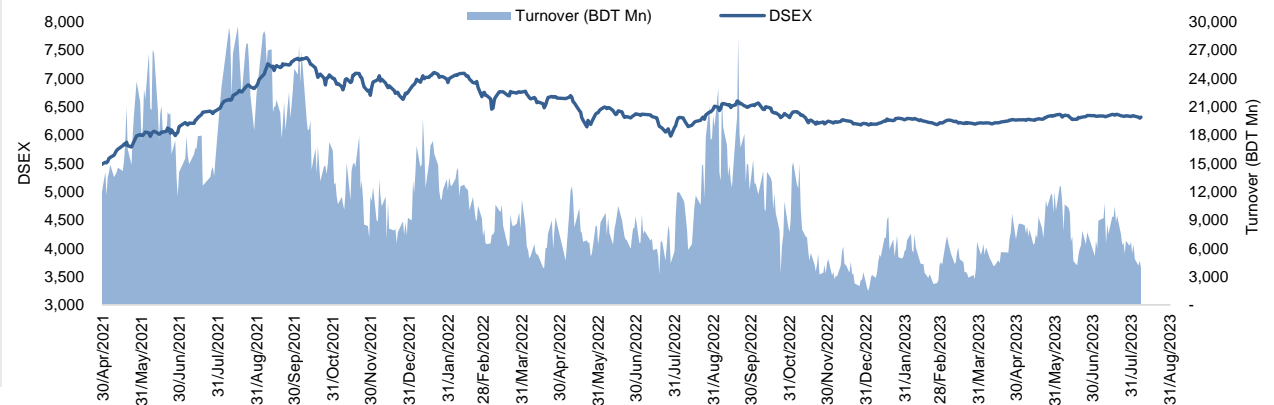


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.25%) gained 15.92 points and closed at 6,315.57. The blue-chip index DS30 (+0.49%), the Shariah-based index DSES (+0.35%), and the large-cap index CDSET (+0.25%) closed at 2,148.81, 1,371.10, and 1,212.33 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.28% followed by Pharmaceutical (+0.22%), Bank (+0.13%), Fuel & Power (+0.12%), Engineering (+0.05%), Telecommunication (0.00%), and NBFi (-0.01%), respectively. Block trades contributed 12.0% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+1.9%) was the most traded share with a turnover of BDT 248 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,315.57	6,299.66	+15.92	+0.25%	+1.8%
DS30	2,148.81	2,138.40	+10.41	+0.49%	-2.1%
DSES	1,371.10	1,366.27	+4.83	+0.35%	+0.9%
CDSET	1,212.33	1,209.31	+3.02	+0.25%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	110	52	175	337
A Category (Equity)	57	37	123	217
B Category (Equity)	40	13	42	95
N Category (Equity)	2	1	3	6
Z Category (Equity)	11	1	7	19
Mutual Funds	1	1	24	26
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,763,281	7,754,545	+0.1%
	Mn USD	70,898	70,818	
Turnover	Mn BDT	3,857	4,685	-17.7%
	Mn USD	35	43	
Volume	Mn Shares	79	105	-24.1%
No. of Trade		91,423	107,269	-14.8%

\* Average Interbank Exchange Rate is BDT 109.50 as of Aug 08, 2023

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Figure: Sectorial Turnover (BDT Mn)

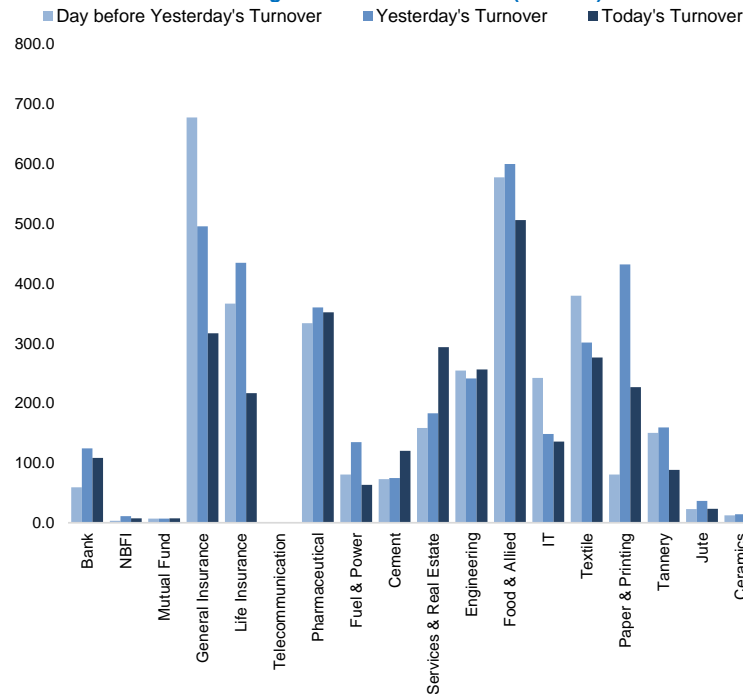
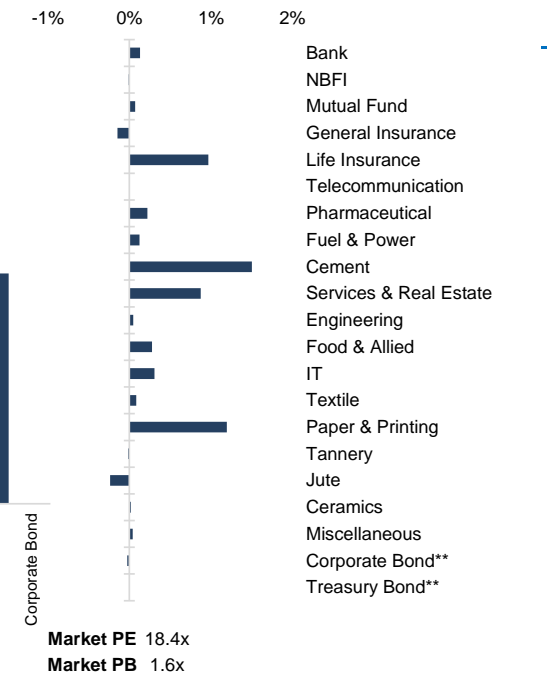


Figure: Sectorial Mcap Change



\* 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	1,455	1,453	+1.94	+0.13%	35	685,726	9.3%	108.5	3.2%	12.1x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,921	1,921	-0.15	-0.01%	23	186,963	2.5%	7.3	0.2%	NM	4.6x	WALTONHIL	317,378	7.0%	0.3	49.1x	3.2x
Mutual Fund	829	828	+0.61	+0.07%	37	37,483	0.5%	7.4	0.2%	NM	0.7x	BATBC	280,098	6.2%	0.5	15.4x	6.2x
General Insurance	3,504	3,509	-5.06	-0.14%	42	102,275	1.4%	316.7	9.3%	19.0x	1.6x	SQURPHARMA	187,041	4.1%	49.7	9.9x	1.7x
Life Insurance	2,743	2,717	+26.34	+0.97%	15	76,665	1.0%	216.9	6.4%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.5	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,714	3,706	+8.23	+0.22%	34	720,446	9.8%	351.8	10.4%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,700	1,698	+2.10	+0.12%	23	448,487	6.1%	63.4	1.9%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,552	2,514	+37.83	+1.50%	7	122,565	1.7%	120.5	3.5%	27.0x	2.7x	BERGERPBL	84,366	1.9%	6.4	27.6x	6.0x
Services & Real Esta	1,941	1,925	+16.86	+0.88%	8	76,704	1.0%	293.4	8.6%	26.1x	1.0x	LHBL	79,322	1.7%	78.6	13.5x	4.0x
Engineering	4,506	4,504	+2.15	+0.05%	42	528,890	7.2%	256.4	7.6%	69.2x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,561	21,501	+60.07	+0.28%	21	398,967	5.4%	506.1	14.9%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.1	14.6x	1.5x
IT	3,129	3,119	+9.58	+0.31%	11	40,794	0.6%	135.6	4.0%	28.5x	2.9x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,641	1,640	+1.39	+0.08%	58	171,833	2.3%	276.4	8.1%	80.1x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,744	10,617	+126.99	+1.20%	6	41,396	0.6%	226.5	6.7%	39.9x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,245	3,245	-0.46	-0.01%	6	34,269	0.5%	88.4	2.6%	46.9x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,325	16,364	-38.74	-0.24%	3	3,994	0.1%	23.1	0.7%	NM	-1386.3x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	683	683	+0.12	+0.02%	5	31,593	0.4%	10.3	0.3%	52.4x	1.9x	UNILEVERCL	39,514	0.9%	1.0	45.7x	22.5x
Miscellaneous	4,209	4,207	+1.70	+0.04%	14	229,169	3.1%	384.9	11.3%	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%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.01	+0.01%	232	2,807,187	38.1%	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
CENTRALPHL	12.3	+9.8%	24.2	NM	2.1x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	SEAPEARL	217.2	+1.9%	248.4	31.5x	12.6x
MEGHNAPET	42.7	+9.8%	10.6	NM	NM	BATBC	74,086	4.2%	15.4x	6.2x	KBPPWBIL	32.0	-2.4%	248.1	NM	2.7x
FARCHEM	11.9	+9.2%	57.9	NM	1.0x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SONALIPAPR	637.1	+1.5%	177.2	68.1x	3.7x
SHYAMPSUG	111.8	+6.4%	1.7	NM	NM	RENATA	68,042	3.9%	38.0x	4.6x	FUWANGFOOI	34.8	+0.9%	164.0	NM	8.8x
AMBEEPFA	566.2	+6.2%	21.7	NM	29.8x	BXPHARMA	45,564	2.6%	14.6x	1.5x	AIL	92.5	-0.3%	100.3	57.8x	4.1x
OAL	12.9	+4.9%	26.6	NM	1.1x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RDFOOD	51.6	+4.9%	94.9	42.0x	3.2x
RDFOOD	51.6	+4.9%	94.9	42.0x	3x	GP	38,700	2.2%	11.9x	7.3x	JHRML	81.7	+1.1%	85.5	35.3x	2.6x
MEGCONMILK	31.9	+4.6%	4.9	21.6x	NM	BRACBANK	30,964	1.8%	8.3x	0.9x	DESHBANDHU	31.2	-	83.8	89.1x	1.7x
CAPMIBLMF	12.1	+4.3%	5.1	NM	1.3x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	LHBL	68.3	+2.1%	78.6	13.5x	4.0x
DELTALIFE	143.4	+3.8%	46.3	NM	NM	LHBL	28,936	1.7%	13.5x	4.0x	RUPALILIFE	115.3	+1.7%	75.0	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%	17.5x	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%	5.3x	0.7x						
						SEAPEARL	13,553	0.8%	31.5x	12.6x						
						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
SONALIPAPR	631.0	590.1	86.4	139	9
SEAPPEARL	210.0	196.0	72.2	357	10
RUPALILIFE	123.0	119.8	63.9	530	9
AL-HAJTEX	200.0	177.0	32.2	176	7
RDFOOD	52.2	44.4	31.4	705	2
BEACONPHAR	266.3	266.3	30.8	116	1
EMERALDOIL	144.0	134.4	24.5	181	6
BSCCL	202.0	199.9	20.1	100	2
NBL	8.2	8.1	10.8	1,327	14
KBPPWBIL	33.5	33.5	7.0	210	1
UTTARABANK	21.8	21.4	5.9	273	8
ISLAMIINS	50.0	50.0	5.7	113	2
METROSPIN	44.0	44.0	4.4	100	1
LINDEBD	1,311.0	1,310.4	4.2	3	7
GP	261.7	261.6	4.2	16	4
BATBC	479.9	479.8	3.8	8	6
UNIONINS	60.0	59.0	3.6	62	2
ORIONPHARM	77.1	71.7	3.1	43	5
LRBDL	35.1	31.9	2.8	85	3
JAMUNABANK	20.2	19.8	2.8	140	5
MATINSPINN	70.0	70.0	2.8	40	1
ANWARGALV	210.0	194.7	2.6	13	4
<b>Total</b>			<b>463.0</b>		<b>166</b>

#### 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
SEMLIBLSF		0.0%	5%	Record Date	28-Aug-23

#### Important DSE News

##### CITYBANK

The company has informed that the Board of Directors of the Company has approved the proposal for being a member of a consortium of few banks and most likely a telecom company for a proposed Digital Bank and also becoming sponsor shareholder by way of investing maximum BDT 277,800,000.00 (11.12% of total paid-up capital of the proposed Digital Bank) for the proposed Digital Bank subject to regulatory approval.

##### METROSPIN

In line with the PSI published on 11.10.2021 regarding the BMRE project, the company has further informed that they have opened LC of 24,000 spindles for the import of latest automated capital machineries with modern technology (Blow Room, Carding, Simplex, Auto cone) to replace the similar numbers of old machineries/existing machineries' capacity of 24,000 spindles. After implementation of the BMRE, the total spindle capacity will be 35,520 spindles and the production capacity of the project will be increased by 110% from the existing production capacity. The project is designed to produce all types of yarn which includes value added Man-Made Fiber (MMF) yarn besides the cotton yarn.

##### SQURPHARMA

The company has informed that the Board of Directors in its meeting held on August 07, 2023 has approved an agreement with M/s Euro Pharma Ltd. for contract manufacturing of some products on behalf of the Company to meet increased demand of existing products and to introduce new products.

##### BRACBANK

Refer to their earlier news disseminated by DSE on 12.04.2023 regarding dividend declaration and increase of authorized capital, the company has further informed that Bangladesh Bank has approved the increase of authorize capital of the company from Tk. 2000.00 crore to Tk. 5000.00 crore.

##### ASIAPACINS

The Company has informed that the Board of Directors has approved the appointment of Mr. Md. Shariful Islam Chowdhury as the Chief Executive Officer (Current Charge) of the Company with effect from August 01, 2023.

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