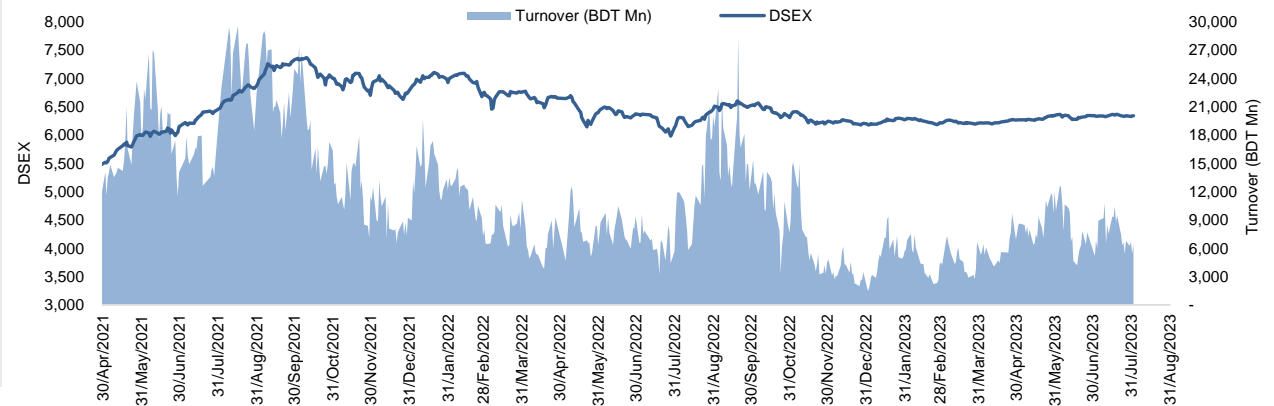


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.07%) gained 4.23 points and closed at 6,343.00. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.09%) closed at 2,160.96, 1,375.83, and 1,210.96 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.13% followed by Fuel & Power (+0.11%), Engineering (+0.07%), Food & Allied (+0.04%). Bank experienced the highest loss of 0.14% followed by NBFI (-0.03%), Telecommunication (0.00%). Block trades contributed 10.7% of the overall market turnover. JMI Hospital Requisite Manufacturing Limited (+1.7%) was the most traded share with a turnover of BDT 303 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,343.00	6,338.77	+4.23	+0.07%	+2.2%
DS30	2,160.96	2,160.67	+0.29	+0.01%	-1.6%
DSES	1,375.83	1,373.89	+1.95	+0.14%	+1.3%
CDSET	1,210.96	1,209.93	+1.03	+0.09%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	78	87	164	329
A Category (Equity)	42	52	115	209
B Category (Equity)	27	28	42	97
N Category (Equity)	0	3	1	4
Z Category (Equity)	9	4	6	19
Mutual Funds	1	1	17	19
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,819,302	7,818,027	+0.0%
	Mn USD	71,409	71,398	
Turnover	Mn BDT	6,392	5,465	+17.0%
	Mn USD	58	50	
Volume	Mn Shares	117	107	+9.5%
No. of Trade		141,957	128,570	+10.4%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 01, 2023

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Figure: Sectorial Turnover (BDT Mn)

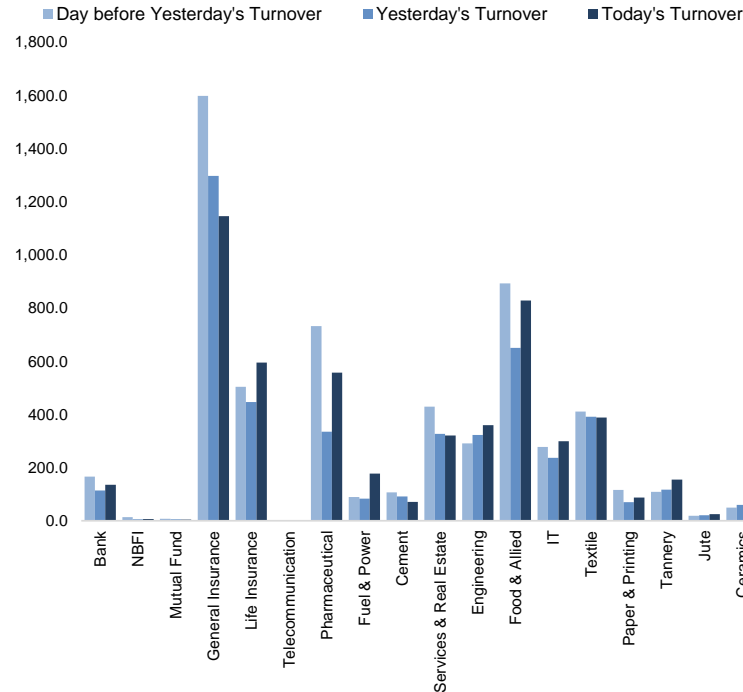
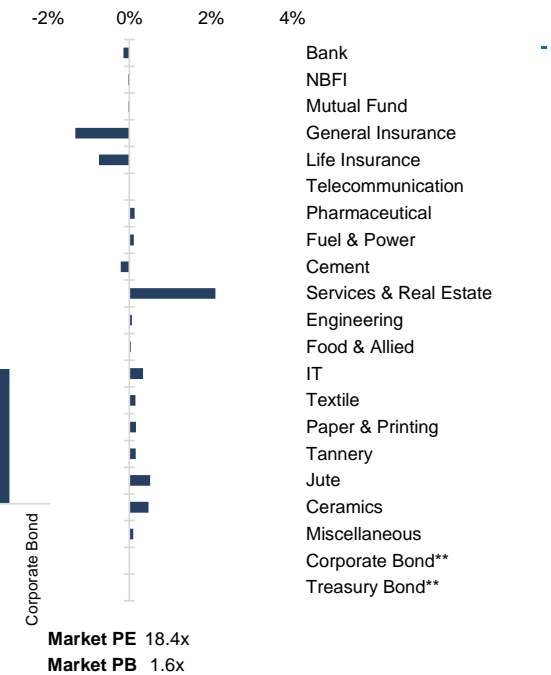


Figure: Sectorial Mcap Change



* 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	1,454	1,456	-2.04	-0.14%	35	685,328	9.2%	135.9	2.4%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,921	1,922	-0.62	-0.03%	23	186,975	2.5%	6.8	0.1%	NM	4.6x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	831	831	-0.20	-0.02%	37	37,591	0.5%	4.9	0.1%	NM	0.7x	BATBC	280,098	6.1%	0.2	15.4x	6.2x
General Insurance	3,634	3,683	-48.70	-1.32%	42	106,060	1.4%	1,145.6	20.1%	19.7x	1.7x	SQURPHARMA	186,509	4.1%	41.0	9.9x	1.7x
Life Insurance	2,835	2,856	-21.16	-0.74%	15	79,245	1.1%	595.0	10.4%	NM	NM	ROBI	157,138	3.4%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	0.4	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,710	3,705	+4.80	+0.13%	34	719,601	9.7%	557.4	9.8%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,701	1,699	+1.89	+0.11%	23	448,584	6.0%	177.9	3.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,563	2,569	-5.47	-0.21%	7	123,108	1.7%	71.1	1.2%	27.1x	2.7x	BERGERPBL	83,675	1.8%	8.9	27.3x	6.0x
Services & Real Esta	1,980	1,939	+40.97	+2.11%	8	78,216	1.1%	320.6	5.6%	26.6x	1.0x	LHBL	79,206	1.7%	29.4	13.5x	4.0x
Engineering	4,515	4,512	+3.00	+0.07%	42	529,902	7.1%	359.4	6.3%	69.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,580	21,573	+7.80	+0.04%	21	399,320	5.4%	828.8	14.5%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,224	3,213	+10.93	+0.34%	11	42,029	0.6%	299.1	5.2%	29.4x	3.0x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,647	1,644	+2.46	+0.15%	58	172,412	2.3%	388.2	6.8%	80.4x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,688	10,671	+17.17	+0.16%	6	41,182	0.6%	87.5	1.5%	39.7x	2.1x	ISLAMIBANK	52,486	1.2%	0.2	8.4x	0.7x
Tannery	3,259	3,254	+5.16	+0.16%	6	34,420	0.5%	155.4	2.7%	47.1x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,632	16,547	+84.98	+0.51%	3	4,069	0.1%	24.9	0.4%	NM	-1412.4x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	685	682	+3.22	+0.47%	5	31,700	0.4%	43.2	0.8%	52.6x	1.9x	UNILEVERCL	39,123	0.9%	1.9	45.2x	22.2x
Miscellaneous	4,218	4,213	+4.20	+0.10%	14	229,634	3.1%	506.7	8.9%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.02%	10	36,590	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	89	89	+0.00	+0.00%	232	2,851,907	38.4%	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
CVOPRL	180.1	+9.9%	99.5	NM	25.0x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	JHRML	86.0	+1.7%	302.9	37.2x	2.7x
LIBRAINFU	844.4	+6.8%	40.6	NM	0.7x	BATBC	74,086	4.2%	15.4x	6.2x	FUWANGFOOD	35.3	-2.5%	231.7	NM	8.9x
CNATEX	11.2	+5.7%	18.8	23.1x	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	220.9	+5.1%	217.8	32.0x	12.8x
GQBALLPEN	143.4	+5.4%	15.6	NM	1.2x	RENATA	68,042	3.9%	38.0x	4.6x	BSC	125.1	-	203.8	8.0x	1.6x
SEAPEARL	220.9	+5.1%	217.8	32.0x	12.8x	BXPHARMA	45,564	2.6%	14.6x	1.5x	KBPPWBIL	33.2	-1.5%	182.9	NM	2.8x
METROSPIN	44.7	+4.7%	153.5	45.7x	2.1x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	GEMINISEA	819.8	+0.8%	179.0	39.1x	32.3x
GENNEXT	6.9	+4.5%	32.8	NM	1x	GP	38,700	2.2%	11.9x	7.3x	DELTALIFE	154.2	-3.1%	158.9	NM	NM
NORTHERN	214.1	+4.4%	1.0	NM	2.6x	BRACBANK	30,964	1.8%	8.3x	0.9x	CONTININS	45.6	-1.7%	157.2	76.0x	2.1x
MEGHNA PET	33.8	+4.3%	1.6	NM	NM	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	METROSPIN	44.7	+4.7%	153.5	45.7x	2.1x
EMERALDOIL	150.0	+4.2%	146.4	NM	NM	LHBL	28,936	1.7%	13.5x	4.0x	EMERALDOIL	150.0	+4.2%	146.4	NM	NM
						NBL	19,116	1.1%	NM	0.8x						
						PUBALIBANK	18,880	1.1%	4.7x	0.6x						
						CITYBANK	18,235	1.0%	5.5x	0.7x						
						OLYMPIC	16,995	1.0%	17.8x	2.9x						
						ROBI	15,714	0.9%	69.8x	2.5x						
						ALARABANK	14,417	0.8%	15.8x	1.1x						
						BSRMLTD	14,210	0.8%	NM	0.7x						
						PRIMEBANK	13,629	0.8%	5.1x	0.7x						
						SEAPEARL	13,553	0.8%	32.0x	12.8x						
						UPGDCL	13,547	0.8%	16.7x	4.4x						
	</															

* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	212.0	191.9	213.4	1,019	13
RUPALILIFE	126.0	126.0	181.4	1,440	7
SONALIPAPR	615.9	601.0	35.9	58	4
PRAGATILIF	124.0	119.3	30.9	249	6
KDSALTD	75.9	75.0	30.6	404	4
BEXIMCO	104.1	104.1	29.8	286	5
GREENDEL	85.1	85.1	25.5	300	1
EMERALDOIL	135.0	129.6	19.4	148	3
METROSPIN	42.4	41.5	13.8	327	6
ADNTEL	137.0	133.5	8.8	64	6
SILVAPHL	21.6	21.6	7.9	367	3
BATBC	557.5	479.8	7.9	15	9
FAREASTLIF	74.5	67.5	7.3	107	9
JAMUNABANK	20.2	18.9	6.9	359	8
SAPORTL	30.1	30.1	6.0	200	1
NBL	8.0	8.0	5.3	663	7
FINEFOODS	124.0	124.0	3.7	30	1
DULAMACOT	70.7	64.8	3.4	50	2
SIMTEX	25.3	25.3	3.2	125	1
BXPHERMA	136.0	131.6	3.1	23	6
AOL	33.1	32.9	2.7	81	4
GP	261.6	261.6	2.6	10	5
Total			682.7		164

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PURABIGEN		3.0%	0%	Record Date	6-Aug-23
RUPALILIFE		0.0%	11%	Record Date	17-Aug-23
PADMALIFE		0.0%	0%	Record Date	20-Aug-23
SONALILIFE		0.0%	20%	Record Date	20-Aug-23
MEGHNALIFE		0.0%	20%	Record Date	20-Aug-23
CLICL		0.0%	2%	Record Date	24-Aug-23
SANDHANINS		0.0%	12%	Record Date	27-Aug-23

Important DSE News

BATASHOE

The company has informed that Mr. Debabrata Mukherjee has been appointed as Managing Director of the company with effect from August 13, 2023 and Mr. Riajur Reza Muhammad Faisal, FCS as Company Secretary with effect from August 01, 2023.

PROGRESLIF

The Company has informed that the Board of Directors has appointed Mr. Shahjahan Azadi, Deputy Managing Director as the acting Chief Executive Officer of the company in place of Mr. Ajit Chandra Aich.

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