0.10%), the Shariah-based index DSES (+0.73%), and the large-cap index CDSET (+0.54%) closed at 2,062.93, 1,271.09, and 1,157.59 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.13% followed by Engineering (-0.55%), Pharmaceutical (-0.52%), Telecommunication (-0.36%), Fuel & Power (-0.25%), Food & Allied (+0.13%), and Bank (+0.63%), respectively. Block trades contributed 1.8% of the overall market turnover. Grameenphone Ltd. (0.0%) was the most traded share with a turnover of BDT 328 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,658.12	5,639.13	+18.98	+0.34%	-9.4%
DS30	2,062.93	2,064.93	-2.00	-0.10%	-1.5%
DSES	1,271.09	1,261.94	+9.15	+0.73%	-6.8%
CDSET	1,157.59	1,151.33	+6.26	+0.54%	-3.8%

	Advanced	Declined	Unchanged	Total
All Category	153	205	39	397
A Category (Equity)	99	107	26	232
B Category (Equity)	38	38	4	80
N Category (Equity)	1	3	0	4
Z Category (Equity)	15	57	9	81
Mutual Funds	9	13	15	37
Corporate Bonds	2	0	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,856,000	6,856,212	-0.0%
	Mn USD	57,133	57,135	-0.0%
Turnover	Mn BDT	4,813	5,309	-9.3%
	Mn USD	40	44	-9.3%
Volume	Mn Shares	200	230	-13.2%
No. of Trade		138,303	157,719	-12.3%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 29, 2024

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Figure: Sectorial Turnover (BDT Mn)

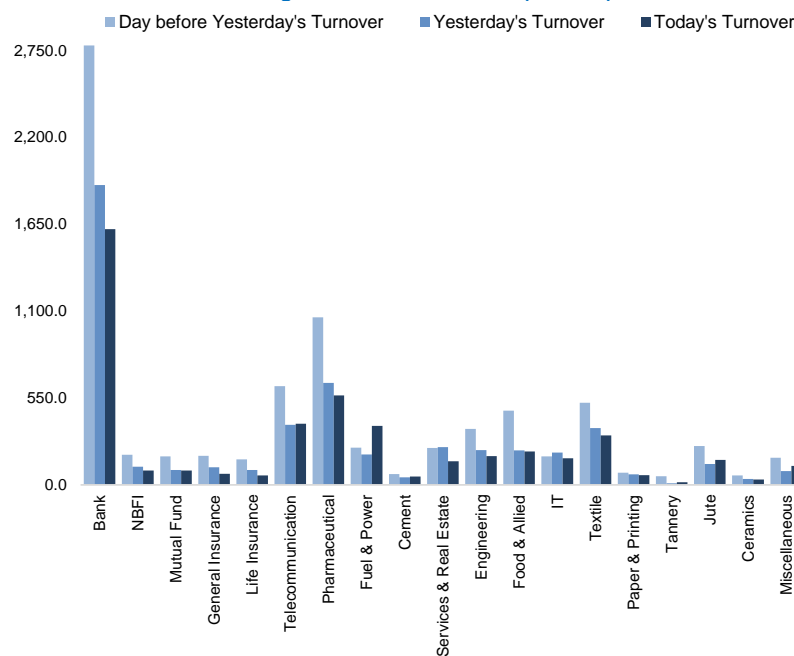
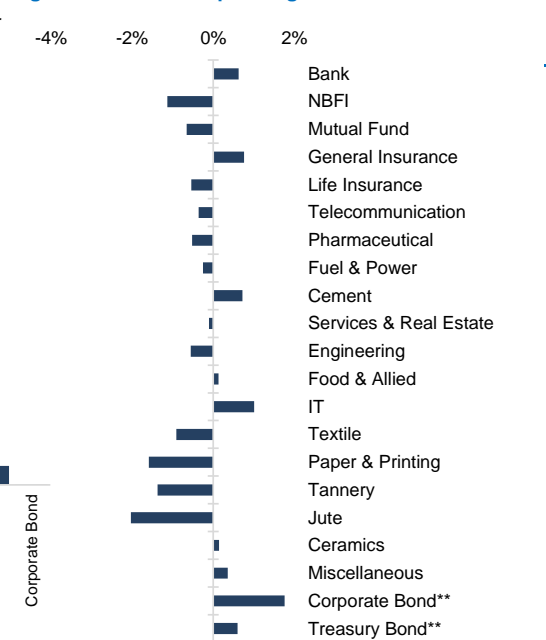


Figure: Sectorial Mcap Change



Market PE 15.2x

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	1,610	1,600	+10.03	+0.63%	36	771,298	11.2%	1,619.2	34.3%	8.4x	0.8x	GP	471,660	12.1%	328.0	13.3x	6.6x
NBFI	1,241	1,255	-14.19	-1.13%	23	120,139	1.7%	90.3	1.9%	NM	NM	BATBC	214,380	5.5%	44.3	12.2x	3.7x
Mutual Fund	612	616	-4.03	-0.65%	37	28,590	0.4%	91.6	1.9%	NM	0.6x	SQRPHARMA	202,820	5.2%	25.3	10.0x	1.7x
General Insurance	2,801	2,780	+21.10	+0.76%	43	81,145	1.2%	69.8	1.5%	14.7x	1.2x	WALTONHIL	180,394	4.6%	33.2	13.3x	1.6x
Life Insurance	2,126	2,137	-11.54	-0.54%	15	56,513	0.8%	60.4	1.3%	NM	NM	ROBI	144,043	3.7%	43.6	30.9x	2.3x
Telecommunication	5,516	5,536	-19.90	-0.36%	3	638,707	9.3%	386.7	8.2%	15.2x	4.2x	ISLAMIBANK	109,157	2.8%	288.8	16.8x	1.5x
Pharmaceutical	3,078	3,094	-16.12	-0.52%	34	584,017	8.5%	566.6	12.0%	15.1x	1.7x	BEXIMCO	103,842	2.7%	0.0	NM	1.2x
Fuel & Power	1,198	1,202	-3.01	-0.25%	23	315,535	4.6%	373.0	7.9%	20.7x	0.7x	BRACBANK	96,095	2.5%	264.8	9.9x	1.4x
Cement	2,332	2,315	+16.65	+0.72%	7	111,363	1.6%	52.7	1.1%	18.0x	2.5x	RENATA	82,949	2.1%	28.8	22.9x	2.4x
Services & Real Estate	1,187	1,188	-1.25	-0.11%	9	65,613	1.0%	150.0	3.2%	20.7x	0.5x	BERGERPBL	82,196	2.1%	0.4	25.4x	5.4x
Engineering	2,816	2,832	-15.72	-0.55%	42	325,398	4.7%	181.8	3.8%	13.4x	1.0x	LHBL	72,121	1.8%	17.0	15.1x	3.7x
Food & Allied	18,521	18,497	+23.89	+0.13%	21	340,034	4.9%	211.8	4.5%	17.9x	5.3x	MARICO	71,990	1.8%	0.8	14.4x	7.2x
IT	2,341	2,318	+23.44	+1.01%	11	30,800	0.4%	167.7	3.5%	25.4x	2.0x	ICB	53,944	1.4%	1.1	NM	1.3x
Textile	1,152	1,163	-10.61	-0.91%	58	119,537	1.7%	312.8	6.6%	NM	0.8x	UNILEVERCL	52,968	1.4%	1.7	59.7x	24.2x
Paper & Printing	4,940	5,020	-79.74	-1.59%	6	22,666	0.3%	61.0	1.3%	35.4x	1.0x	DUTCHBANGL	47,193	1.2%	8.1	6.2x	1.0x
Tannery	2,117	2,147	-29.45	-1.37%	6	23,190	0.3%	17.2	0.4%	40.1x	2.2x	OLYMPIC	36,669	0.9%	16.2	21.9x	3.5x
Jute	17,324	17,684	-359.50	-2.03%	3	4,060	0.1%	158.4	3.4%	NM	NM	POWERGRID	35,730	0.9%	2.7	NM	0.2x
Ceramics	404	403	+0.58	+0.14%	5	17,927	0.3%	34.0	0.7%	47.8x	1.1x	EBL	35,040	0.9%	23.3	5.0x	0.8x
Miscellaneous	4,186	4,171	+14.89	+0.36%	15	228,105	3.3%	119.9	2.5%	38.6x	1.7x	BXPHARMA	32,566	0.8%	23.2	6.1x	0.7x
Corporate Bond**	8,581	8,432	+148.62	+1.76%	16	35,949	0.5%	1.2	0.0%	NM	NM	MJLBD	32,562	0.8%	250.3	10.5x	2.2x
Treasury Bond**	386	383	+2.30	+0.60%	237	2,961,725	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
KBPPWBIL	146.9	+9.6%	54.3	NM	12.4x	SQRPHARMA	117,112	8.6%	10.0x	1.7x	GP	349.3	-0.0%	328.0	13.3x	6.6x
FIRSTSBANK	8.4	+9.1%	227.2	3.5x	0.4x	BEXIMCO	69,460	5.1%	NM	1.2x	ISLAMIBANK	67.8	+5.3%	288.8	16.8x	1.5x
PDL	49.7	+8.5%	9.8	7.4x	1.2x	BATBC	45,948	3.4%	12.2x	3.7x	BRACBANK	54.3	-1.5%	264.8	9.9x	1.4x
DESHBANDHU	21.9	+8.4%	10.0	37.1x	1.1x	RENATA	35,002	2.6%	22.9x	2.4x	MJLBD	102.8	+3.7%	250.3	10.5x	2.2x
SPCERAMICS	14.4	+8.3%	20.5	65.5x	0.5x	ISLAMIBANK	33,649	2.5%	16.8x	1.5x	SIBL	13.2	+1.5%	239.4	6.9x	0.6x
ADNTEL	98.7	+8.0%	81.8	NM	3.2x	BXPHARMA	32,479	2.4%	6.1x	0.7x	FIRSTSBANK	8.4	+9.1%	227.2	3.5x	0.4x
ICBAGRANI1	7.6	+7.0%	0.0	NM	1x	BRACBANK	32,157	2.4%	9.9x	1.4x	GIB	7.7	+6.9%	180.6	5.2x	0.5x
GIB	7.7	+6.9%	180.6	5.2x	0.5x	GP	30,004	2.2%	13.3x	6.6x	IBNSINA	365.4	+0.7%	168.3	16.5x	3.4x
ISLAMIINS	45.2	+6.1%	6.0	14.8x	2.0x	LHBL	24,690	1.8%	15.1x	3.7x	SONALIANS	316.4	-2.2%	157.8	36.9x	4.7x
NCCBLMF1	5.7	+5.6%	0.0	NM	0.6x	EBL	24,199	1.8%	5.0x	0.8x	ADNTEL	98.7	+8.0%	81.8	NM	3.2x
						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%	10.2x	1.1x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	21.9x	3.5x						
						UTTARABANK	11,350	0.8%	11.9x	0.8x						
						ORIONPHARM	11,317	0.8%	8.8x	0.4x						
						ROBI	10,738	0.8%	30.9x	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)
KTL	11.6	-16.5%	48.2	NM	0.8x						ADNTEL	95.0	91.4	13.0	226	20.83
BDTHAI	10.8	-10.0%	18.6	NM	0x						AL-HAJTEX	135.6	134.0	5.0	69	9.39
CENTRALPHL	11.0	-9.8%	12.1	NM	1.5x						NBL	5.6	5.6	2.0	1,600	8.96
VFSTD	10.1	-9.8%	7.1	21.4x	0.5x						BEXIMCO	114.9	104.1	7.0	76	7.96
GSPFINANCE	8.3	-9.8%	14.8	NM	0.3x						AIL	106.9	91.0	4.0	51	5.09
PDL	8.3	-9.8%	11.2	NM	0.6x						NLTUBES	71.0	71.0	2.0	70	4.95
FORTUNE	19.5	-9.7%	7.9	19.2x	1.3x						ISLAMIBANK	65.0	64.4	3.0	62	4.04
MIRACLEIND	23.3	-9.7%	13.6	NM	1.5x						BRACBANK	56.2	53.3	2.0	49	2.64
ADVNT	18.0	-9.5%	4.5	18.2x	1.1x						PRAGATILIF	215.0	215.0	2.0	11	2.39
OAL	8.6	-9.5%	5.7	NM	0.8x						UNIQUEHRL	51.5	51.5	1.0	45	2.32

* 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
ADNTEL	95.0	91.4	20.8	226	13
AL-HAJTEX	135.6	134.0	9.4	69	5
NBL	5.6	5.6	9.0	1,600	2
BEXIMCO	114.9	104.1	8.0	76	7
AIL	106.9	91.0	5.1	51	4
NLTUBES	71.0	71.0	5.0	70	2
ISLAMIBANK	65.0	64.4	4.0	62	3
BRACBANK	56.2	53.3	2.6	49	2
PRAGATILIF	215.0	215.0	2.4	11	2
UNIQUEHRL	51.5	51.5	2.3	45	1
BEACONPHAR	148.0	148.0	2.2	15	1
IBNSINA	370.0	370.0	2.2	6	1
FINEFOODS	171.0	171.0	2.2	13	1
MJLBD	102.0	102.0	1.5	15	1
RELIANCE1	18.6	18.6	1.5	80	1
PREMIERCEM	65.7	65.7	1.0	15	1
DAFODILCOM	81.5	81.5	1.0	12	1
DAFODILCOM	81.5	81.5	1.0	12	1
ENVOYTEX	47.5	47.5	1.0	20	1
BESTHLDNG	23.0	23.0	0.9	40	1
SONALIPAPR	180.0	180.0	0.8	4	1
LOVELLO	84.8	84.8	0.8	9	1
Total			87.2		58

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
RENATA		0.0%	92%	Record Date	21-Oct-24
KTL		0.0%	0%	Record Date	22-Oct-24
CVOPRL		0.0%	10%	Record Date	31-Oct-24

Important DSE News

EPGL

The Company will be placed in 'B' category from existing 'Z' category with effect from today i.e., September 29, 2024 as the Company has reported disbursement of 5% Cash Dividend for the year ended June 30, 2023.

The Stock Brokers and Merchant Bankers are requested to abstain from providing loan facilities to purchase the securities of Energypac Power Generation PLC. in between 1st to 7th trading days following the change of categorization, with effect from today i.e., September 29, 2024 as per BSEC Directive No. BSEC/CMRRCD/2009-193/32 dated December 26, 2021.

RENATA

The Board of Directors has recommended 92% Cash Dividend for the year ended June 30, 2024. Date of AGM: 05.12.2024, Time: 11:30 AM, Venue: Digital Platform. Record Date: 21.10.2024. The Company has also reported Consolidated EPS of Tk. 31.53, Consolidated NAV per share of Tk. 295.56 and Consolidated NOCFPS of Tk. 18.16 for the year ended June 30, 2024 as against Tk. 20.40, Tk. 266.87 and Tk. 18.18 respectively for the year ended June 30, 2023.

KTL

The Board of Directors has recommended No Dividend for the year ended June 30, 2022. Date of AGM: 21.11.2024, Time: 11:00 AM, Venue: Hybrid System (The AGM venue details will be conveyed through the AGM notice). Record Date: 22.10.2024. The Company has reported EPS of Tk. 0.17, NAV per share of Tk. 16.18 and NOCFPS of Tk. 0.14 for the year ended June 30, 2022 as against Tk. 0.52, Tk. 16.71 and Tk. 0.19 respectively for the year ended June 30, 2021.

The Board of Directors has recommended No Dividend for the year ended June 30, 2023. Date of AGM: 21.11.2024, Time: 12:01 PM, Venue: Hybrid System (The AGM venue details will be conveyed through the AGM notice). Record Date: 22.10.2024. The Company has reported EPS of Tk. (0.32), NAV per share of Tk. 15.86 and NOCFPS of Tk. (1.02) for the year ended June 30, 2023 as against Tk. 0.17, Tk. 16.18 and Tk. 0.14 respectively for the year ended June 30, 2022.

The Board of Directors has recommended 0.25% Cash Dividend excluding sponsors/directors of the company for the year ended June 30, 2024. The Sponsors and Directors are holding 3,52,60,499 shares out of total 11,63,05,200 shares of the company and that total cash dividend amount payable to the general shareholders only is Tk. 20,26,117.53 for 8,10,44,701 shares, subject to approval by the shareholders. Date of AGM: 21.11.2024, Time: 1:00 PM, Venue: Hybrid System (The AGM venue details will be conveyed through the AGM notice). Record Date: 22.10.2024. The Company has reported EPS of Tk. (0.84), NAV per share of Tk. 15.02 and NOCFPS of Tk. (1.22) for the year ended June 30, 2024 as against Tk. (0.32), Tk. 15.86 and Tk. (1.02) respectively for the year ended June 30, 2023.

MERCANBANK

Dr. A.K.M. Shaheed Reza, a Sponsor of the company, has expressed his intention to sell 58,00,000 shares out of his total holding of 4,72,75,087 shares of the Company at prevailing market price (In the Public and/or Block Market) through Dhaka Stock Exchange PLC. within October 31, 2024.

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