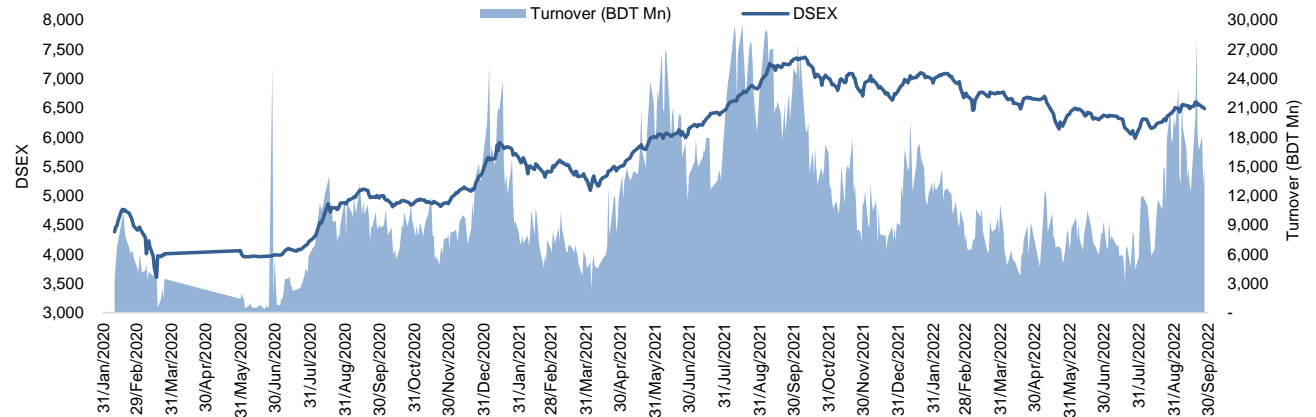


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.34%) lost 21.93 points and closed at 6,489.05. The blue-chip index DS30 (-0.66%), the Shariah-based index DSES (-0.52%), and the large-cap index CDSET (-0.71%) closed at 2,316.42, 1,413.25, and 1,262.32 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.66% followed by Pharmaceutical (-0.39%), Engineering (-0.25%), NBF1 (-0.19%), Bank (-0.16%), Telecommunication (-0.07%), and Food & Allied (+0.05%), respectively. Block trades contributed 1.0% of the overall market turnover. Orion Pharma Ltd. (+2.8%) was the most traded share with a turnover of BDT 1,192 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,489.05	6,510.98	-21.93	-0.34%	-4.0%
DS30	2,316.42	2,331.89	-15.47	-0.66%	-8.5%
DSES	1,413.25	1,420.67	-7.42	-0.52%	-1.2%
CDSET	1,262.32	1,271.31	-8.99	-0.71%	-7.1%

	Advanced	Declined	Unchanged	Total
All Category	61	136	175	372
A Category (Equity)	39	102	112	253
B Category (Equity)	20	31	42	93
N Category (Equity)	1	1	4	6
Z Category (Equity)	1	2	17	20
Mutual Funds	0	1	29	30
Corporate Bonds	1	1	1	3

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,188,358	5,200,176	-0.2%
	Mn USD	49,998	50,111	
Turnover	Mn BDT	14,941	13,002	+14.9%
	Mn USD	144	125	
Volume	Mn Shares	279	218	+28.1%
No. of Trade		221,623	207,027	+7.1%

* Average Interbank Exchange Rate is BDT 103.77 as of Sep 26, 2022

Figure: Sectorial Turnover (BDT)

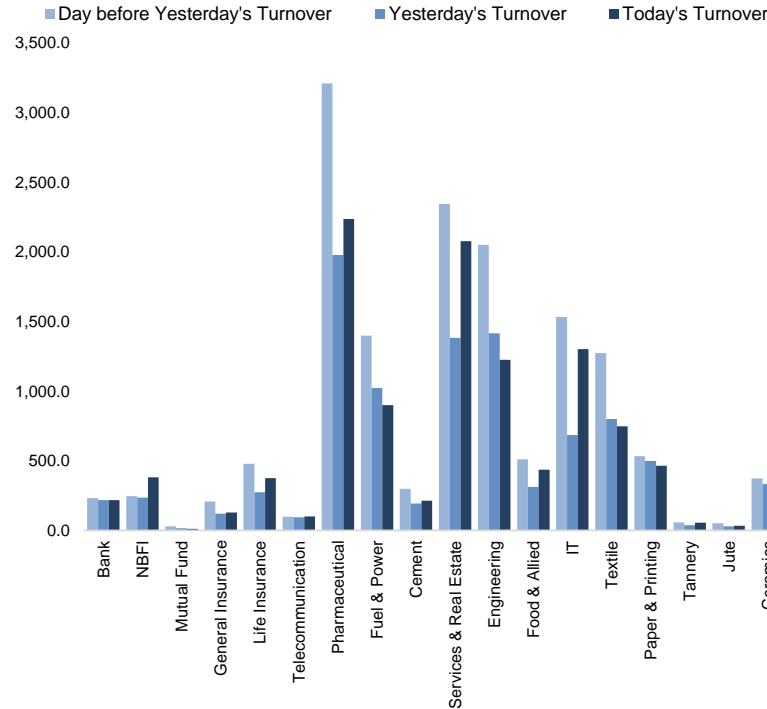
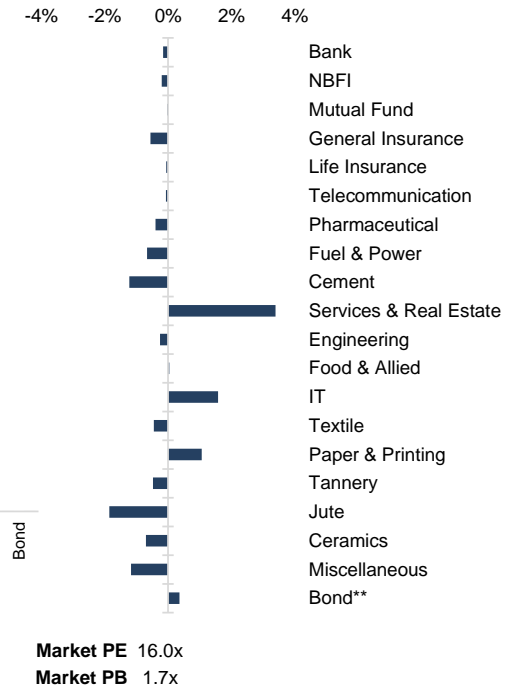


Figure: Sectorial Mcap Change



Market PE 16.0x
Market PB 1.7x

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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	1,442	1,445	-2.25	-0.16%	33	665,020	14.5%	218.2	1.6%	7.7x	0.8x	GP	386,996	8.4%	47.2	11.4x	7.7x
NBFI	1,988	1,992	-3.88	-0.19%	23	193,900	4.2%	380.3	2.8%	NM	3.8x	WALTONHIL	317,378	6.9%	0.1	26.1x	3.1x
Mutual Fund	854	854	-0.25	-0.03%	36	37,611	0.8%	11.5	0.1%	NM	0.8x	BATBC	280,098	6.1%	36.1	18.1x	7.4x
General Insurance	3,161	3,179	-17.61	-0.55%	41	91,670	2.0%	129.3	0.9%	14.8x	1.5x	SQURPHARMA	185,977	4.1%	30.7	10.0x	1.9x
Life Insurance	2,464	2,465	-1.49	-0.06%	13	68,670	1.5%	375.6	2.8%	NM	NM	ROBI	157,138	3.4%	0.4	NM	2.4x
Telecommunication	4,958	4,962	-3.23	-0.07%	3	581,732	12.7%	100.2	0.7%	15.5x	4.6x	RENATA	139,694	3.0%	3.9	25.2x	4.9x
Pharmaceutical	3,929	3,945	-15.55	-0.39%	32	750,011	16.3%	2,236.7	16.4%	18.5x	2.7x	UPGDCL	135,823	3.0%	20.6	11.0x	4.1x
Fuel & Power	1,733	1,745	-11.53	-0.66%	23	457,044	10.0%	900.1	6.6%	11.5x	1.2x	BEXIMCO	114,009	2.5%	941.0	7.9x	1.5x
Cement	2,566	2,598	-31.83	-1.22%	7	123,261	2.7%	213.2	1.6%	26.8x	2.7x	LHBL	86,406	1.9%	200.4	22.1x	4.9x
Services & Real Estate	1,960	1,896	+64.32	+3.39%	8	77,441	1.7%	2,077.5	15.2%	95.9x	1.5x	BERGERPBL	81,166	1.8%	1.3	26.3x	7.1x
Engineering	4,575	4,587	-11.61	-0.25%	42	537,083	11.7%	1,224.4	9.0%	20.2x	1.9x	MARICO	76,636	1.7%	1.3	21.9x	33.3x
Food & Allied	21,384	21,374	+9.75	+0.05%	21	381,029	8.3%	435.8	3.2%	22.9x	8.0x	BXPBARMA	76,017	1.7%	99.0	13.3x	1.9x
IT	2,946	2,900	+45.82	+1.58%	11	38,407	0.8%	1,302.6	9.5%	31.2x	2.7x	ICB	75,988	1.7%	6.1	43.0x	1.7x
Textile	1,679	1,687	-7.58	-0.45%	58	176,634	3.8%	748.0	5.5%	26.5x	1.1x	BEACONPHAR	70,778	1.5%	29.6	75.7x	12.1x
Paper & Printing	11,144	11,027	+117.19	+1.06%	6	42,936	0.9%	463.6	3.4%	NM	3.0x	BRACBANK	57,619	1.3%	1.0	11.3x	1.0x
Tannery	3,126	3,141	-14.83	-0.47%	6	33,664	0.7%	54.9	0.4%	35.6x	3.2x	ISLAMIBANK	52,486	1.1%	5.7	10.8x	0.8x
Jute	10,438	10,635	-196.88	-1.85%	3	2,553	0.1%	33.9	0.2%	NM	36.0x	DUTCHBANGL	44,041	1.0%	10.7	7.6x	1.1x
Ceramics	731	736	-5.11	-0.69%	5	33,815	0.7%	421.5	3.1%	31.7x	2.0x	TITASGAS	40,657	0.9%	34.3	12.2x	0.6x
Miscellaneous	4,631	4,686	-54.87	-1.17%	15	259,814	5.7%	2,327.4	17.0%	12.7x	2.2x	POWERGRID	37,988	0.8%	38.3	10.4x	0.4x
Bond**	90	90	+0.33	+0.36%	9	37,281	0.8%	2.3	0.0%	NM	NM	BSCCL	37,598	0.8%	52.5	16.3x	3.4x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
INDEXAGRO	141.2	+9.5%	187.2	24.8x	2.3x
AZIZPIPES	140.2	+9.3%	64.1	NM	NM
MIRAKHTER	64.0	+9.0%	100.0	24.0x	1.4x
ADNTEL	81.2	+9.0%	293.0	31.4x	3.0x
EHL	103.4	+9.0%	633.5	17.6x	1.4x
KEYACOSMET	7.1	+7.6%	187.2	NM	0.6x
RUPALILIFE	75.3	+6.1%	37.1	NM	NM
LOVELLO	42.2	+6.0%	109.5	21.6x	3.3x
NHFIL	50.6	+5.4%	61.4	22.3x	2.7x
SAIFPOWER	35.9	+5.3%	674.6	17.1x	2.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,685	7.0%	10.0x	1.9x
BEXIMCO	79,179	4.5%	7.9x	1.5x
BATBC	74,086	4.2%	18.1x	7.4x
RENATA	68,199	3.9%	25.2x	4.9x
BXPBARMA	53,075	3.0%	13.3x	1.9x
BEACONPHAR	49,545	2.8%	75.7x	12.1x
GP	38,700	2.2%	11.4x	7.7x
BRACBANK	30,976	1.8%	11.3x	1.0x
LHBL	30,519	1.7%	22.1x	4.9x
EBL	23,659	1.4%	7.5x	1.0x
ISLAMIBANK	23,577	1.3%	10.8x	0.8x
ORIONPHARM	22,474	1.3%	34.4x	1.7x
PUBALIBANK	19,582	1.1%	5.8x	0.7x
NBL	19,116	1.1%	NM	0.5x
CITYBANK	18,423	1.1%	4.8x	0.7x
OLYMPIC	15,767	0.9%	17.7x	2.8x
ROBI	15,714	0.9%	NM	2.4x
BSRMLTD	14,850	0.8%	5.1x	0.7x
ALARABANK	14,609	0.8%	12.0x	1.1x
IFIC	13,751	0.8%	12.0x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONPHARM	141.2	+2.8%	1,192.2	34.4x	1.7x
BEXIMCO	130.1	-2.1%	941.0	7.9x	1.5x
SAIFPOWER	35.9	+5.3%	674.6	17.1x	2.2x
EHL	103.4	+9.0%	633.5	17.6x	1.4x
BSC	164.2	-1.2%	625.3	12.2x	2.4x
BDCOM	67.8	+4.8%	515.7	45.3x	4.4x
JHRML	130.7	-1.2%	477.2	44.1x	4.3x
UNIQUEHRL	77.7	+1.8%	459.8	26.5x	0.8x
SPCERAMICS	52.3	+0.6%	333.4	NM	1.6x
ADNTEL	81.2	+9.0%	293.0	31.4x	3.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JUTESPINN	204.9	-7.0%	3.6	NM	NM
MONNOAGML	555.5	-4.3%	18.4	NM	37x
SUNLIFEINS	62.4	-4.0%	13.1	NM	NM
SPCL	94.2	-4.0%	273.9	12.6x	2.4x
ASIAPACINS	46.3	-3.9%	4.1	19.5x	1.9x
GEMINISEA	402.5	-3.7%	38.8	22.2x	69.9x
SINOBANGLA	59.2	-3.6%	31.4	33.5x	2.2x
MALEKSPIN	38.5	-3.5%	223.1	8.9x	0.8x
BEACONPHAR	306.4	-3.4%	29.6	75.7x	12.1x
HWAWELLTEX	46.6	-3.1%	2.2	10.6x	1.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONPHARM	145.0	125.0	11.0	1,253	163.34
SONALIPAPR	657.8	630.0	7.0	194	124.36
FORTUNE	80.3	80.0	3.0	1,398	112.14
IPDC	68.5	68.5	1.0	1,300	89.05
MTB	16.6	16.6	1.0	5,318	88.27
EBL	33.0	33.0	2.0	2,440	80.52
METROSPIN	45.0	42.0	17.0	1,598	68.86
ISLAMIBANK	32.9	32.9	3.0	2,056	67.66
PUBALIBANK	28.5	27.7	2.0	2,092	59.59
INTRACO	40.1	38.8	5.0	1,524	59.16

*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	Important DSE News
ORIONPHARM	145.0	125.0	163.3	1,253	11	
SONALIPAPR	657.8	630.0	124.4	194	7	
FORTUNE	80.3	80.0	112.1	1,398	3	
IPDC	68.5	68.5	89.1	1,300	1	
MTB	16.6	16.6	88.3	5,318	1	
EBL	33.0	33.0	80.5	2,440	2	
METROSPIN	45.0	42.0	68.9	1,598	17	
ISLAMIBANK	32.9	32.9	67.7	2,056	3	
PUBALIBANK	28.5	27.7	59.6	2,092	2	
INTRACO	40.1	38.8	59.2	1,524	5	
ALARABANK	23.6	23.6	58.7	2,487	1	
ORIONINFU	612.9	529.0	54.7	98	5	
SEAPEARL	134.0	127.0	29.3	219	3	
PTL	78.0	78.0	29.3	375	1	
BSC	168.0	167.0	22.7	136	3	
BEACONPHAR	290.2	290.1	18.3	63	2	
EHL	95.0	90.1	15.9	173	10	
BDCOM	60.0	58.5	13.0	220	4	
ADNTEL	77.0	71.8	12.1	157	6	
PRAGATILIF	66.2	66.2	11.5	174	3	
LHBL	83.0	81.5	9.4	114	6	
BATBC	518.7	518.7	8.7	17	2	
Total			1,283.7		143	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Eastern Housing Limited	-	0.0%	20.0%	Record Date	12-Oct-22
Phoenix Finance and Investments Ltd.	-	0.0%	0.0%	Record Date	13-Oct-22
ADN Telecom Limited	-	0.0%	10.0%	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
Doreen Power Generations and Systems Limited	-	12.0%	18.0%	Record Date	6-Nov-22

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