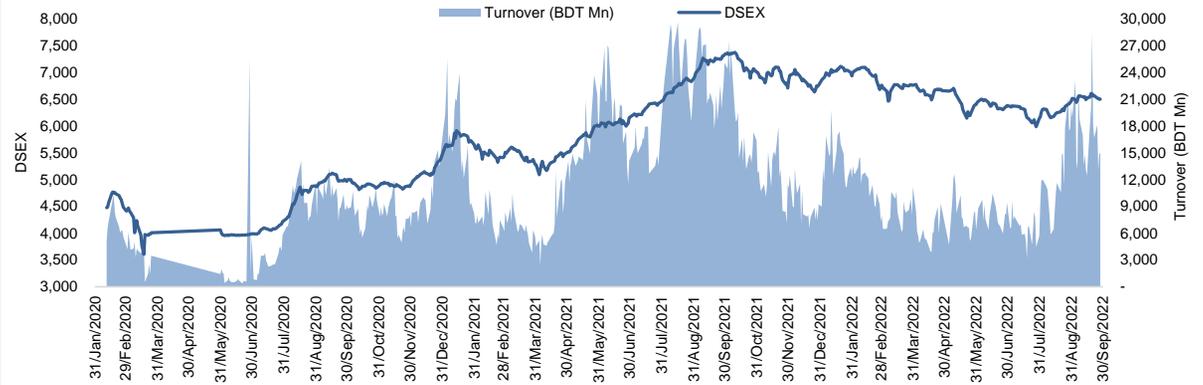


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.11%) gained 7.34 points and closed at 6,496.39. The blue-chip index DS30 (+0.29%), the Shariah-based index DSES (+0.15%), and the large-cap index CDSET (+0.42%) closed at 2,323.13, 1,415.41, and 1,267.67 points, respectively. Large-cap sectors posted mixed performance today. NBF I booked the highest gain of 1.32% followed by Fuel & Power (+0.27%), Engineering (+0.05%). Pharmaceutical experienced the highest loss of 0.25% followed by Food & Allied (-0.18%), Telecommunication (-0.07%), Bank (-0.07%). Block trades contributed 0.8% of the overall market turnover. Bangladesh Export Import Company Ltd. (+3.8%) was the most traded share with a turnover of BDT 1,569 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,496.39	6,489.05	+7.34	+0.11%	-3.9%
DS30	2,323.13	2,316.42	+6.72	+0.29%	-8.3%
DSES	1,415.41	1,413.25	+2.16	+0.15%	-1.1%
CDSET	1,267.67	1,262.32	+5.35	+0.42%	-6.7%

	Advanced	Declined	Unchanged	Total
All Category	72	114	187	373
A Category (Equity)	47	86	120	253
B Category (Equity)	21	24	48	93
N Category (Equity)	1	2	3	6
Z Category (Equity)	3	2	16	21
Mutual Funds	2	0	28	30
Corporate Bonds	0	1	1	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,191,677	5,188,358	
	Mn USD	50,802	50,769	+0.1%
Turnover	Mn BDT	14,845	14,941	
	Mn USD	145	146	-0.6%
Volume	Mn Shares	224	279	-19.6%
No. of Trade		206,268	221,623	-6.9%

* Average Interbank Exchange Rate is BDT 102.20 as of Sep 27, 2022

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Figure: Sectorial Turnover (BDT)

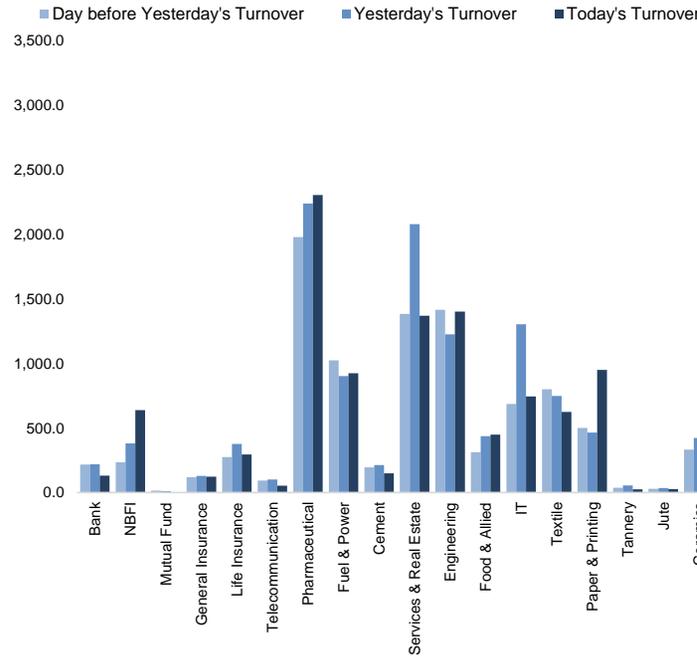
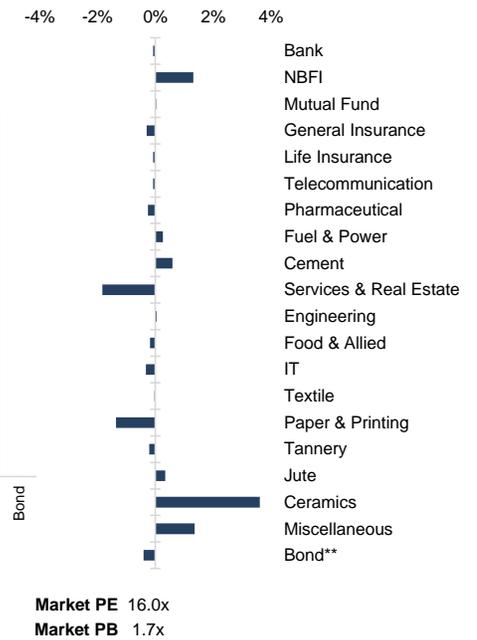


Figure: Sectorial Mcap Change



Market PE 16.0x
Market PB 1.7x

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	1,447	1,448	-1.02	-0.07%	33	664,550	14.5%	130.9	0.9%	7.7x	0.8x	GP	386,996	8.4%	3.8	11.4x	7.7x
NBFI	2,018	1,991	+26.22	+1.32%	23	196,453	4.3%	636.7	4.6%	NM	3.9x	WALTONHIL	317,378	6.9%	0.1	26.1x	3.1x
Mutual Fund	857	856	+0.25	+0.03%	36	37,622	0.8%	3.2	0.0%	NM	0.8x	BATBC	280,098	6.1%	43.9	18.1x	7.4x
General Insurance	3,155	3,165	-9.47	-0.30%	41	91,395	2.0%	122.0	0.9%	14.7x	1.5x	SQURPHARMA	185,977	4.1%	26.8	10.0x	1.9x
Life Insurance	2,435	2,437	-1.91	-0.08%	13	68,616	1.5%	294.4	2.1%	NM	NM	ROBI	157,138	3.4%	3.0	NM	2.4x
Telecommunication	4,956	4,959	-3.66	-0.07%	3	581,304	12.7%	52.1	0.4%	15.5x	4.6x	RENATA	139,694	3.0%	1.0	25.2x	4.9x
Pharmaceutical	3,894	3,904	-9.94	-0.25%	32	748,101	16.3%	2,303.0	16.5%	18.4x	2.7x	UPGDCL	137,098	3.0%	4.9	11.1x	4.2x
Fuel & Power	1,751	1,746	+4.68	+0.27%	23	458,269	10.0%	923.5	6.6%	11.6x	1.2x	BEXIMCO	118,391	2.6%	1,568.8	8.2x	1.5x
Cement	2,545	2,529	+15.09	+0.60%	7	123,997	2.7%	147.7	1.1%	27.0x	2.7x	LHBL	87,219	1.9%	140.5	22.4x	4.9x
Services & Real Estate	2,005	2,042	-37.41	-1.83%	8	76,022	1.7%	1,367.9	9.8%	94.2x	1.5x	BERGERPBL	80,897	1.8%	1.0	26.2x	7.1x
Engineering	4,601	4,599	+2.32	+0.05%	42	537,354	11.7%	1,400.2	10.0%	20.2x	1.9x	MARICO	76,621	1.7%	2.4	21.9x	33.3x
Food & Allied	21,422	21,462	-39.67	-0.18%	21	380,324	8.3%	448.6	3.2%	22.8x	8.0x	BXPHARMA	76,330	1.7%	112.8	13.3x	1.9x
IT	2,984	2,994	-9.70	-0.32%	11	38,283	0.8%	743.4	5.3%	31.1x	2.7x	ICB	76,311	1.7%	3.8	43.2x	1.7x
Textile	1,670	1,671	-0.52	-0.03%	58	176,580	3.8%	623.7	4.5%	26.5x	1.1x	BEACONPHAR	71,264	1.6%	57.9	76.2x	12.2x
Paper & Printing	11,358	11,515	-156.88	-1.36%	6	42,351	0.9%	949.8	6.8%	NM	2.9x	BRACBANK	57,619	1.3%	2.3	11.3x	1.0x
Tannery	3,137	3,144	-6.60	-0.21%	6	33,593	0.7%	24.5	0.2%	35.5x	3.2x	ISLAMIBANK	52,486	1.1%	4.0	10.8x	0.8x
Jute	9,968	9,934	+34.32	+0.35%	3	2,562	0.1%	26.6	0.2%	NM	36.2x	DUTCHBANGL	43,832	1.0%	8.5	7.6x	1.1x
Ceramics	766	739	+26.70	+3.61%	5	35,037	0.8%	890.7	6.4%	32.9x	2.1x	TITASGAS	40,459	0.9%	24.3	12.1x	0.6x
Miscellaneous	4,593	4,531	+61.78	+1.36%	15	263,357	5.7%	2,864.1	20.5%	12.9x	2.2x	POWERGRID	37,775	0.8%	27.0	10.3x	0.4x
Bond**	90	90	-0.36	-0.40%	9	37,131	0.8%	0.7	0.0%	NM	NM	BSCCL	37,170	0.8%	45.3	16.1x	3.3x

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
ECABLES	201.0	+10.0%	24.5	NM	24.2x	SQURPHARMA	121,685	7.0%	10.0x	1.9x	BEXIMCO	135.1	+3.8%	1,568.8	8.2x	1.5x
SPCERAMICS	57.2	+9.4%	727.5	NM	1.8x	BEXIMCO	82,222	4.7%	8.2x	1.5x	ORIONPHARM	135.3	-4.2%	1,486.5	33.0x	1.7x
IPDC	69.6	+9.1%	505.6	28.3x	4.1x	BATBC	74,086	4.2%	18.1x	7.4x	SPCERAMICS	57.2	+9.4%	727.5	NM	1.8x
JUTESPINN	222.8	+8.7%	3.0	NM	NM	RENATA	68,199	3.9%	25.2x	4.9x	SONALIPAPR	651.8	-2.6%	638.8	69.1x	3.9x
BENGALWTL	27.5	+7.0%	54.3	57.1x	1.1x	BXPHARMA	53,293	3.0%	13.3x	1.9x	EHL	108.2	+4.6%	593.1	18.4x	1.5x
FUWANGCER	18.7	+5.6%	94.0	64.5x	1.6x	BEACONPHAR	49,884	2.9%	76.2x	12.2x	JHRML	131.1	+0.3%	571.9	44.3x	4.3x
BBS	28.9	+4.7%	351.2	25.9x	2x	GP	38,700	2.2%	11.4x	7.7x	IPDC	69.6	+9.1%	505.6	28.3x	4.1x
EHL	108.2	+4.6%	593.1	18.4x	1.5x	BRACBANK	30,976	1.8%	11.3x	1.0x	BSC	159.2	-3.0%	427.1	11.8x	2.3x
LOVELLO	43.9	+4.0%	122.6	22.4x	3.5x	LHBL	30,806	1.8%	22.4x	4.9x	BBS	28.9	+4.7%	351.2	25.9x	1.9x
ATLASBANG	108.9	+3.9%	5.1	NM	0.9x	EBL	23,733	1.4%	7.5x	1.0x	INTRACO	42.8	+3.1%	295.2	41.0x	3.6x

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)
DGIC	39.0	-5.3%	28.6	28.9x	3.2x	IPDC	70.0	69.5	6.0	3,662	255.32
PAPERPROC	236.8	-5.2%	88.3	77.6x	8x	FORTUNE	83.3	81.0	4.0	1,201	97.49
PENINSULA	38.1	-4.8%	118.4	56.9x	1.3x	PTL	78.0	78.0	2.0	1,095	85.41
IBP	21.1	-4.5%	55.4	20.8x	1.5x	SONALIPAPR	680.0	619.3	7.0	80	54.24
BIFC	10.7	-4.5%	2.8	NM	NM	INTRACO	39.9	38.8	9.0	1,371	53.22
RDFOOD	39.0	-4.4%	73.9	26.2x	2.5x	AL-HAJTEX	139.5	134.0	9.0	296	40.29
KEYACOSMET	6.8	-4.2%	40.2	NM	0.5x	ORIONPHARM	145.0	133.0	6.0	283	39.88
ORIONPHARM	135.3	-4.2%	1,486.5	33.0x	1.7x	ORIONINFU	535.0	530.0	3.0	63	33.46
MONOSPOOL	192.9	-4.0%	41.0	63.4x	4.6x	BEXGSUKUK	88.0	88.0	3.0	379	33.35
FINEFOODS	60.4	-3.7%	42.4	NM	5.7x	TOSRIFA	24.7	24.2	4.0	1,268	30.74

*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	70.0	69.5	255.3	3,662	6
FORTUNE	83.3	81.0	97.5	1,201	4
PTL	78.0	78.0	85.4	1,095	2
SONALIPAPR	680.0	619.3	54.2	80	7
INTRACO	39.9	38.8	53.2	1,371	9
AL-HAJTEX	139.5	134.0	40.3	296	9
ORIONPHARM	145.0	133.0	39.9	283	6
ORIONINFU	535.0	530.0	33.5	63	3
BEXGSUKUK	88.0	88.0	33.4	379	3
TOSRIFA	24.7	24.2	30.7	1,268	4
METROSPIN	46.6	44.0	24.2	544	10
BSCCL	225.0	225.0	18.0	80	1
BXPHERMA	170.0	170.0	17.0	100	1
GSPFINANCE	30.3	30.3	9.1	301	1
DGIC	41.5	41.5	7.9	190	1
FEKDIL	22.2	22.2	6.7	300	1
BEACONPHAR	332.1	332.1	6.6	20	1
BATBC	520.0	518.7	6.4	12	2
DELTALIFE	163.9	163.9	5.7	35	1
INDEXAGRO	145.0	145.0	5.2	36	4
HRTEX	127.5	127.5	5.0	39	1
BPML	90.0	87.9	3.9	43	2
Total			890.7		118

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

Important DSE News
PTL

The Company has informed that the Board of Directors has decided to sell company's entire holding i.e. 22,68,400 shares of Meghna Bank Limited in consideration of the sum of BDT 3,00,00,000.00 (three Crore) only in favor of Ms. Imrana Zaman Chowdhury (general shareholder), NID no. 7319798984.

NCCBANK

Dhaka Stock Exchange Limited (DSE) has accorded its consent to transfer of 2,00,000 shares of National Credit and Commerce Bank Limited from Mr. Aslam Ul Karim, one of the Sponsors of the Company (the transferor/pledgor) to Bangladesh Industrial Finance Company Limited (the transferee/pledgee) outside the trading system of the exchange within 30 working days from the date of approval by DSE (i.e. September 11, 2022), under Regulations - 47 and 57(2) of the Dhaka Stock Exchange (Listing) Regulations, 2015.

ISLAMIBANK

Engr. Mustafa Anwar, one of the Sponsors of the Company, has further informed that he has completed his sale of 2,26,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 18.09.2022.

OIMEX

Ms. Nawshin Tasnim one of the Directors of the Company, has expressed her intention to transfer her total holdings 13,41,929 shares of the company to JO Holdings Limited (233 shares) and NJ Holdings Limited (13,41,696 shares) respectively, outside the trading system of the Exchange other than by way of gift within next 30 working days from the date of issuance of approval letter (i.e. September 14, 2022) by BSEC. After execution the buyer will nominate 1 or more individuals as nominated/representative directors against the transferred 30.01% shares in the board of Oimex Electrodes Limited to maintain uninterrupted holding of shares by directors. The Directors shall collectively hold a minimum of 30% shares of the total shares, which shall be subject to lock-in.

OIMEX

Mr. M. A. Maleque one of the Sponsor Directors of the company, has expressed his intention to transfer his total holdings 1,44,93,290 shares of the Company to JO Holdings Limited, outside the trading system of the Exchange other than by way of gift within next 30 working days from the date of issuance of approval letter (i.e. September 14, 2022) by BSEC. After the buyer will nominate 1 or more individuals as nominated/representative directors against the transferred 30.01% shares in the board of Oimex Electrodes Limited to maintain uninterrupted holding of shares by directors. The Directors shall collectively hold a minimum of 30% shares of the total shares, which shall be subject to lock-in.

OIMEX

Mrs. Khairun Nesa Lucky one of the Sponsor Directors of the company, has expressed her intention to transfer her total holdings 42,97,965 shares of the Company to JO Holdings Limited (29,56,269 shares) and Oppenhaffen Holdings Limited (13,41,696 shares) respectively, outside the trading system of the Exchange other than by way of gift within next 30 working days from the date of issuance of approval letter (i.e. September 14, 2022) by BSEC. After execution the buyer will nominate 1 or more individuals as nominated/representative directors against the transferred 30.01% shares in the board of Oimex Electrodes Limited to maintain uninterrupted holding of shares by directors. The Directors shall collectively hold a minimum of 30% shares of the total shares, which shall be subject to lock-in.

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