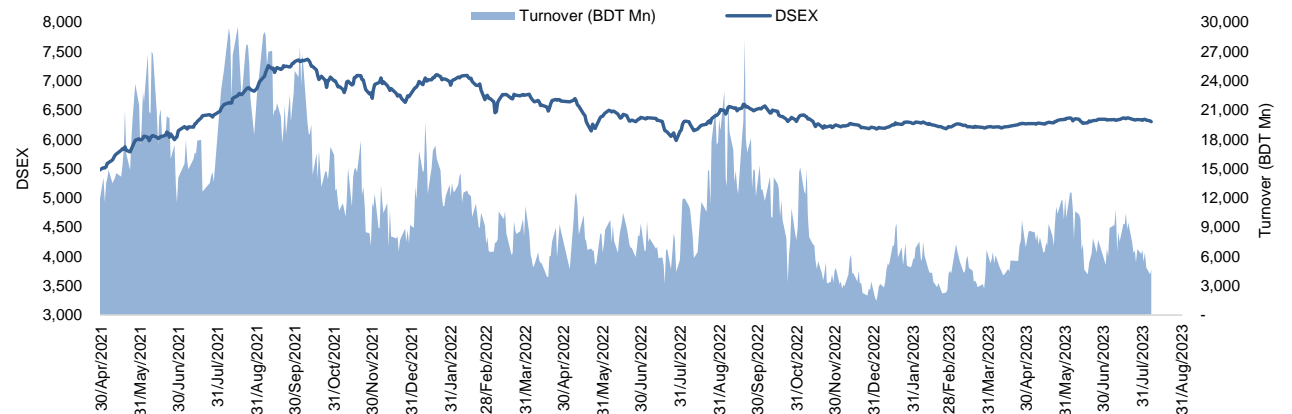


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.26%) lost 16.16 points and closed at 6,299.66. The blue-chip index DS30 (-0.25%), the Shariah-based index DSES (-0.14%), and the large-cap index CDSET (+0.03%) closed at 2,138.40, 1,366.27, and 1,209.31 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.10% followed by NBF1 (+0.01%), Bank (+0.01%). Food & Allied experienced the highest loss of 0.09% followed by Engineering (-0.06%), Fuel & Power (-0.01%). Block trades contributed 9.1% of the overall market turnover. Sonali Paper & Board Mills Ltd. (+2.1%) was the most traded share with a turnover of BDT 371 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,299.66	6,315.81	-16.16	-0.26%	+1.5%
DS30	2,138.40	2,143.84	-5.43	-0.25%	-2.6%
DSES	1,366.27	1,368.23	-1.96	-0.14%	+0.5%
CDSET	1,209.31	1,208.93	+0.38	+0.03%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	28	142	166	336
A Category (Equity)	19	83	113	215
B Category (Equity)	8	46	43	97
N Category (Equity)	0	3	2	5
Z Category (Equity)	1	10	8	19
Mutual Funds	0	2	23	25
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,754,545	7,761,923	-0.1%
	Mn USD	70,886	70,953	
Turnover	Mn BDT	4,685	4,176	+12.2%
	Mn USD	43	38	
Volume	Mn Shares	105	80	+30.7%
No. of Trade		107,269	108,262	-0.9%

* Average Interbank Exchange Rate is BDT 109.40 as of Aug 07, 2023

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Figure: Sectorial Turnover (BDT Mn)

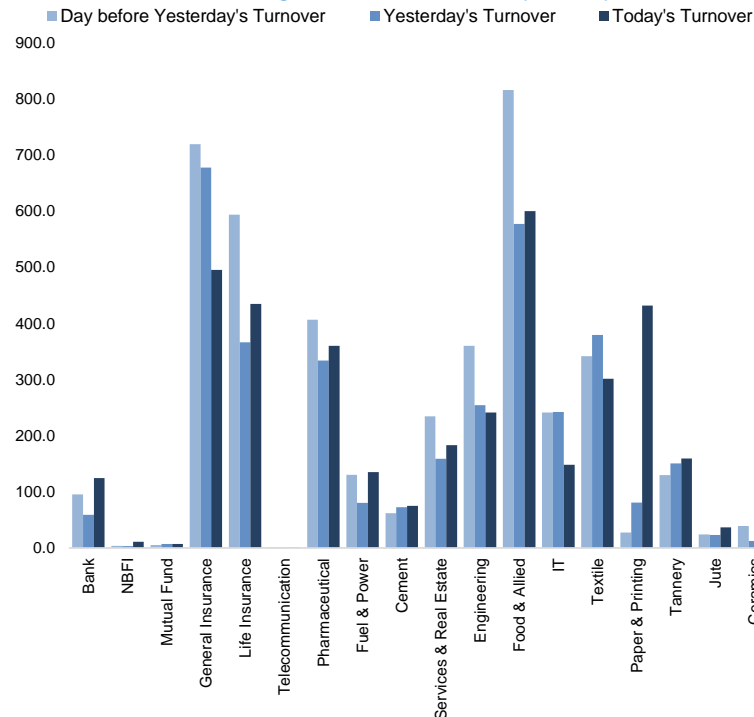
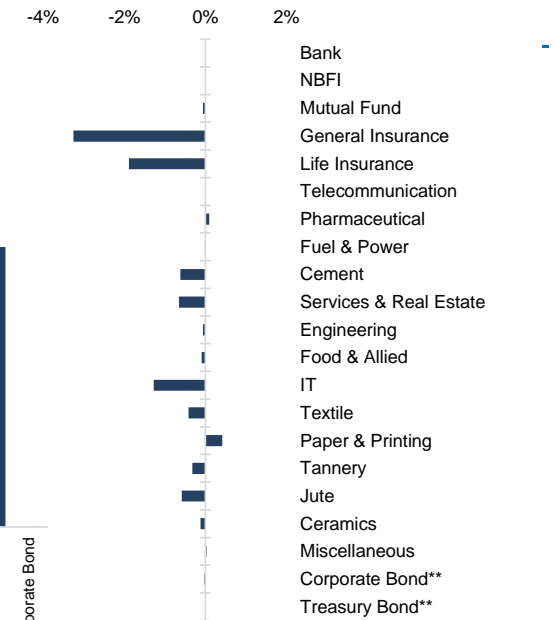


Figure: Sectorial Mcap Change



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	+0.10	+0.01%	35	684,813	9.3%	124.4	2.9%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,921	1,921	+0.24	+0.01%	23	186,978	2.5%	11.0	0.3%	NM	4.6x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	829	-0.49	-0.06%	37	37,455	0.5%	7.1	0.2%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.4x	6.2x
General Insurance	3,509	3,627	-118.04	-3.25%	42	102,423	1.4%	495.3	11.6%	19.0x	1.6x	SQURPHARMA	186,155	4.1%	86.7	9.9x	1.7x
Life Insurance	2,717	2,769	-52.16	-1.88%	15	75,929	1.0%	434.8	10.2%	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%	0.0	38.0x	4.6x
Pharmaceutical	3,706	3,702	+3.57	+0.10%	34	718,850	9.8%	360.0	8.5%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,698	1,698	-0.21	-0.01%	23	447,932	6.1%	134.8	3.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,514	2,530	-15.56	-0.61%	7	120,748	1.6%	74.9	1.8%	26.6x	2.6x	BERGERPBL	84,227	1.9%	11.1	27.5x	6.0x
Services & Real Estate	1,925	1,937	-12.52	-0.65%	8	76,038	1.0%	183.1	4.3%	25.9x	1.0x	LHBL	77,696	1.7%	48.5	13.2x	3.9x
Engineering	4,504	4,507	-2.55	-0.06%	42	528,637	7.2%	241.1	5.7%	69.2x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,501	21,522	-20.38	-0.09%	21	397,856	5.4%	599.9	14.1%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,119	3,160	-40.27	-1.27%	11	40,669	0.6%	148.3	3.5%	28.5x	2.9x	BRACBANK	57,596	1.3%	0.2	8.3x	0.9x
Textile	1,640	1,646	-6.81	-0.41%	58	171,687	2.3%	301.3	7.1%	80.0x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,617	10,573	+44.01	+0.42%	6	40,907	0.6%	431.8	10.1%	39.4x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,245	3,256	-10.50	-0.32%	6	34,274	0.5%	159.5	3.7%	46.9x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,364	16,460	-96.22	-0.58%	3	4,003	0.1%	36.4	0.9%	NM	-1389.6x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	683	684	-0.82	-0.12%	5	31,587	0.4%	14.4	0.3%	52.4x	1.9x	UNILEVERCL	39,281	0.9%	1.9	45.4x	22.3x
Miscellaneous	4,207	4,206	+1.30	+0.03%	14	229,076	3.1%	498.6	11.7%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-0.02	-0.03%	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	88	-	-	232	2,806,932	38.2%	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
KBPPWBIL	32.8	+3.8%	262.6	NM	2.8x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	SONALIPAPR	627.9	+2.1%	371.0	67.2x	3.7x
UNIONCAP	9.2	+3.4%	10.6	NM	NM	BATBC	74,086	4.2%	15.4x	6.2x	KBPPWBIL	32.8	+3.8%	262.6	NM	2.8x
PRIMEBANK	20.2	+3.1%	25.0	5.2x	0.7x	BEXIMCO	69,196	4.0%	12.0x	1.2x	FUWANGFOOD	34.5	+1.8%	187.1	NM	8.7x
PREMIERCEM	64.4	+2.5%	18.0	NM	1.0x	RENATA	68,042	3.9%	38.0x	4.6x	DELTALIFE	138.2	-3.6%	136.7	NM	NM
SINOBANGLA	77.4	+2.4%	94.6	42.3x	2.8x	BXPHARMA	45,564	2.6%	14.6x	1.5x	EMERALDOIL	149.3	-2.7%	124.3	NM	NM
AZIZPIPES	111.5	+2.2%	10.7	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RUPALILIFE	113.4	-3.2%	114.2	NM	NM
SONALIPAPR	627.9	+2.1%	371.0	67.2x	4x	GP	38,700	2.2%	11.9x	7.3x	SEAPEARL	213.1	-0.2%	114.1	30.9x	12.3x
FARCHEM	10.9	+1.9%	13.3	NM	0.9x	BRACBANK	30,964	1.8%	8.3x	0.9x	METROSPIN	40.7	-8.3%	106.9	41.6x	1.9x
FUWANGFOOD	34.5	+1.8%	187.1	NM	8.7x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	LEGACYFOOT	131.1	-4.0%	100.8	NM	14.7x
YPL	27.2	+1.5%	52.0	NM	5.1x	LHBL	28,936	1.7%	13.2x	3.9x	SINOBANGLA	77.4	+2.4%	94.6	42.3x	2.8x

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)
METROSPIN	40.7	-8.3%	106.9	41.6x	1.9x	PUBALIBANK	18,880	1.1%	4.6x	0.6x	NBL	8.2	8.0	2.0	20,061	160.50
REPUBLIC	36.4	-7.8%	10.9	18.3x	2x	CITYBANK	18,235	1.0%	5.5x	0.7x	SEAPEARL	232.2	197.0	4.0	205	42.25
CRYSTALINS	57.6	-6.8%	38.9	17.7x	2.3x	OLYMPIC	16,995	1.0%	17.3x	2.9x	SQURPHARMA	209.7	209.0	4.0	162	33.77
MEGCONMILK	30.5	-6.4%	2.1	20.6x	NM	ROBI	15,714	0.9%	69.8x	2.5x	BEXIMCO	111.0	110.0	4.0	285	31.50
GLOBALINS	32.9	-6.3%	9.6	23.8x	2.3x	ALARABANK	14,417	0.8%	15.8x	1.1x	GREENDELT	78.0	78.0	1.0	400	31.20
ASIAINS	49.3	-6.1%	54.2	23.5x	1.8x	BSRMLTD	14,210	0.8%	NM	0.7x	CNATEX	11.0	11.0	1.0	2,250	24.75
JANATAINS	40.1	-5.6%	38.9	28.5x	2.6x	PRIMEBANK	13,629	0.8%	5.2x	0.7x	GP	261.7	261.6	7.0	27	7.08
EIL	30.1	-5.6%	21.0	24.1x	1.6x	SEAPEARL	13,553	0.8%	30.9x	12.3x	BATBC	479.8	479.8	5.0	13	6.48
MERCINS	34.1	-5.5%	4.9	18.8x	1.6x	UPGDCL	13,547	0.8%	16.7x	4.4x	FINEFOODS	119.0	119.0	2.0	47	5.57
PEOPLESINS	38.9	-5.4%	42.0	15.3x	1.2x						ISLAMIINS	50.0	50.0	1.0	106	5.30

* 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
NBL	8.2	8.0	160.5	20,061	2
SEAPEARL	232.2	197.0	42.2	205	4
SQURPHARMA	209.7	209.0	33.8	162	4
BEXIMCO	111.0	110.0	31.5	285	4
GREENDELT	78.0	78.0	31.2	400	1
CNATEX	11.0	11.0	24.8	2,250	1
GP	261.7	261.6	7.1	27	7
BATBC	479.8	479.8	6.5	13	5
FINEFOODS	119.0	119.0	5.6	47	2
ISLAMINS	50.0	50.0	5.3	106	1
AIL	89.5	88.0	4.9	56	3
AL-HAJTEX	191.0	185.0	4.8	26	4
SONALIPAPR	655.0	569.0	4.1	7	4
LRBDL	35.1	31.6	4.0	121	5
SILVAPHL	21.6	19.5	3.9	182	2
SONALILIFE	92.0	92.0	3.7	40	1
BXPHARMA	136.0	131.6	3.6	26	5
ISLAMICFIN	19.7	19.7	3.3	170	1
LINDEBD	1,315.0	1,310.4	3.1	2	3
NFML	18.7	18.7	2.8	152	1
KDSALTD	75.0	69.3	2.8	38	2
EIL	34.8	32.5	2.8	85	2
Total			427.8		109

Important DSE News

SEMLIBLSF

The Trustee Committee of the Fund has declared 4.50% cash dividend based on the Net Income for the year ended June 30, 2023 and previous Retained Earnings. Record date: 28.08.2023. The Fund has reported EPU of Tk. 0.24, NAV per unit at market price of Tk. 10.47, NAV per unit at cost of Tk. 10.97 and NOCFPU of Tk. 0.33 for the year ended June 30, 2023 as against Tk. 0.52, Tk. 10.83, Tk. 11.25 and Tk. 0.47 respectively for the year ended June 30, 2022.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RUPALILIFE		0.0%	11.0%	Record Date	17-Aug-23
PADMALIFE		0.0%	0.0%	Record Date	20-Aug-23
SONALILIFE		0.0%	20.0%	Record Date	20-Aug-23
MEGHNALIFE		0.0%	20.0%	Record Date	20-Aug-23
CLICL		0.0%	2.0%	Record Date	24-Aug-23
SUNLIFEINS		0.0%	0.0%	Record Date	24-Aug-23
ICBSONALI1		0.0%	2.5%	Record Date	24-Aug-23
PF1STMF		0.0%	3.0%	Record Date	24-Aug-23
ICBAGRAN1		0.0%	5.0%	Record Date	24-Aug-23
ICB3RDNRB		0.0%	3.0%	Record Date	24-Aug-23
ICBAMCL2ND		0.0%	3.0%	Record Date	24-Aug-23
ICBEPMF1S1		0.0%	3.0%	Record Date	24-Aug-23
IFILISLMF1		0.0%	3.0%	Record Date	24-Aug-23
PRIME1ICBA		0.0%	3.0%	Record Date	24-Aug-23
SANDHANINS		0.0%	12.0%	Record Date	27-Aug-23
SEMLIBLSF		0.0%	4.5%	Record Date	28-Aug-23

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