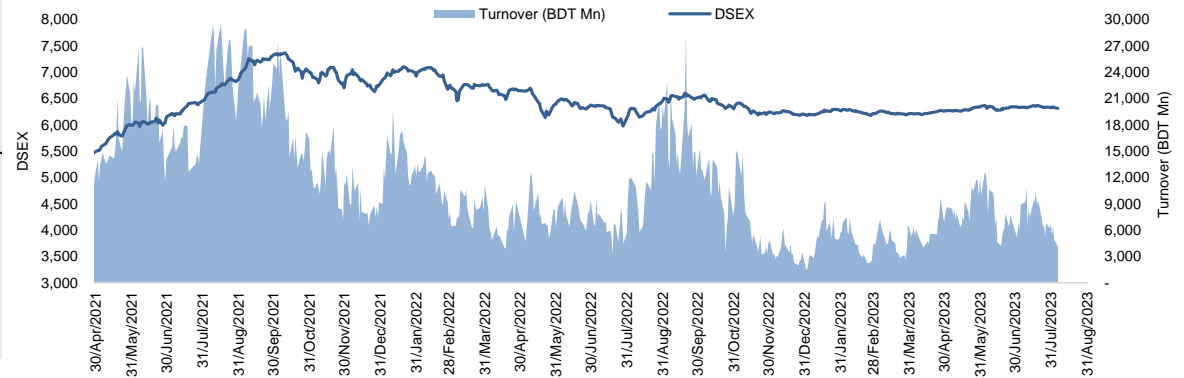


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.22%) lost 14.05 points and closed at 6,315.81. The blue-chip index DS30 (-0.40%), the Shariah-based index DSES (-0.34%), and the large-cap index CDSET (-0.08%) closed at 2,143.84, 1,368.23, and 1,208.93 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.25% followed by Pharmaceutical (-0.13%), Engineering (-0.11%), Fuel & Power (-0.09%), NBFi (-0.03%), Telecommunication (0.00%), and Bank (+0.00%), respectively. Block trades contributed 9.4% of the overall market turnover. Fu Wang Food Ltd. (-1.5%) was the most traded share with a turnover of BDT 143 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,315.81	6,329.86	-14.05	-0.22%	+1.8%
DS30	2,143.84	2,152.52	-8.69	-0.40%	-2.3%
DSES	1,368.23	1,372.93	-4.70	-0.34%	+0.7%
CDSET	1,208.93	1,209.88	-0.95	-0.08%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	39	134	160	333
A Category (Equity)	24	77	112	213
B Category (Equity)	10	48	37	95
N Category (Equity)	0	2	3	5
Z Category (Equity)	5	7	8	20
Mutual Funds	0	2	23	25
Corporate Bonds	0	0	2	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,761,923	7,813,705	-0.7%
	Mn USD	71,054	71,528	
Turnover	Mn BDT	4,176	4,857	-14.0%
	Mn USD	38	44	
Volume	Mn Shares	80	89	-10.5%
No. of Trade		108,262	124,677	-13.2%

* Average Interbank Exchange Rate is BDT 109.24 as of Aug 06, 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)

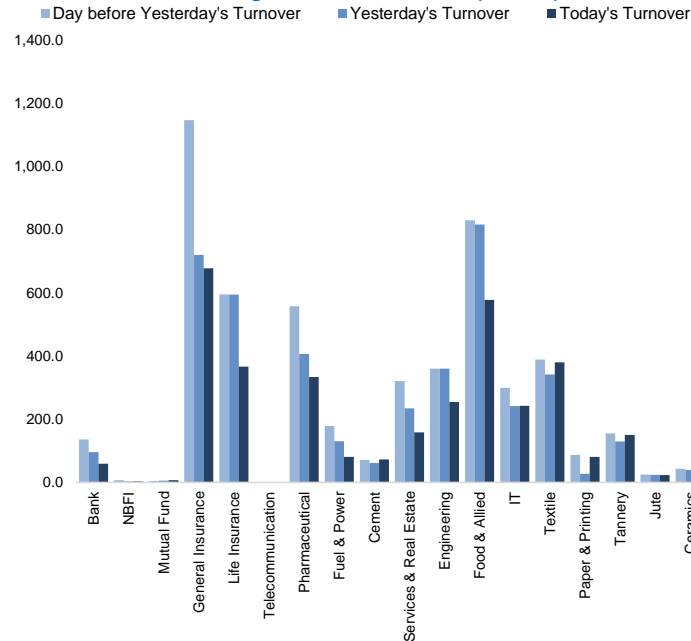
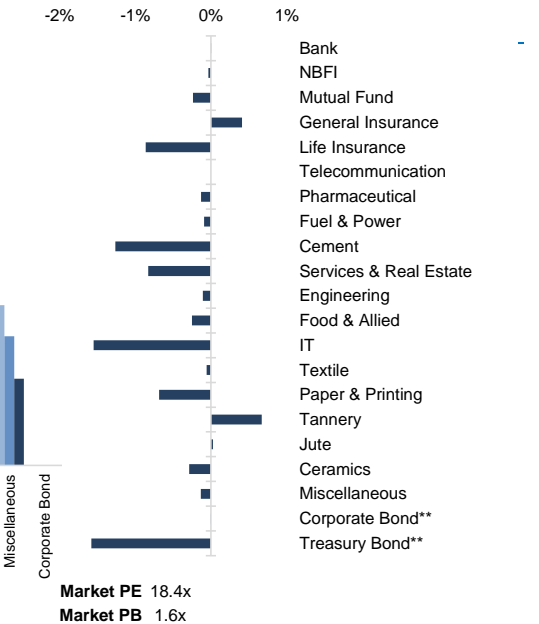


Figure: Sectorial Mcap Change



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	1,453	+0.02	+0.00%	35	684,764	9.3%	59.1	1.6%	12.1x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,921	1,922	-0.65	-0.03%	23	186,955	2.5%	3.4	0.1%	NM	4.6x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	829	831	-1.97	-0.24%	37	37,477	0.5%	7.1	0.2%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.4x	6.2x
General Insurance	3,627	3,613	+14.82	+0.41%	42	105,868	1.4%	677.4	17.9%	19.6x	1.7x	SQURPHARM	185,977	4.1%	15.1	9.9x	1.7x
Life Insurance	2,769	2,793	-24.04	-0.86%	15	77,387	1.1%	366.3	9.7%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.3	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,702	3,707	-4.79	-0.13%	34	718,158	9.8%	333.7	8.8%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,698	1,700	-1.55	-0.09%	23	447,987	6.1%	80.4	2.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.6	12.0x	1.2x
Cement	2,530	2,562	-32.33	-1.26%	7	121,496	1.7%	72.7	1.9%	26.8x	2.6x	BERGERPBL	84,185	1.9%	5.8	27.5x	6.0x
Services & Real Esta	1,937	1,953	-16.17	-0.83%	8	76,532	1.0%	158.6	4.2%	26.0x	1.0x	LHBL	78,277	1.7%	49.3	13.3x	3.9x
Engineering	4,507	4,512	-4.86	-0.11%	42	528,936	7.2%	254.4	6.7%	69.2x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,522	21,576	-53.88	-0.25%	21	398,233	5.4%	577.3	15.3%	20.0x	7.6x	BXPHERMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,160	3,209	-49.69	-1.55%	11	41,194	0.6%	242.2	6.4%	28.8x	3.0x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,646	1,647	-0.95	-0.06%	58	172,399	2.3%	379.5	10.0%	80.4x	1.2x	BEACONPHAR	56,595	1.2%	0.2	80.9x	9.2x
Paper & Printing	10,573	10,646	-72.91	-0.68%	6	40,737	0.6%	80.7	2.1%	39.3x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,256	3,234	+21.68	+0.67%	6	34,385	0.5%	150.5	4.0%	47.0x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,460	16,455	+4.54	+0.03%	3	4,027	0.1%	23.0	0.6%	NM	-1397.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	684	686	-1.96	-0.29%	5	31,625	0.4%	12.4	0.3%	52.5x	1.9x	UNILEVERCL	39,123	0.9%	1.2	45.2x	22.2x
Miscellaneous	4,206	4,212	-5.59	-0.13%	14	229,005	3.1%	273.9	7.2%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-0.00	-0.00%	10	36,590	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	89	-1.41	-1.58%	232	2,806,932	38.1%	31.5	0.8%	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
MEGHNA PET	40.8	+10.0%	20.1	NM	NM	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOC	33.9	-1.5%	142.7	NM	8.6x
AIL	93.6	+5.5%	121.8	58.5x	4.1x	BATBC	74,086	4.2%	15.4x	6.2x	JHRML	80.2	-4.1%	140.3	34.7x	2.6x
LIBRAINFU	861.9	+5.1%	28.0	NM	0.7x	BEXIMCO	69,196	4.0%	12.0x	1.2x	LEGACYFOOT	136.5	+2.7%	136.9	NM	15.3x
PEOPLESINS	41.1	+4.6%	72.2	16.1x	1.3x	RENATA	68,042	3.9%	38.0x	4.6x	KBPPWBIL	31.6	-2.8%	122.7	NM	2.7x
DAFODILCOM	68.9	+4.6%	12.6	97.0x	5.1x	BXPHERMA	45,564	2.6%	14.6x	1.5x	AIL	93.6	+5.5%	121.8	58.5x	4.1x
RELIANCINS	76.2	+3.1%	8.1	14.9x	1.2x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	METROSPIN	44.4	+0.2%	111.9	45.4x	2.1x
GREENDEL	80.0	+2.8%	77.3	12.6x	1x	GP	38,700	2.2%	11.9x	7.3x	SEAPEARL	213.6	-0.5%	100.3	31.0x	12.4x
RSRMSTEEL	18.3	+2.8%	4.3	NM	0.4x	BRACBANK	30,964	1.8%	8.3x	0.9x	EMERALDOIL	153.5	+1.7%	98.3	NM	NM
LEGACYFOOT	136.5	+2.7%	136.9	NM	15.3x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	SONALILIFE	92.3	+1.7%	96.4	NM	NM
BATASHOE	1,000.0	+2.0%	0.8	26.6x	3.5x	LHBL	28,936	1.7%	13.3x	3.9x	GEMINISEA	803.5	-1.1%	86.7	38.3x	31.7x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CAPMIBLMF	11.9	-9.8%	5.4	NM	1.3x	PUBALIBANK	18,880	1.1%	4.7x	0.6x	EMERALDOIL	166.1	135.9	9.0	540	82.37
PRAGATILIF	130.1	-6.4%	43.6	NM	NM	CITYBANK	18,235	1.0%	5.5x	0.7x	BEACONPHAR	266.0	223.8	3.0	184	41.27
AZIZPIPES	109.1	-4.7%	16.2	NM	NM	OLYMPIC	16,995	1.0%	17.3x	2.9x	AIL	85.6	85.0	6.0	479	40.78
JHRML	80.2	-4.1%	140.3	34.7x	2.6x	ROBI	15,714	0.9%	69.8x	2.5x	RDFOOD	56.7	55.0	3.0	705	39.93
GENEXIL	77.7	-3.6%	57.8	22.9x	4.1x	ALARABANK	14,417	0.8%	15.8x	1.1x	SEAPEARL	233.4	196.5	5.0	107	23.31
CVOPRL	169.2	-3.6%	36.2	NM	23.5x	BSRMLTD	14,210	0.8%	NM	0.7x	AL-HAJTEX	190.0	176.0	4.0	123	21.74
INTRACO	40.9	-3.5%	33.6	27.2x	3.2x	PRIMEBANK	13,629	0.8%	5.1x	0.7x	FORTUNE	75.1	74.1	2.0	281	20.94
RDFOOD	49.9	-3.5%	79.0	40.6x	3.1x	SEAPEARL	13,553	0.8%	31.0x	12.4x	SONALIPAPR	615.9	569.0	19.0	26	15.28
RUPALILIFE	117.2	-3.4%	73.1	NM	NM	UPGDCL	13,547	0.8%	16.7x	4.4x	KDSALTD	69.3	69.3	5.0	205	14.23
CENTRALPHL	11.7	-3.3%	11.9	NM	2.0x						LRBDL	35.1	31.6	17.0	398	13.05

* 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
EMERALDOIL	166.1	135.9	82.4	540	9
BEACONPHAR	266.0	223.8	41.3	184	3
AIL	85.6	85.0	40.8	479	6
RDFOOD	56.7	55.0	39.9	705	3
SEAPEARL	233.4	196.5	23.3	107	5
AL-HAJTEX	190.0	176.0	21.7	123	4
FORTUNE	75.1	74.1	20.9	281	2
SONALIPAPR	615.9	569.0	15.3	26	19
KDSALTD	69.3	69.3	14.2	205	5
LRBDL	35.1	31.6	13.1	398	17
GP	261.6	261.6	7.0	27	12
SUNLIFEINS	50.9	50.9	5.0	98	1
PEOPLESINS	40.6	40.6	4.1	100	2
CONFIDCEM	87.0	84.3	3.6	42	4
BATBC	480.0	479.8	3.5	7	3
BBS	21.4	19.5	3.4	160	2
BBSCABLES	49.9	49.9	3.3	66	1
UTTARABANK	20.5	20.4	3.1	150	4
SAIFPOWER	29.7	29.7	3.0	101	2
EGEN	40.7	40.7	2.8	70	1
AOL	33.0	32.9	2.5	77	4
PROVATIINS	53.1	53.1	2.4	44	4
Total			392.0		160

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ICBSONALI1		0.0%	3%	Record Date	24-Aug-23
PF1STMF		0.0%	3%	Record Date	24-Aug-23
ICBAGRANI1		0.0%	5%	Record Date	24-Aug-23
ICB3RDNRB		0.0%	3%	Record Date	24-Aug-23
ICBAMCL2ND		0.0%	3%	Record Date	24-Aug-23
ICBEPMF1S1		0.0%	3%	Record Date	24-Aug-23
IFILISLMF1		0.0%	3%	Record Date	24-Aug-23
PRIME1ICBA		0.0%	3%	Record Date	24-Aug-23
SANDHANINS		0.0%	12%	Record Date	27-Aug-23

Important DSE News

SONALILIFE

As per life revenue account of the company for April to June, 2023, excess of total income over total claims and expenses (surplus) was BDT 886.06 million as against excess of total income over total claims and expenses (surplus) of BDT 590.58 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 income over total claims and expenses (surplus) was BDT 1,557.83 million as against excess of total income over total claims and expenses (surplus) of BDT 1,029.88 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund as on June 30, 2023 was BDT 7,593.39 million as against BDT 4,000.18 million as on June 30, 2022 resulting a net increase of BDT 3,593.21 million.

PIONEERINS

The Company has informed that the Board of Directors has elected Mr. Syed Nasim Manzur, Director, as the Chairman of the company.

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