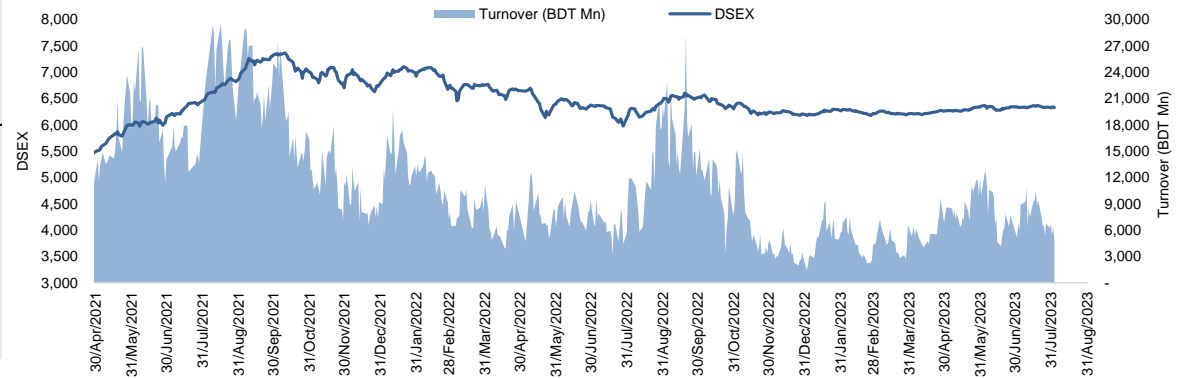


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 13.14 points and closed at 6,329.86. The blue-chip index DS30 (-0.39%), the Shariah-based index DSES (-0.21%), and the large-cap index CDSET (-0.09%) closed at 2,152.52, 1,372.93, and 1,209.88 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.08% followed by Engineering (-0.07%), Pharmaceutical (-0.07%), Fuel & Power (-0.04%), Food & Allied (-0.02%), Telecommunication (0.00%), and NBF (0.02%), respectively. Block trades contributed 4.5% of the overall market turnover. Delta Life Insurance Company Ltd. (-6.4%) was the most traded share with a turnover of BDT 211 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,329.86	6,343.00	-13.14	-0.21%	+2.0%
DS30	2,152.52	2,160.96	-8.43	-0.39%	-1.9%
DSES	1,372.93	1,375.83	-2.90	-0.21%	+1.0%
CDSET	1,209.88	1,210.96	-1.08	-0.09%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	63	98	173	334
A Category (Equity)	34	64	115	213
B Category (Equity)	22	29	45	96
N Category (Equity)	1	1	3	5
Z Category (Equity)	6	4	10	20
Mutual Funds	1	1	22	24
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,813,705	7,819,302	-0.1%
	Mn USD	71,358	71,409	
Turnover	Mn BDT	4,857	6,392	-24.0%
	Mn USD	44	58	
Volume	Mn Shares	89	117	-23.3%
No. of Trade		124,677	141,957	-12.2%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 02, 2023

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	HZ Towhidi Khan Senior Research Associate (880) 1708805224 hztowhidi.khan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

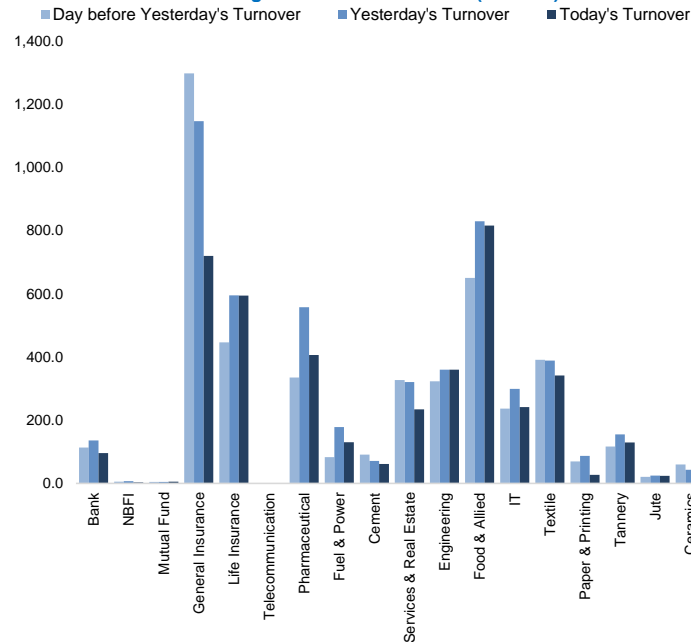
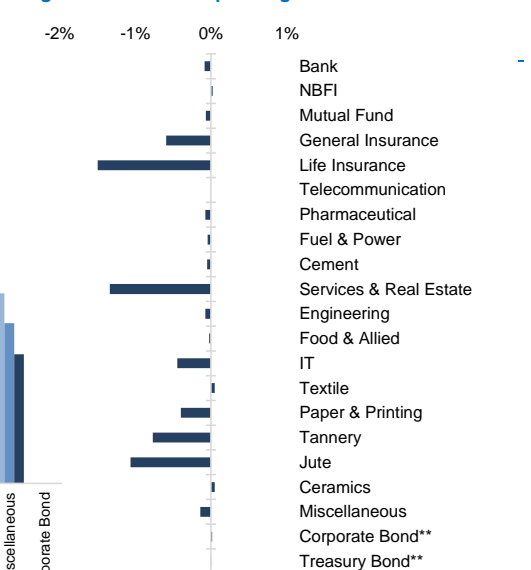


Figure: Sectorial Mcap Change



Market PE 18.4x

Market PB 1.6x

* 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	1,453	1,454	-1.21	-0.08%	35	684,756	9.2%	95.5	2.1%	12.1x	0.7x	GP	386,996	8.5%	0.6	11.9x	7.3x
NBFI	1,922	1,921	+0.44	+0.02%	23	187,018	2.5%	3.5	0.1%	NM	4.6x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	831	831	-0.55	-0.07%	37	37,566	0.5%	5.3	0.1%	NM	0.7x	BATBC	280,098	6.1%	0.5	15.4x	6.2x
General Insurance	3,613	3,634	-21.40	-0.59%	42	105,435	1.4%	719.1	15.5%	19.6x	1.6x	SQURPHARM	186,066	4.1%	21.6	9.9x	1.7x
Life Insurance	2,793	2,835	-42.43	-1.50%	15	78,059	1.1%	593.6	12.8%	NM	NM	ROBI	157,138	3.4%	0.4	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	1.0	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,707	3,710	-2.65	-0.07%	34	719,087	9.7%	406.3	8.8%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,700	1,701	-0.71	-0.04%	23	448,396	6.0%	130.0	2.8%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,562	2,563	-1.24	-0.05%	7	123,048	1.7%	61.8	1.3%	27.1x	2.7x	BERGERPBL	83,935	1.8%	9.3	27.4x	6.0x
Services & Real Esta	1,953	1,980	-26.45	-1.34%	8	77,171	1.0%	234.6	5.1%	26.2x	1.0x	LHBL	79,206	1.7%	34.9	13.5x	4.0x
Engineering	4,512	4,515	-3.37	-0.07%	42	529,507	7.1%	360.0	7.8%	69.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,576	21,580	-4.87	-0.02%	21	399,230	5.4%	815.5	17.6%	20.1x	7.6x	BXPHERMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,209	3,224	-14.31	-0.44%	11	41,842	0.6%	241.2	5.2%	29.3x	3.0x	BRACBANK	57,596	1.3%	0.2	8.3x	0.9x
Textile	1,647	1,647	+0.83	+0.05%	58	172,499	2.3%	341.7	7.4%	80.4x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,646	10,688	-42.49	-0.40%	6	41,018	0.6%	27.5	0.6%	39.6x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,234	3,259	-25.02	-0.77%	6	34,156	0.5%	129.8	2.8%	46.7x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,455	16,632	-176.23	-1.06%	3	4,025	0.1%	23.9	0.5%	NM	-1397.4x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	686	685	+0.34	+0.05%	5	31,716	0.4%	39.0	0.8%	52.6x	1.9x	UNILEVERCL	39,196	0.9%	3.5	45.3x	22.3x
Miscellaneous	4,212	4,218	-5.96	-0.14%	14	229,309	3.1%	408.6	8.8%	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%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	89	89	+0.00	+0.00%	232	2,851,967	38.5%	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
MEGCONMILK	32.3	+9.9%	9.2	21.8x	NM	SQURPHARMA	121,499	7.0%	9.9x	1.7x	DELTALIFE	144.3	-6.4%	210.8	NM	NM
MEGHNAPET	37.1	+9.8%	3.3	NM	NM	BATBC	74,086	4.2%	15.4x	6.2x	FUWANGFOOD	34.4	-2.5%	195.4	NM	8.7x
CONTININS	48.4	+6.1%	131.4	80.7x	2.3x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPPEARL	214.7	-2.8%	163.2	31.1x	12.4x
NAVANAPHAR	106.9	+3.8%	93.8	24.3x	2.6x	RENATA	68,042	3.9%	38.0x	4.6x	JHRML	83.6	-2.8%	147.7	36.2x	2.7x
RAHIMAFOD	251.7	+2.9%	145.4	NM	24.2x	BXPHERMA	45,564	2.6%	14.6x	1.5x	BSC	121.7	-2.7%	146.6	7.8x	1.5x
JUTESPINN	398.2	+2.8%	0.7	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RAHIMAFOD	251.7	+2.9%	145.4	NM	24.2x
MIDASFIN	11.3	+2.7%	0.4	8.5x	1x	GP	38,700	2.2%	11.9x	7.3x	CONTININS	48.4	+6.1%	131.4	80.7x	2.3x
ADNTEL	141.4	+2.5%	68.0	36.7x	5.1x	BRACBANK	30,964	1.8%	8.3x	0.9x	KBPPWBIL	32.5	-2.1%	122.0	NM	2.7x
SONALILIFE	90.8	+2.5%	76.4	NM	NM	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	DESHBANDHU	32.2	+1.3%	119.4	92.0x	1.7x
SIMTEX	24.0	+2.1%	20.7	26.4x	1.1x	LHBL	28,936	1.7%	13.5x	4.0x	PRAGATILIF	139.0	+0.9%	118.3	NM	NM

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)
DELTALIFE	144.3	-6.4%	210.8	NM	NM	ADNTEL	137.0	137.0	3.0	386	52.94
CRYSTALINS	61.5	-3.3%	74.6	18.9x	2x	EMERALDOIL	150.0	138.0	6.0	210	29.91
RUPALIBANK	32.1	-3.0%	49.3	28.5x	0.9x	METROSPIN	44.7	43.1	3.0	372	16.17
CAPMIBLMF	13.2	-2.9%	2.4	NM	1.5x	RDFOOD	55.0	52.6	3.0	246	13.33
LIBRAINFU	820.0	-2.9%	26.5	NM	0.7x	MARICO	2,400.0	2,388.6	11.0	5	11.73
SEAPPEARL	214.7	-2.8%	163.2	31.1x	12.4x	AL-HAJTEX	190.0	188.1	4.0	38	7.20
JHRML	83.6	-2.8%	147.7	36.2x	2.7x	RENATA	1,141.8	1,141.8	2.0	5	6.24
BSC	121.7	-2.7%	146.6	7.8x	1.5x	SONALIPAPR	616.0	616.0	1.0	9	5.73
ECABLES	190.4	-2.7%	9.7	63.0x	0.6x	GP	261.8	261.6	5.0	20	5.28
AL-HAJTEX	195.4	-2.6%	34.5	NM	21.5x	CONTININS	47.5	47.5	1.0	100	4.75

* 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
ADNTEL	137.0	137.0	52.9	386	3
EMERALDOIL	150.0	138.0	29.9	210	6
METROSPIN	44.7	43.1	16.2	372	3
RDFOOD	55.0	52.6	13.3	246	3
MARICO	2,400.0	2,388.6	11.7	5	11
AL-HAJTEX	190.0	188.1	7.2	38	4
RENATA	1,141.8	1,141.8	6.2	5	2
SONALIPAPR	616.0	616.0	5.7	9	1
GP	261.8	261.6	5.3	20	5
CONTININS	47.5	47.5	4.8	100	1
FINEFOODS	123.0	112.0	4.5	39	2
ANWARGALV	213.3	202.9	4.4	21	4
ITC	40.2	40.2	4.0	100	1
LRBDL	33.2	32.8	4.0	120	6
SONALILIFE	87.1	87.1	3.5	40	1
UNIQUEHRL	73.5	73.5	3.1	42	1
SAIFPOWER	29.6	29.6	3.0	100	1
PTL	83.0	69.3	3.0	40	5
ARGONDENIM	19.0	16.4	2.6	143	2
GSPFINANCE	30.3	29.3	2.5	83	4
SUNLIFEINS	52.9	52.9	1.9	35	1
ACFL	24.9	24.9	1.7	70	1
Total			219.4		107

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
SUNLIFEINS		0.0%	0%	Record Date	24-Aug-23

Important DSE News

SUNLIFEINS

The Board of Directors has recommended No dividend for the year ended December 31, 2022. Date of AGM: 19.09.2023, Time: 3:00 PM, Venue: Digital Platform. Record Date: 24.08.2023.

(Q1 Un-audited): As per life revenue account of the company for January to March, 2023, excess of total expenses including claims over total income (deficit) was BDT 97.11 million as against excess of total expenses including claims over total income (deficit) of BDT 104.43 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund as on March 31, 2023 was BDT 472.79 million as against BDT 1,154.65 million as on March 31, 2022 resulting a net decrease of BDT 681.86 million.

(Q2 Un-audited): As per life revenue account of the company for April to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 112.70 million as against excess of total expenses including claims over total income (deficit) of BDT 101.13 million in the corresponding previous period of 2022. Whereas as per life revenue account of the company for January to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 15.58 million as against excess of total expenses including claims over total income (deficit) of BDT 3.39 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund as on June 30, 2023 was BDT 457.13 million as against BDT 1,157.50 million as on June 30, 2022 resulting a net decrease of BDT 700.37 million.

NORTHRNINS

The Company has informed that the Board of Directors has elected Mr. Mortuza Siddique Chowdhury as the Chairman of the company.

SQURPHARMA

The company has informed that the Board of Directors in its meeting held on July 12, 2023 has approved an agreement with M/s Aristopharma Ltd. for contract manufacturing of some products on behalf of the company to meet increased demand of existing products and to introduce new products.

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