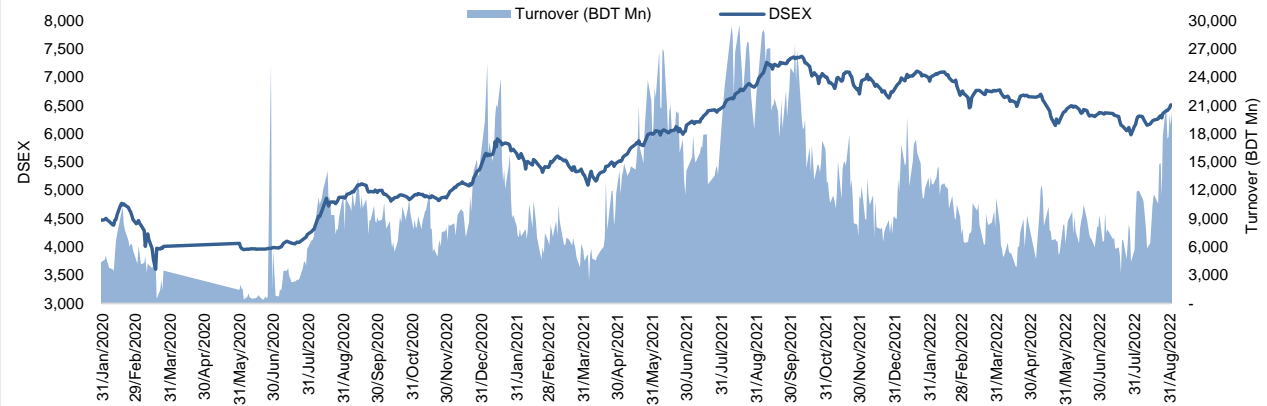


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.43%) gained 27.83 points and closed at 6,515.01. The blue-chip index DS30 (+0.56%), the Shariah-based index DSES (+0.85%), and the large-cap index CDSET (+0.42%) closed at 2,346.35, 1,429.56, and 1,284.32 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 1.03% followed by Food & Allied (+0.08%), Fuel & Power (+0.08%). NBF1 experienced the highest loss of 0.94% followed by Bank (-0.16%), Telecommunication (-0.08%), Engineering (-0.06%). Block trades contributed 0.8% of the overall market turnover. Bangladesh Export Import Company Ltd. (+0.7%) was the most traded share with a turnover of BDT 1,808 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 6,515.01 | 6,487.18 | +27.83 | +0.43% | -3.6% |
| DS30 | 2,346.35 | 2,333.24 | +13.12 | +0.56% | -7.4% |
| DSES | 1,429.56 | 1,417.53 | +12.03 | +0.85% | -0.1% |
| CDSET | 1,284.32 | 1,278.89 | +5.43 | +0.42% | -5.5% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 123 | 107 | 141 | 371 |
| A Category (Equity) | 90 | 75 | 88 | 253 |
| B Category (Equity) | 28 | 28 | 36 | 92 |
| N Category (Equity) | 2 | 2 | 2 | 6 |
| Z Category (Equity) | 3 | 2 | 15 | 20 |
| Mutual Funds | 1 | 0 | 27 | 28 |
| Corporate Bonds | 0 | 2 | 1 | 3 |

| | | Today | Last Day | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap | Mn BDT | 5,201,266 | 5,189,005 | +0.2% |
| | Mn USD | 48,724 | 48,609 | |
| Turnover | Mn BDT | 12,428 | 13,078 | -5.0% |
| | Mn USD | 116 | 123 | |
| Volume | Mn Shares | 204 | 217 | -5.9% |
| No. of Trade | | 200,356 | 219,677 | -8.8% |

* Average Exchange Rate is BDT 106.75 as of Sep 15, 2022

| | |
|---|--|
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|---|--|

Figure: Sectorial Turnover (BDT Mn)

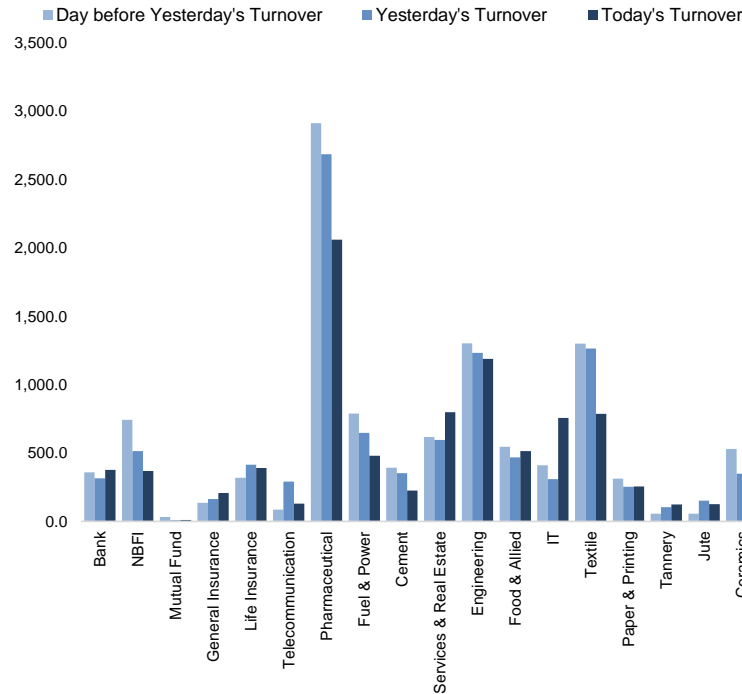
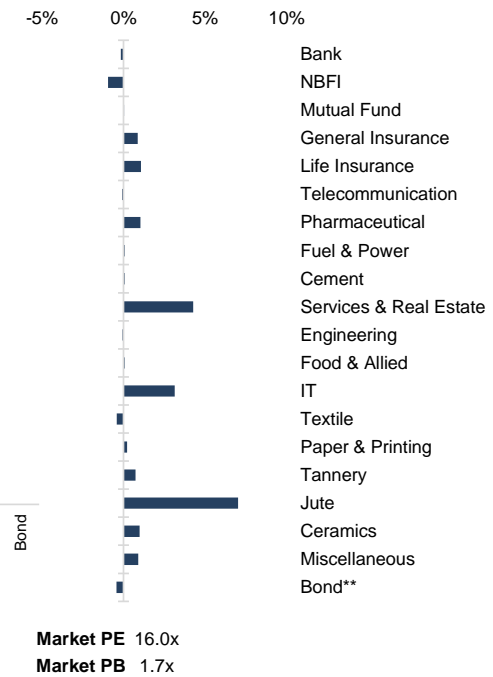


Figure: Sectorial Mcap Change



| 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 | 1,458 | 1,460 | -2.39 | -0.16% | 33 | 667,765 | 14.5% | 377.7 | 3.2% | 7.8x | 0.8x | GP | 386,996 | 8.4% | 12.6 | 11.4x | 7.7x |
| NBFI | 2,045 | 2,064 | -19.42 | -0.94% | 23 | 199,479 | 4.3% | 369.7 | 3.1% | NM | 3.9x | WALTONHIL | 317,378 | 6.9% | 1.3 | 26.1x | 3.1x |
| Mutual Fund | 855 | 854 | +0.36 | +0.04% | 36 | 37,638 | 0.8% | 10.6 | 0.1% | NM | 0.8x | BATBC | 280,098 | 6.1% | 27.2 | 18.1x | 7.4x |
| General Insurance | 3,234 | 3,206 | +27.99 | +0.87% | 41 | 93,720 | 2.0% | 208.2 | 1.8% | 15.1x | 1.5x | SQURPHARMA | 186,155 | 4.1% | 64.9 | 10.1x | 1.9x |
| Life Insurance | 2,496 | 2,470 | +26.32 | +1.07% | 13 | 69,325 | 1.5% | 391.4 | 3.3% | NM | NM | ROBI | 157,138 | 3.4% | 2.4 | NM | 2.4x |
| Telecommunication | 4,961 | 4,965 | -4.08 | -0.08% | 3 | 581,996 | 12.7% | 130.9 | 1.1% | 15.5x | 4.6x | RENATA | 139,876 | 3.0% | 9.0 | 25.3x | 4.9x |
| Pharmaceutical | 3,959 | 3,919 | +40.54 | +1.03% | 32 | 755,755 | 16.4% | 2,061.4 | 17.4% | 18.6x | 2.7x | UPGDCL | 136,634 | 3.0% | 12.9 | 11.1x | 4.2x |
| Fuel & Power | 1,736 | 1,735 | +1.31 | +0.08% | 23 | 457,789 | 10.0% | 479.4 | 4.0% | 11.5x | 1.2x | BEXIMCO | 119,092 | 2.6% | 1,808.3 | 8.3x | 1.5x |
| Cement | 2,663 | 2,661 | +2.01 | +0.08% | 7 | 127,890 | 2.8% | 226.3 | 1.9% | 27.8x | 2.8x | LHBL | 90,355 | 2.0% | 195.9 | 23.2x | 5.1x |
| Services & Real Estate | 1,640 | 1,573 | +67.29 | +4.28% | 8 | 64,791 | 1.4% | 798.4 | 6.7% | 90.2x | 1.2x | BERGERPBL | 82,089 | 1.8% | 1.1 | 26.6x | 7.2x |
| Engineering | 4,591 | 4,594 | -2.74 | -0.06% | 42 | 538,923 | 11.7% | 1,187.9 | 10.0% | 20.3x | 1.9x | BXPBARMA | 79,809 | 1.7% | 96.3 | 13.9x | 2.0x |
| Food & Allied | 21,497 | 21,481 | +16.38 | +0.08% | 21 | 383,051 | 8.3% | 513.7 | 4.3% | 23.0x | 8.1x | ICB | 77,842 | 1.7% | 3.1 | 44.1x | 1.7x |
| IT | 2,640 | 2,560 | +80.58 | +3.15% | 11 | 34,424 | 0.7% | 756.0 | 6.4% | 28.0x | 2.4x | MARICO | 77,814 | 1.7% | 3.8 | 22.2x | 33.8x |
| Textile | 1,707 | 1,715 | -7.08 | -0.41% | 58 | 179,606 | 3.9% | 787.4 | 6.6% | 27.0x | 1.1x | BEACONPHAR | 74,290 | 1.6% | 98.5 | 79.4x | 12.7x |
| Paper & Printing | 10,353 | 10,330 | +23.29 | +0.23% | 6 | 39,889 | 0.9% | 254.9 | 2.1% | NM | 2.7x | BRACBANK | 57,619 | 1.3% | 1.8 | 11.3x | 1.0x |
| Tannery | 3,167 | 3,143 | +23.42 | +0.75% | 6 | 34,097 | 0.7% | 124.9 | 1.1% | 36.1x | 3.3x | ISLAMIBANK | 52,808 | 1.1% | 2.6 | 10.8x | 0.8x |
| Jute | 12,102 | 11,308 | +793.85 | +7.02% | 3 | 2,961 | 0.1% | 126.3 | 1.1% | NM | 41.8x | DUTCHBANGL | 45,780 | 1.0% | 69.6 | 7.9x | 1.2x |
| Ceramics | 740 | 732 | +7.20 | +0.98% | 5 | 34,211 | 0.7% | 285.1 | 2.4% | 32.1x | 2.1x | TITASGAS | 40,954 | 0.9% | 21.0 | 12.2x | 0.6x |
| Miscellaneous | 4,614 | 4,572 | +41.61 | +0.91% | 15 | 258,827 | 5.6% | 2,769.0 | 23.3% | 12.6x | 2.2x | POWERGRID | 39,057 | 0.9% | 23.7 | 10.7x | 0.4x |
| Bond** | 90 | 90 | -0.38 | -0.42% | 9 | 36,989 | 0.8% | 1.0 | 0.0% | NM | NM | BSCCL | 37,862 | 0.8% | 116.0 | 16.4x | 3.4x |

| Top Ten Gainers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|-----------------|-------------------|--------|-------------------|-------|-------|
| BDCOM | 36.3 | +10.0% | 311.0 | 24.2x | 2.3x |
| HAKKANIPUL | 79.7 | +9.9% | 80.0 | NM | 3.3x |
| SEAPEARL | 85.5 | +9.9% | 98.3 | NM | 7.4x |
| JHRML | 115.8 | +9.7% | 645.0 | 39.1x | 3.8x |
| BIFC | 10.4 | +9.5% | 9.4 | NM | NM |
| NORTHERN | 288.3 | +8.8% | 16.9 | NM | 3.5x |
| RAHIMTEXT | 239.9 | +8.7% | 24.1 | NM | 6x |
| ORIONINFU | 467.4 | +8.7% | 49.9 | NM | 34.5x |
| BEACONPHAR | 321.6 | +8.7% | 98.5 | 79.4x | 12.7x |
| JUTESPINN | 227.7 | +8.6% | 24.5 | NM | NM |

| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|----------------|-------------------|-------|-------------------|-------|-------|
| BAYLEASING | 23.9 | -5.5% | 11.2 | NM | 1.3x |
| SIMTEX | 18.6 | -3.6% | 16.4 | 21.8x | 1x |
| DACCADYE | 18.7 | -3.6% | 27.5 | 20.3x | 0.5x |
| IPDC | 66.4 | -3.2% | 143.8 | 27.0x | 3.9x |
| IDLC | 51.2 | -2.8% | 41.7 | 10.6x | 1.2x |
| GEMINISEA | 435.8 | -2.7% | 53.6 | 24.0x | 75.7x |
| BDWELDING | 30.5 | -2.6% | 21.0 | NM | 2.7x |
| FEKDIL | 19.9 | -2.5% | 26.9 | 30.1x | 1.0x |
| UNITEDFIN | 16.0 | -2.4% | 7.4 | 18.5x | 1.0x |
| PRIMEFIN | 12.4 | -2.4% | 12.5 | 30.9x | 1.1x |

| Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE | PB |
|----------------------------|--------------------------|----------------------------|-------|-------|
| SQURPHARMA | 121,801 | 7.0% | 10.1x | 1.9x |
| BEXIMCO | 82,709 | 4.7% | 8.3x | 1.5x |
| BATBC | 74,086 | 4.2% | 18.1x | 7.4x |
| RENATA | 68,288 | 3.9% | 25.3x | 4.9x |
| BXPBARMA | 55,723 | 3.2% | 13.9x | 2.0x |
| BEACONPHAR | 52,003 | 3.0% | 79.4x | 12.7x |
| GP | 38,700 | 2.2% | 11.4x | 7.7x |
| LHBL | 31,913 | 1.8% | 23.2x | 5.1x |
| BRACBANK | 30,976 | 1.8% | 11.3x | 1.0x |
| EBL | 24,179 | 1.4% | 7.7x | 1.1x |
| ISLAMIBANK | 23,721 | 1.4% | 10.8x | 0.8x |
| NBL | 19,116 | 1.1% | NM | 0.5x |
| PUBALIBANK | 19,089 | 1.1% | 5.7x | 0.7x |
| CITYBANK | 18,584 | 1.1% | 4.9x | 0.7x |
| ORIONPHARM | 18,495 | 1.1% | 28.3x | 1.4x |
| OLYMPIC | 16,434 | 0.9% | 18.5x | 3.0x |
| ROBI | 15,714 | 0.9% | NM | 2.4x |
| BSRMLTD | 15,218 | 0.9% | 5.2x | 0.7x |
| ALARABANK | 14,609 | 0.8% | 12.0x | 1.1x |
| IFIC | 14,406 | 0.8% | 12.5x | 0.8x |

| Most Traded Share | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|-------------------|-------------------|--------|-------------------|-------|------|
| BEXIMCO | 135.9 | +0.7% | 1,808.3 | 8.3x | 1.5x |
| ORIONPHARM | 116.2 | +0.9% | 959.6 | 28.3x | 1.4x |
| JHRML | 115.8 | +9.7% | 645.0 | 39.1x | 3.8x |
| BDCOM | 36.3 | +10.0% | 311.0 | 24.2x | 2.3x |
| NAHEEACP | 76.0 | -1.2% | 297.2 | 26.1x | 4.0x |
| UNIQUEHRL | 68.5 | +5.2% | 291.4 | 23.4x | 0.7x |
| DELTALIFE | 155.5 | +3.1% | 238.7 | NM | NM |
| SPCERAMICS | 48.1 | +0.6% | 212.4 | NM | 1.5x |
| LHBL | 77.8 | - | 195.9 | 23.2x | 5.1x |
| BSC | 135.4 | -0.6% | 192.7 | 10.0x | 2.0x |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| IPDC | 75.0 | 65.0 | 4.0 | 2,504 | 187.23 |
| ORIONINFU | 467.4 | 392.2 | 23.0 | 358 | 140.80 |
| SONALIPAPR | 700.0 | 690.0 | 2.0 | 69 | 47.67 |
| NBL | 9.1 | 9.1 | 1.0 | 3,000 | 27.30 |
| PTL | 77.0 | 77.0 | 5.0 | 291 | 22.41 |
| FORTUNE | 85.0 | 79.5 | 6.0 | 242 | 19.33 |
| SEAPEARL | 81.1 | 75.0 | 8.0 | 201 | 15.66 |
| SONALILIFE | 58.0 | 58.0 | 1.0 | 200 | 11.60 |
| NAHEEACP | 84.5 | 73.0 | 2.0 | 130 | 10.64 |
| APEXTANRY | 128.7 | 128.7 | 2.0 | 78 | 10.04 |

*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.

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| IPDC | 75.0 | 65.0 | 187.2 | 2,504 | 4 |
| ORIONINFU | 467.4 | 392.2 | 140.8 | 358 | 23 |
| SONALIPAPR | 700.0 | 690.0 | 47.7 | 69 | 2 |
| NBL | 9.1 | 9.1 | 27.3 | 3,000 | 1 |
| PTL | 77.0 | 77.0 | 22.4 | 291 | 5 |
| FORTUNE | 85.0 | 79.5 | 19.3 | 242 | 6 |
| SEAPEARL | 81.1 | 75.0 | 15.7 | 201 | 8 |
| SONALILIFE | 58.0 | 58.0 | 11.6 | 200 | 1 |
| NAHEEACP | 84.5 | 73.0 | 10.6 | 130 | 2 |
| APEXTANRY | 128.7 | 128.7 | 10.0 | 78 | 2 |
| RENATA | 1,303.2 | 1,303.2 | 10.0 | 8 | 1 |
| IBP | 22.9 | 22.3 | 7.9 | 348 | 2 |
| EGEN | 55.0 | 55.0 | 5.5 | 100 | 1 |
| BEXGSUKUK | 86.5 | 86.5 | 4.3 | 50 | 1 |
| BDCOM | 36.3 | 35.8 | 4.2 | 115 | 2 |
| ORIONPHARM | 120.0 | 120.0 | 3.6 | 30 | 1 |
| NPOLYMER | 67.9 | 67.9 | 3.4 | 50 | 1 |
| BEXIMCO | 148.0 | 148.0 | 3.1 | 21 | 1 |
| AMCL(PRAN) | 333.0 | 333.0 | 3.0 | 9 | 1 |
| DGIC | 40.0 | 40.0 | 2.8 | 70 | 1 |
| SHEPHERD | 26.0 | 24.0 | 2.3 | 93 | 2 |
| FAREASTLIF | 93.3 | 93.3 | 2.2 | 24 | 1 |
| Total | | | 567.3 | | 94 |

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|---|-------------|----------|-------|-------------|-----------|
| | | Stock | Cash | | |
| Sandhani Life Insurance Company Ltd. | - | 0.0% | 12.0% | Record Date | 21-Sep-22 |
| Meghna Life Insurance Co. Ltd. | - | 10.0% | 15.0% | Record Date | 25-Sep-22 |
| Pragati Life Insurance Ltd. | - | 6.0% | 0.0% | Record Date | 26-Sep-22 |
| The IBN SINA Pharmaceutical Industry Ltd. | - | 0.0% | 60.0% | Record Date | 29-Sep-22 |
| Apex Tannery Limited | - | 0.0% | 10.0% | Record Date | 3-Oct-22 |
| Bay Leasing & Investment Limited | - | 5.0% | 0.0% | Record Date | 6-Oct-22 |
| Summit Power Limited | - | 0.0% | 20.0% | Record Date | 6-Oct-22 |
| Phoenix Finance and Investments Ltd. | - | 0.0% | 0.0% | Record Date | 13-Oct-22 |
| Bangladesh Industrial Fin. Co. Ltd. | - | 0.0% | 0.0% | Record Date | 20-Oct-22 |
| Meghna Insurance Company Limited | - | 0.0% | 3.0% | Record Date | 24-Oct-22 |

Important DSE News

BAYLEASING

The Board of Directors has recommended 5% stock dividend for the year ended December 31, 2021. Date of AGM: 30.10.2022, Time: 11:00 AM, Venue: Digital Platform. Record Date: 06.10.2022 only for the shareholders' decision in the general meeting (not for entitlement) and such stock dividend shall be subject to approval of the Regulatory Authorities. Record date for entitlement of Stock Dividend will be notified later after getting approval from Regulatory Authorities. The Company has also reported Consolidated EPS of Tk. (0.99), Consolidated NAV per share of Tk. 17.82 and Consolidated NOCFPS of Tk. (0.48) for the year ended December 31, 2021 as against Tk. 1.14, Tk. 19.80 and Tk. 5.94 respectively for the same period of the previous year. Reason for significant deviation in EPS and NOCFPS: Consolidated EPS has decreased due to Profit after tax has drastically fallen because of increase of provision by 1343.01% though increase of operational income by 68.36%. Total provision has been kept against Lease/Loans and investment in share of Tk. 97.72 crore (additional 57.72 crore has been added for the year end 2021). Consolidated NOCFPS has also decreased by 91.12% due to poor recovery from Lease/Loans and encashment of Bank Deposits/Treasury placements.

SUMITPOWER

The Board of Directors has recommended 20% Cash Dividend for the year ended June 30, 2022. Date of AGM: 31.10.2022, Time: 11:30 AM, Venue: Digital Platform. Record Date: 06.10.2022. The Company has also reported Consolidated EPS of Tk. 3.87, Consolidated NAV per share of Tk. 35.72 and Consolidated NOCFPS of Tk. 5.91 for the year ended June 30, 2022 as against Tk. 5.25, Tk. 34.45 and Tk. 8.53 respectively for the same period of the previous year. The Company also informed that no dividend has been declared out of the capital reserve account or the revaluation reserve account or any unrealized gain or out of profit earned prior to the incorporation of the Company, if any, or through reducing paid-up capital or through doing anything so that the post dividend retained earnings become negative or a debit balance.

NCCBANK

Mrs. Sohela Hossain, one of the Sponsor Directors of the Company, has further informed that she has completed her buying of 20,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 04.09.2022.

NCCBANK

Mr. M.A. Quasem, one of the Sponsors of the Company, has further informed that he has completed his sale of 2,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 06.09.2022

MATINSPINN

The Company has informed that the Board of Directors has approved the purchase of 03 (three) low Gas consuming Generators and 1(one) Diesel Generator from Daud Machinery Trading DWC -LLC, Unit- 401, Level- 4, Building -A3, Dubai South Business Park, Dubai 712206, UAE for replacement of old 4 (four) Gas Generators. The total cost of Generators and installation cost is estimated at USD 2,708,000.00 equivalent to Tk. 25,72,60,000.00 (taka twenty-five crore seventy-two lac sixty thousand only).

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