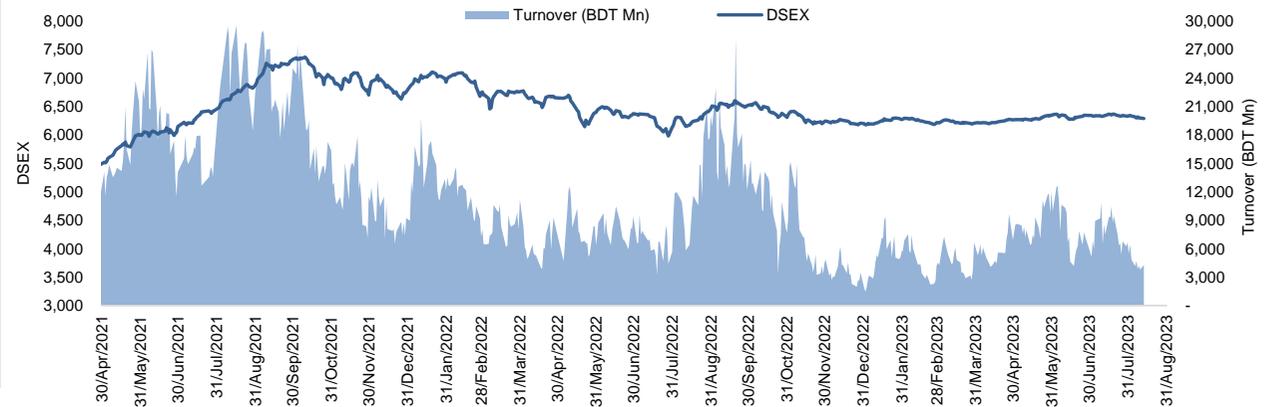


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.15%) lost 9.44 points and closed at 6,287.81. The blue-chip index DS30 (-0.20%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.09%) closed at 2,138.61, 1,364.10, and 1,210.59 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.23% followed by Pharmaceutical (-0.22%), Engineering (-0.18%), Bank (-0.06%), NBFi (-0.04%), Fuel & Power (-0.02%), and Telecommunication (0.00%), respectively. Block trades contributed 8.6% of the overall market turnover. Fu Wang Food Ltd. (-9.9%) was the most traded share with a turnover of BDT 211 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,287.81	6,297.25	-9.44	-0.15%	+1.3%
DS30	2,138.61	2,142.94	-4.33	-0.20%	-2.6%
DSES	1,364.10	1,368.05	-3.95	-0.29%	+0.4%
CDSET	1,210.59	1,211.73	-1.14	-0.09%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	75	89	171	335
A Category (Equity)	61	36	117	214
B Category (Equity)	12	43	41	96
N Category (Equity)	1	2	2	5
Z Category (Equity)	1	8	11	20
Mutual Funds	1	0	19	20
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,750,166	7,754,995	-0.1%
	Mn USD	70,778	70,822	
Turnover	Mn BDT	4,255	3,807	+11.8%
	Mn USD	39	35	
Volume	Mn Shares	84	79	+5.3%
	No. of Trade	121,126	103,829	+16.7%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 13, 2023

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Figure: Sectorial Turnover (BDT Mn)

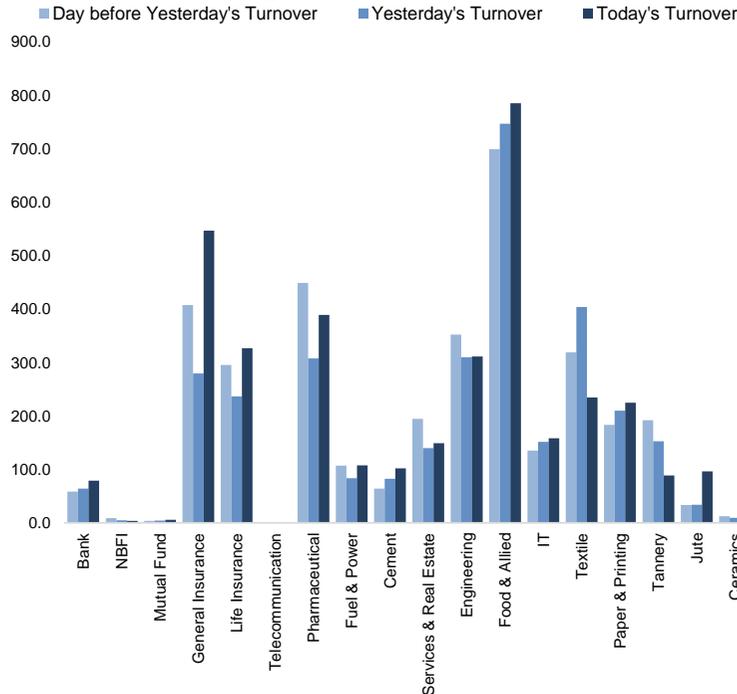
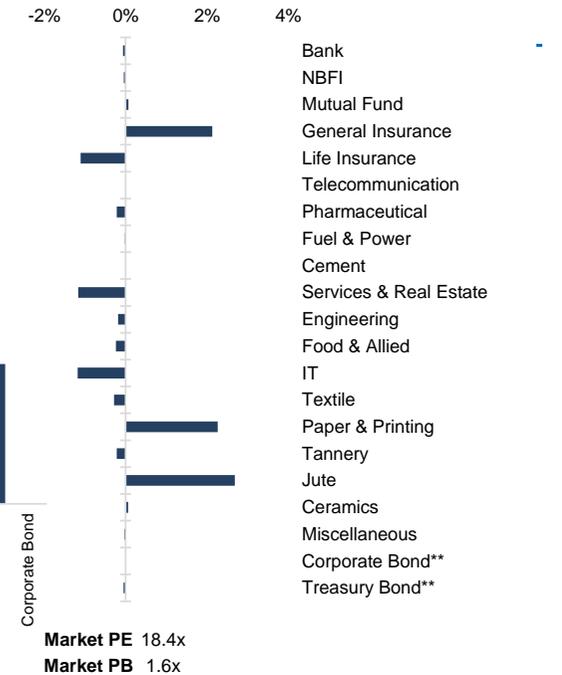


Figure: Sectorial Mcap Change



* 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	1,449	1,450	-0.89	-0.06%	35	683,187	9.3%	78.9	2.0%	12.1x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,920	1,920	-0.83	-0.04%	23	186,802	2.5%	4.0	0.1%	NM	4.7x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	828	+0.59	+0.07%	37	37,453	0.5%	6.0	0.2%	NM	0.7x	BATBC	280,098	6.2%	1.6	15.4x	6.2x
General Insurance	3,510	3,436	+73.17	+2.13%	42	102,432	1.4%	546.9	14.1%	19.0x	1.6x	SQURPHARMA	186,598	4.1%	25.7	9.9x	1.7x
Life Insurance	2,674	2,704	-29.83	-1.10%	15	74,741	1.0%	326.8	8.4%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.4	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,707	3,715	-7.99	-0.22%	34	719,023	9.8%	389.0	10.0%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,701	1,702	-0.27	-0.02%	23	448,802	6.1%	107.7	2.8%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,547	2,547	+0.25	+0.01%	7	122,347	1.7%	101.8	2.6%	27.0x	2.7x	BERGERPBL	84,862	1.9%	15.2	27.7x	6.1x
Services & Real Esta	1,884	1,906	-22.13	-1.16%	8	74,431	1.0%	148.9	3.8%	25.3x	1.0x	LHBL	78,741	1.7%	31.3	13.4x	4.0x
Engineering	4,488	4,496	-8.16	-0.18%	42	526,718	7.2%	311.3	8.0%	68.9x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,530	21,581	-50.70	-0.23%	21	398,384	5.4%	785.4	20.2%	20.0x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,064	3,100	-36.59	-1.18%	11	39,942	0.5%	158.4	4.1%	28.0x	2.9x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,632	1,637	-4.68	-0.29%	58	170,907	2.3%	234.3	6.0%	79.7x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,774	10,535	+238.84	+2.27%	6	41,511	0.6%	225.0	5.8%	40.0x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,241	3,248	-7.05	-0.22%	6	34,225	0.5%	88.7	2.3%	46.8x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,854	16,413	+440.88	+2.69%	3	4,123	0.1%	96.1	2.5%	NM	-1431.3x	TITASANGS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	683	682	+0.41	+0.06%	5	31,572	0.4%	17.7	0.5%	52.4x	1.9x	UNILEVERCL	39,800	0.9%	10.6	46.0x	22.6x
Miscellaneous	4,198	4,200	-1.31	-0.03%	14	228,586	3.1%	261.6	6.7%	16.1x	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	-0.04	-0.05%	232	2,805,878	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
CONTININS	45.9	+9.5%	82.0	76.5x	2.1x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOD	28.3	-9.9%	210.9	NM	7.1x
ASIAPACINS	57.0	+8.4%	16.4	23.8x	2.5x	BATBC	74,086	4.2%	15.4x	6.2x	RUPALILIFE	113.7	-1.2%	168.0	NM	NM
ARAMIT	317.9	+8.4%	39.0	53.6x	2.2x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SONALIPAPR	657.8	+5.2%	167.7	70.4x	3.8x
AMBEEPHA	693.4	+7.5%	29.2	NM	36.5x	RENATA	68,042	3.9%	38.0x	4.6x	RDFOOD	52.4	-0.4%	131.4	42.6x	3.3x
DGIC	32.8	+5.8%	27.8	36.0x	2.7x	BXPHARMA	45,564	2.6%	14.6x	1.5x	GEMINISEA	777.2	-4.1%	122.8	37.1x	30.6x
CRYSTALINS	58.9	+5.7%	59.3	18.1x	2.4x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	EMERALDOIL	149.5	-4.3%	114.3	NM	NM
GREENDELTA	75.5	+5.4%	23.0	11.9x	1x	GP	38,700	2.2%	11.9x	7.3x	SEAPEARL	204.4	-3.1%	101.4	29.6x	11.8x
NITOLINS	39.0	+5.4%	8.5	19.9x	1.3x	BRACBANK	30,964	1.8%	8.3x	0.9x	KBPPWBIL	26.2	-9.3%	101.2	NM	2.2x
SONALIPAPR	657.8	+5.2%	167.7	70.4x	3.8x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	SONALIANSH	550.8	+3.6%	91.5	NM	4.8x
DHAKAINS	56.0	+3.9%	6.9	17.7x	1.6x	LHBL	28,936	1.7%	13.4x	4.0x	CONTININS	45.9	+9.5%	82.0	76.5x	2.1x

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)
FUWANGFOOD	28.3	-9.9%	210.9	NM	7.1x	PUBALIBANK	18,880	1.1%	4.7x	0.6x	BRACBANK	32.3	32.3	13.0	3,020	97.55
DESHBANDHU	23.1	-9.8%	63.0	66.0x	1x	CITYBANK	18,235	1.0%	5.5x	0.7x	RENATA	1,155.0	1,141.8	4.0	51	57.97
KBPPWBIL	26.2	-9.3%	101.2	NM	2.2x	OLYMPIC	16,995	1.0%	17.4x	2.9x	EMERALDOIL	171.8	171.8	3.0	242	41.54
YPL	22.9	-9.1%	39.4	NM	4.3x	ROBI	15,714	0.9%	69.8x	2.5x	RUPALILIFE	120.0	115.0	4.0	168	19.34
OAL	11.1	-9.0%	25.3	NM	0.9x	ALARABANK	14,417	0.8%	15.8x	1.1x	GP	261.7	261.6	17.0	70	18.28
KPPL	10.1	-9.0%	7.8	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	MERCANBANK	13.3	12.5	4.0	1,120	14.80
WMSHIPYARD	11.5	-8.7%	34.5	NM	0.5x	PRIMEBANK	13,629	0.8%	5.2x	0.7x	SEAPEARL	229.4	192.6	7.0	66	14.32
METROSPIN	36.9	-7.3%	52.8	37.7x	1.8x	SEAPEARL	13,553	0.8%	29.6x	11.8x	AIL	99.3	89.2	11.0	141	12.81
FARCHEM	10.9	-6.8%	34.2	NM	0.9x	UPGDCL	13,547	0.8%	16.7x	4.4x	SONALIPAPR	615.1	615.1	1.0	11	6.77
BEACHHATCH	43.5	-6.2%	29.1	41.8x	4.1x						FUWANGFOOD	32.0	28.3	3.0	230	6.61

* 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
BRACBANK	32.3	32.3	97.5	3,020	13
RENATA	1,155.0	1,141.8	58.0	51	4
EMERALDOIL	171.8	171.8	41.5	242	3
RUPALILIFE	120.0	115.0	19.3	168	4
GP	261.7	261.6	18.3	70	17
MERCANBANK	13.3	12.5	14.8	1,120	4
SEAPEARL	229.4	192.6	14.3	66	7
AIL	99.3	89.2	12.8	141	11
SONALIPAPR	615.1	615.1	6.8	11	1
FUWANGFOOD	32.0	28.3	6.6	230	3
PREMIERCEM	68.0	66.6	5.7	84	2
ROBI	27.0	27.0	4.7	174	2
METROSPIN	43.0	43.0	4.5	104	1
BATBC	479.8	479.8	4.2	9	5
ACI	255.0	238.1	3.4	14	4
NAVANAPHAR	107.0	107.0	2.8	26	1
NBL	8.1	8.1	2.7	333	4
KDSALTD	77.0	76.0	2.4	32	3
SUMITPOWER	30.6	30.6	2.4	79	4
FINEFOODS	120.0	120.0	2.4	20	1
RDFOOD	53.5	53.0	2.4	45	2
JHRML	88.2	88.2	2.1	24	1
Total			366.1		148

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

Important DSE News
CAPMBDBLMF

The Trustee Board of the Fund has declared 6% cash dividend Based on the Distributable Income and Retained Earnings for the year ended June 30, 2023. Record date: 07.09.2023. The Fund has reported EPU of Tk. 0.53, NAV per unit at market price of Tk. 11.54, NAV per unit at cost of Tk. 10.96 and NOCFPU of Tk. 0.55 for the year ended June 30, 2023 as against Tk. 0.73, Tk. 12.71, Tk. 11.23 and Tk. 0.67 respectively for the year ended June 30, 2022.

POPULARLIF

The Board of Directors has recommended 38% cash dividend for the year ended December 31, 2022. Date of AGM: 26.09.2023, Time: 12:00 PM, Venue: Digital Platform. Record Date: 04.09.2023. The Company has also reported EPS of Tk. 3.80, NAV per share of Tk. 92.68 and NOCFPS of Tk. (39.21) for the year ended December 31, 2022 as against Tk. 3.80, Tk. 109.15 and Tk. (17.83) respectively for the year ended December 31, 2021.

(Q1 Un-audited): As per consolidated life revenue account of the company for January to March, 2023, excess of total expenses including claims over total income (deficit) was BDT 91.09 million as against excess of total expenses including claims over total income (deficit) of BDT 961.89 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT 16,768.18 million as on March 31, 2023 as against BDT 17,328.65 million as on March 31, 2022 resulting a net decrease of BDT 560.47 million.

(Q2 Un-audited): As per consolidated life revenue account of the company for April to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 992.65 million as against excess of total expenses including claims over total income (deficit) of BDT 1,369.58 million in the corresponding previous period of 2022. Whereas as per consolidated life revenue account of the company for January to June, 2023, excess of total expenses including claims over total income was BDT 1,083.74 million as against excess of total expenses including claims over total income (deficit) of BDT 2,358.19 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT 15,865.28 million as on June 30, 2023 as against BDT 15,601.86 million as on June 30, 2022 resulting a net increase of BDT 263.42 million.

CAPMIBBLMF

The Trustee Board of the Fund has declared 6% cash dividend based on Distributable Income and Retained Earnings for the year ended June 30, 2023. Record date: 07.09.2023. The Fund has also reported EPU of Tk. 0.53, NAV per unit at market price of Tk. 11.43, NAV per unit at cost of Tk. 10.84 and NOCFPU of Tk. 0.53 for the year ended June 30, 2023 as against Tk. 0.84, Tk. 12.39, Tk. 11.11 and Tk. 0.81 respectively for the year ended June 30, 2022.

MEGHNALIFE

(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 984.31 million as against excess of total expenses including claims over total income (deficit) of BDT 1,118.66 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT 16,935.18 as on March 31, 2023 million as against BDT 17,560.56 million as on March 31, 2022 resulting a net decrease of BDT 625.38 million. NOCFPS was BDT (10.18) for January-March 2023.

(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 740.49 million as against excess of total expenses including claims over total income (deficit) of BDT 516.40 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 1,724.80 million as against excess of total expenses including claims over total income (deficit) of BDT 1,635.06 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT 17,179.00 million as on June 30, 2023 as against BDT 18,162.82 million as on June 30, 2022 resulting a net decrease of BDT 983.82 million. NOCFPS was BDT (37.08) for January-June 2023.

BEACONPHAR

The company has informed that the Board of Directors has appointed Mr. Ulfat Karim as the Director and Chief Operating Officer (COO) of the company.

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UNIQUEHRL

The company has informed that the Board of Directors of the company has decided in principle to enter into a shareholder's agreement and subscribe 10% shares as sponsor shareholder in a proposed Digital Bank named "AMAR Digi Bank PLC" subject to the concerned regulatory approval. The company has also informed that the proposed digital bank's authorized share capital is BDT 250.00 crore and paid-up share capital is BDT 125.00 crore where the company will invest an amount of BDT 12.50 crore (Twelve crore fifty lac) divided into 1,25,00,000 nos. of ordinary shares of TK 10 (Ten) each along with other sponsors.

GENEXIL

The company has informed that the Board of Directors of the company has decided and reconstructed the Board and the management of the company as follows: Mr. Chowdhury Fazle Imam has resigned from the position of Chairman; Mr. Mohammed Adnan Imam has resigned from the position of Managing Director and appointed as the Chairman of the Board of Directors of the company; Mr. Prince Mojumder has resigned from the position of Chief Executive Officer and appointed as the Vice Chairman of the company and Mr. Shahjalal Uddin has been appointed as the Acting Managing Director & Chief Executive Officer of the company. All of the above changes are effective from August 09, 2023.

HWAWELLTEX

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Hwa Well Textiles (BD) PLC.' instead of 'Hwa Well Textiles (BD) Limited' with effect from August 14, 2023. Other things (except name) will remain unchanged.

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