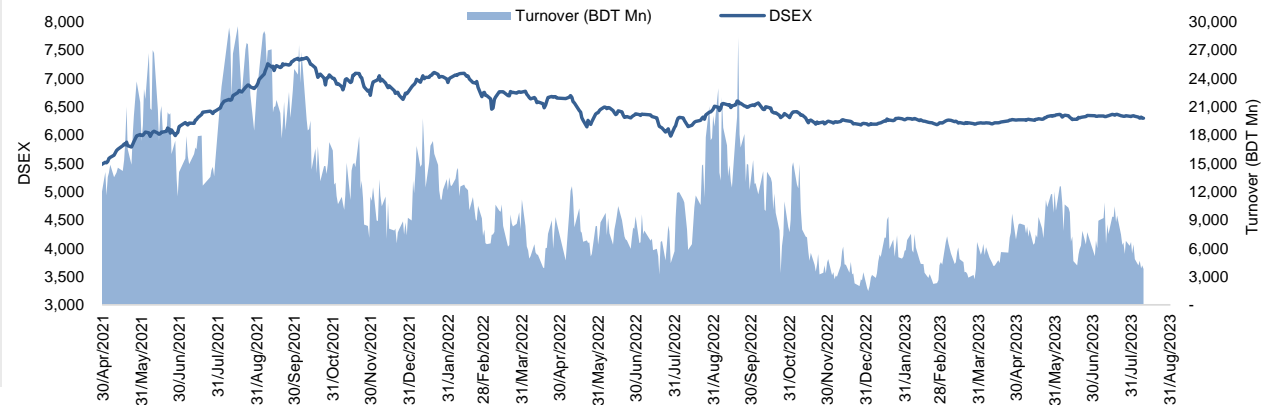


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.00%) gained 0.26 points and closed at 6,297.25. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (-0.07%), and the large-cap index CDSET (+0.00%) closed at 2,142.94, 1,368.05, and 1,211.73 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.20% followed by Pharmaceutical (+0.01%), Telecommunication (0.00%). Engineering experienced the highest loss of 0.09% followed by Bank (-0.08%), Fuel & Power (-0.02%), NBFi (-0.01%). Block trades contributed 4.9% of the overall market turnover. Fu Wang Food Ltd. (-1.3%) was the most traded share with a turnover of BDT 237 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,297.25	6,296.99	+0.26	+0.00%	+1.5%
DS30	2,142.94	2,142.78	+0.16	+0.01%	-2.4%
DSES	1,368.05	1,369.03	-0.98	-0.07%	+0.7%
CDSET	1,211.73	1,211.71	+0.02	+0.00%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	72	84	168	324
A Category (Equity)	53	39	114	206
B Category (Equity)	18	33	45	96
N Category (Equity)	0	3	2	5
Z Category (Equity)	1	9	7	17
Mutual Funds	1	1	21	23
Corporate Bonds	0	0	1	1
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,754,995	7,753,836	+0.0%
	Mn USD	70,822	70,811	
Turnover	Mn BDT	3,807	4,189	-9.1%
	Mn USD	35	38	
Volume	Mn Shares	79	87	-8.3%
No. of Trade		103,829	111,314	-6.7%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 10, 2023

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Figure: Sectorial Turnover (BDT Mn)

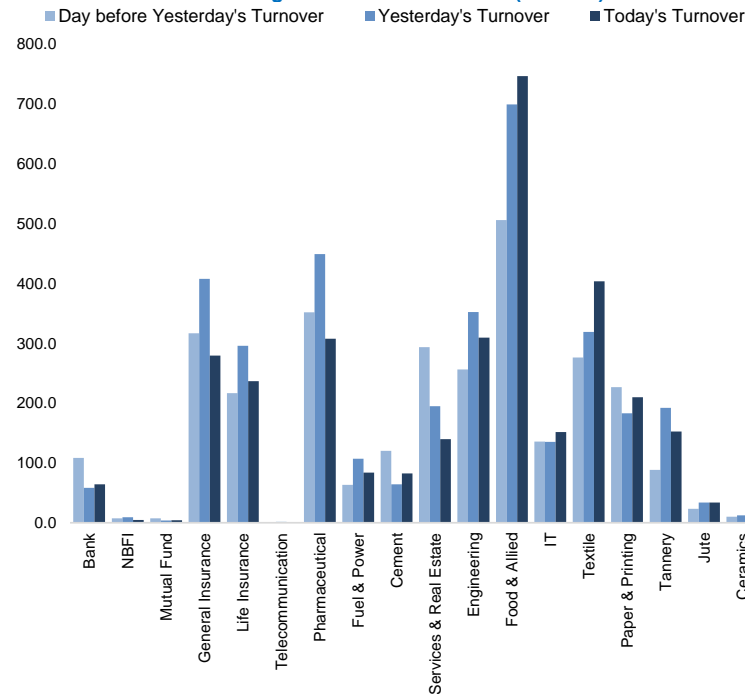
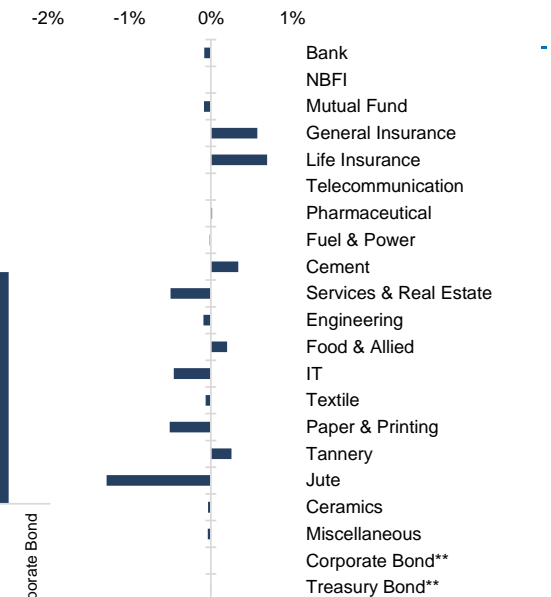


Figure: Sectorial Mcap Change



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	1,450	1,451	-1.16	-0.08%	35	683,606	9.3%	64.1	1.8%	12.1x	0.7x	GP	386,996	8.5%	0.4	11.9x	7.3x
NBFI	1,920	1,921	-0.15	-0.01%	23	186,883	2.5%	4.8	0.1%	NM	4.7x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	828	-0.69	-0.08%	37	37,427	0.5%	4.2	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.4x	6.2x
General Insurance	3,436	3,417	+19.44	+0.57%	42	100,297	1.4%	279.4	7.7%	18.6x	1.6x	SQURPHARMA	187,573	4.1%	28.7	9.9x	1.7x
Life Insurance	2,704	2,685	+18.54	+0.69%	15	75,575	1.0%	236.7	6.5%	NM	NM	ROBI	157,138	3.5%	0.2	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	1.1	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,715	3,714	+0.55	+0.01%	34	720,573	9.8%	307.8	8.5%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,702	-0.26	-0.02%	23	448,875	6.1%	83.7	2.3%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,547	2,539	+8.52	+0.34%	7	122,335	1.7%	82.4	2.3%	27.0x	2.6x	BERGERPBL	84,408	1.9%	7.1	27.6x	6.1x
Services & Real Esta	1,906	1,916	-9.47	-0.49%	8	75,306	1.0%	139.7	3.9%	25.6x	1.0x	LHBL	78,857	1.7%	31.0	13.4x	4.0x
Engineering	4,496	4,500	-4.02	-0.09%	42	527,675	7.2%	309.7	8.6%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,581	21,538	+42.85	+0.20%	21	399,322	5.4%	746.8	20.6%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,100	3,114	-14.16	-0.45%	11	40,419	0.5%	151.8	4.2%	28.3x	2.9x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,637	1,638	-1.03	-0.06%	58	171,397	2.3%	403.8	11.2%	79.9x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,535	10,588	-53.38	-0.50%	6	40,591	0.6%	209.8	5.8%	39.1x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,248	3,239	+8.16	+0.25%	6	34,300	0.5%	152.6	4.2%	46.9x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,413	16,625	-212.38	-1.28%	3	4,015	0.1%	33.7	0.9%	NM	-1393.8x	TITASGAS	40,459	0.9%	0.1	32.0x	0.6x
Ceramics	682	682	-0.23	-0.03%	5	31,553	0.4%	9.4	0.3%	52.3x	1.9x	UNILEVERCL	39,593	0.9%	4.3	45.8x	22.5x
Miscellaneous	4,200	4,201	-1.56	-0.04%	14	228,658	3.1%	387.4	10.7%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-0.00	-0.01%	10	36,585	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,807,221	38.2%	10.0	0.3%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ARAMIT	293.4	+8.7%	36.6	49.5x	2.1x
NTC	436.3	+7.9%	19.4	NM	216.0x
AMBEEPHA	645.1	+6.0%	39.7	NM	33.9x
EMERALDOIL	156.2	+5.7%	168.1	NM	NM
RUPALILIFE	115.1	+4.5%	104.1	NM	NM
PEOPLESINS	38.3	+3.8%	18.5	15.0x	1.2x
PREMIERCEM	67.5	+3.7%	41.9	NM	1x
POPULARLIF	71.5	+3.6%	6.0	NM	NM
ISLAMINS	50.7	+3.3%	6.7	16.3x	2.5x
IMAMBUTTON	130.1	+3.1%	16.0	NM	27.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DESHBANDHU	25.6	-8.9%	115.7	73.1x	1.4x
KBPPWBIL	28.9	-5.6%	205.5	NM	2x
JUTESPINN	380.5	-5.4%	0.9	NM	NM
MEGHNA PET	39.9	-5.0%	7.2	NM	NM
CAPMIBLMF	11.2	-4.3%	3.5	NM	1.2x
YPL	25.2	-3.8%	40.3	NM	4.7x
OIMEX	20.3	-3.8%	8.0	NM	1.8x
LIBRAINFU	824.3	-3.6%	12.7	NM	0.7x
NORTHERN	226.1	-2.9%	3.6	NM	2.8x
CNATEX	10.4	-2.8%	26.5	21.4x	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	9.9x	1.7x
BATBC	74,086	4.2%	15.4x	6.2x
BEXIMCO	69,196	4.0%	12.0x	1.2x
RENATA	68,042	3.9%	38.0x	4.6x
BXPHARMA	45,564	2.6%	14.6x	1.5x
BEACONPHAR	39,617	2.3%	80.9x	9.2x
GP	38,700	2.2%	11.9x	7.3x
BRACBANK	30,964	1.8%	8.3x	0.9x
ISLAMIBANK	30,494	1.7%	8.4x	0.7x
LHBL	28,936	1.7%	13.4x	4.0x
NBL	19,116	1.1%	NM	0.8x
PUBALIBANK	18,880	1.1%	4.6x	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%	5.2x	0.7x
SEAPEARL	13,553	0.8%	30.6x	12.2x
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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOI	31.4	-1.3%	236.8	NM	7.9x
AIL	95.9	+1.5%	230.9	59.9x	4.2x
KBPPWBIL	28.9	-5.6%	205.5	NM	2.4x
EMERALDOIL	156.2	+5.7%	168.1	NM	NM
SONALIPAPR	625.4	-0.0%	138.2	66.9x	3.7x
DESHBANDHU	25.6	-8.9%	115.7	73.1x	1.4x
RUPALILIFE	115.1	+4.5%	104.1	NM	NM
SEAPEARL	211.0	-0.2%	94.0	30.6x	12.2x
LEGACYFOOT	127.8	+2.1%	88.3	NM	14.3x
RDFOOD	52.6	+1.5%	86.7	42.8x	3.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
AIL	99.0	89.4	10.0	378	34.91
UCB	12.4	11.8	4.0	1,840	22.67
SEAPEARL	215.0	195.1	5.0	97	20.56
EMERALDOIL	147.0	145.0	8.0	106	15.51
KBPPWBIL	32.5	32.5	1.0	410	13.33
SONALIPAPR	670.5	578.8	8.0	19	11.35
AL-HAJTEX	195.0	178.0	9.0	61	11.00
CNATEX	10.6	10.6	1.0	900	9.54
GP	261.6	261.6	8.0	20	5.33
DESHBANDHU	29.8	29.5	2.0	140	4.14

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
AIL	99.0	89.4	34.9	378	10
UCB	12.4	11.8	22.7	1,840	4
SEAPPEARL	215.0	195.1	20.6	97	5
EMERALDOIL	147.0	145.0	15.5	106	8
KBPPWBIL	32.5	32.5	13.3	410	1
SONALIPAPR	670.5	578.8	11.3	19	8
AL-HAJTEX	195.0	178.0	11.0	61	9
CNATEX	10.6	10.6	9.5	900	1
GP	261.6	261.6	5.3	20	8
DESHBANDHU	29.8	29.5	4.1	140	2
ROBI	27.0	27.0	3.8	142	3
PTL	77.0	69.4	3.7	50	3
GEMINISEA	835.0	827.0	2.7	3	3
RUPALILIFE	109.0	100.1	2.5	25	2
BATBC	479.8	479.8	2.2	5	4
SONALIANSH	520.1	520.1	2.1	4	2
SALVOCHEM	61.8	61.8	1.5	25	1
MERCANBANK	12.5	12.3	1.5	121	3
KDSALTD	77.5	69.3	1.3	18	2
ISLAMIINS	54.0	52.9	1.3	24	2
LRBDL	32.0	32.0	1.2	36	2
GENEXIL	81.0	81.0	1.0	13	1
Total			187.8		109

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
PRIMEFIN		0.0%	0%	Record Date	29-Aug-23

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Important DSE News
NCCBANK

The company has informed that the Board of Directors of the Company has approved to participate in a proposed Digital Bank as a Sponsor Shareholder with Maximum 10.00% shares or any proportionate amount based on requirement in the Paid-up Capital to be established/formed through a consortium of 10 banks subject to necessary approval/license of Bangladesh Bank and related regulatory authority(ies).

PUBALIBANK

The company has informed that the Board of Directors of the Company has approved the proposal for joining a "Consortium" of 9 commercial banks who together will apply for a Digital Bank with the proposed name of "Digi10 Bank Plc.", and also to become a sponsor shareholder by way of investing BDT 13.90 crore out of the total initial paid-up capital of Tk. 125 crore (i.e. to hold 11.11% shares of the proposed Digital Bank) subject to receiving all regulatory approvals.

PRIMELIFE

The company has informed that the Board has decided to sell land along with building of the Company measuring area 36.12 decimals at 112, Kazi Nazrul Islam Avenue, Banglamotor, Mauza-Bag Noadda, Police Station-Ramna, District-Dhaka to settle Policyholders claims payments. The company has also informed that the said decision of the property has been pre-approved by Insurance Development and Regulatory Authority (IDRA).

RAKCERAMIC

The company has informed that out of four (4) production lines in Tiles Plant of the company, the machineries of tiles Production Line-1 will remain under maintenance and modification from August 09, 2023 for 03 months (approximately). During the maintenance period, the other three production lines in Tiles Plant (Production Line-2, Production Line-3 and Production Line-4) will continue its production.

EBL

The company has informed that the Board of Directors of the Company has approved the proposal for joining a 'Consortium' comprises with other commercial banks for becoming a sponsor shareholder of the proposed Digital Bank in the name & style 'Digi10 Bank PLC' by investing an amount of Tk.12,50,00,000.00 (Taka twelve crore and fifty lac only) subject to all regulatory approvals.

ISLAMIBANK

The company vide its shareholding report of Sponsors and/or Directors for the month of July, 2023 has informed that Arabsas Travel & Tourist Agency, K.S.A. withdrew the Directorship of Mr. Musaid Abdullah A. Al-Rajhi, K.S.A. as their representative from the Board of Directors of the company and the same was approved by the Board of Directors of the company. However, Arabsas Travel & Tourist Agency, K.S.A. is still holding the same share. The company has also informed that Mr. Abu Sayeed Mohammad Quasem, nominated by Armada Spinning Mills Limited was appointed as Shareholder Director in place of Professor Md. Nazmul Hassan, Ph.D subject to approval of the concerned authorities whereas Bangladesh Bank already accorded its consent. The company has further informed that Mr. Showkat Hossain, FCA, nominated by Kingsway Endeavors Limited was appointed as Shareholder Director subject to approval of the concerned authorities whereas Bangladesh Bank already accorded its consent. The company also informed that Mr. Jamal Mostafa Chowdhury, nominated by Uniglobe Business Resources Limited was appointed as Shareholder Director subject to approval of the concerned authorities whereas Bangladesh Bank already accorded its consent. As a result, the shareholding of Sponsors and/or Directors as per shareholding report as on July 31, 2023 has increased from 41.9010% to 42.9826% (an increase of 1.0816%) from that of the previous month.

MTB

The company has informed that the Board of Directors of the Company has approved the proposal for application to Bangladesh Bank to obtain license for 'Digital Bank' through participating in consortium and investing initial minimum paid up capital as per the guidelines issued by Bangladesh Bank in this regard.

MERCANBANK

The company has informed that the Board of Directors has approved the proposal for joining a "Consortium" of 10 commercial banks who together will apply for a Digital Bank with the proposed name of "Digi10 Bank Plc.", and also to become a sponsor by way of Investing BDT 12.50 crores out of the total initial paid-up capital of Tk. 125.00 crore, (i.e., to hold 10% shares of the proposed Digital Bank) subject to approval of the regulatory authorities.

IMAMBUTTON

The company has informed that the Board of Directors of the company has decided to run a lease on existing agro project at Mohishdanga, Amtoli, Borguna with a land area of 8 bighas. The Board of Directors will invest Tk. 1 (One) crore as working capital.

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