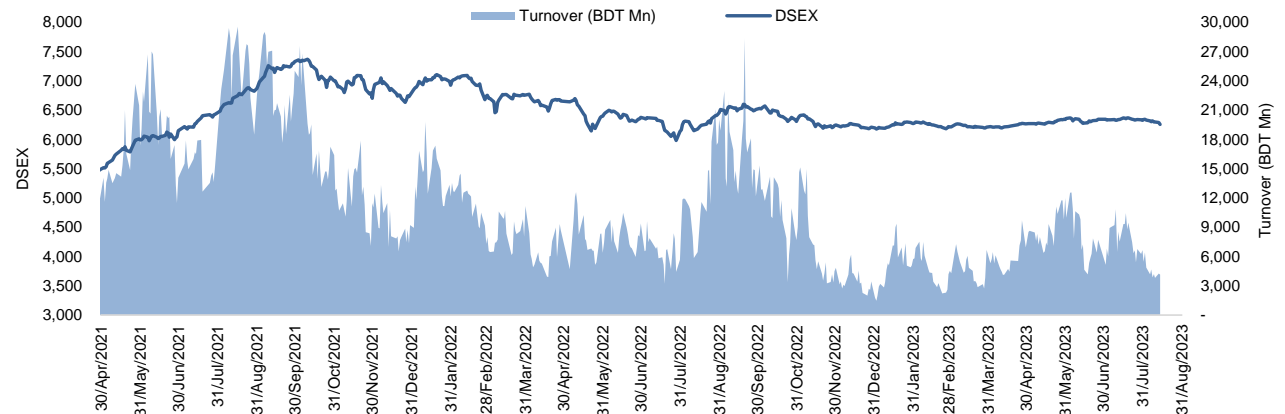


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.49%) lost 30.67 points and closed at 6,257.14. The blue-chip index DS30 (-0.65%), the Shariah-based index DSES (-0.45%), and the large-cap index CDSET (-0.16%) closed at 2,124.62, 1,357.95, and 1,208.71 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.38% followed by Pharmaceutical (-0.15%), Bank (-0.11%), Engineering (-0.11%), Fuel & Power (-0.11%), NBF (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 10.8% of the overall market turnover. Fu Wang Food Ltd. (-8.5%) was the most traded share with a turnover of BDT 237 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,257.14	6,287.81	-30.67	-0.49%	+0.8%
DS30	2,124.62	2,138.61	-13.99	-0.65%	-3.2%
DSES	1,357.95	1,364.10	-6.15	-0.45%	-0.1%
CDSET	1,208.71	1,210.59	-1.88	-0.16%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	19	148	223	390
A Category (Equity)	13	87	153	253
B Category (Equity)	5	49	54	108
N Category (Equity)	0	3	1	4
Z Category (Equity)	1	9	15	25
Mutual Funds	1	2	33	36
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,733,590	7,750,166	-0.2%
	Mn USD	70,626	70,778	
Turnover	Mn BDT	4,138	4,255	-2.8%
	Mn USD	38	39	
Volume	Mn Shares	86	84	+3.1%
No. of Trade		114,269	121,126	-5.7%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 14, 2023

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Figure: Sectorial Turnover (BDT Mn)

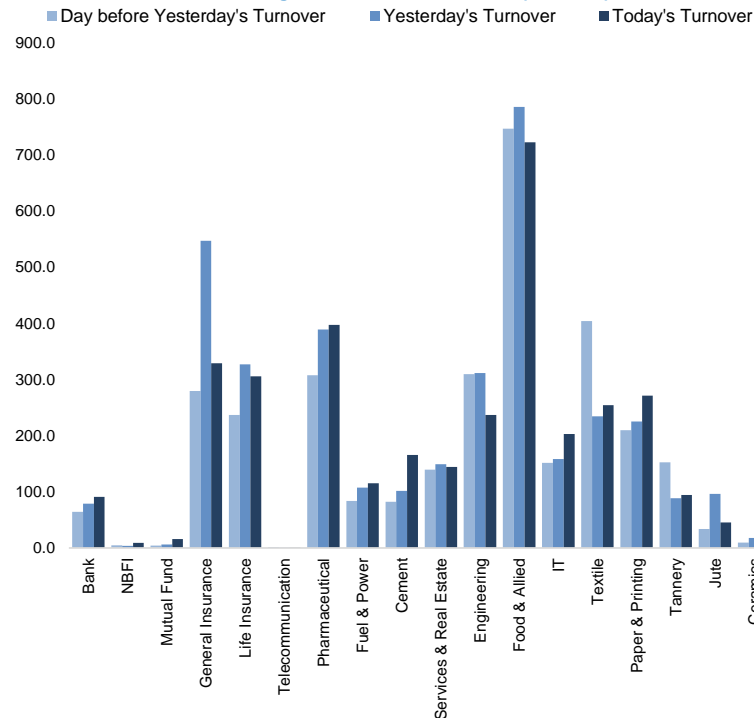
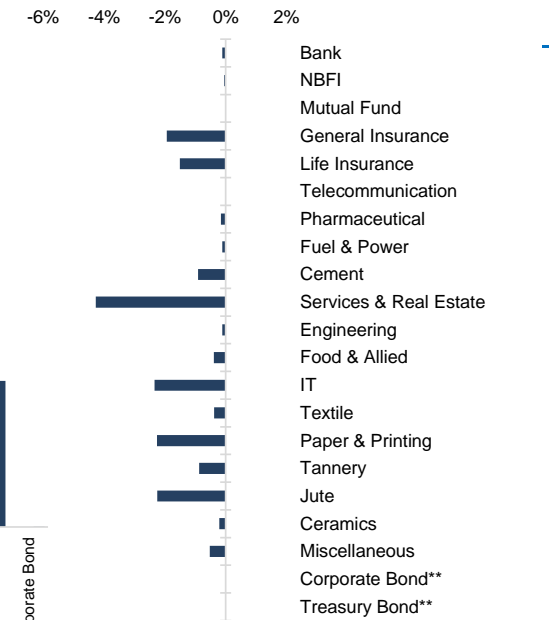


Figure: Sectorial Mcap Change



Market PE 18.3x

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	1,448	1,449	-1.64	-0.11%	35	682,413	9.3%	91.1	2.5%	12.1x	0.7x	GP	386,996	8.6%	0.2	11.9x	7.3x
NBFI	1,919	1,920	-0.98	-0.05%	23	186,707	2.5%	9.0	0.2%	NM	4.7x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	828	-0.21	-0.02%	37	37,444	0.5%	15.9	0.4%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.4x	6.2x
General Insurance	3,442	3,510	-67.97	-1.94%	42	100,448	1.4%	329.1	8.9%	18.6x	1.6x	SQURPHARMA	186,421	4.1%	104.6	9.9x	1.7x
Life Insurance	2,634	2,674	-40.18	-1.50%	15	73,618	1.0%	305.7	8.3%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.2	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,701	3,707	-5.74	-0.15%	34	717,909	9.8%	397.1	10.8%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,700	1,701	-1.92	-0.11%	23	448,297	6.1%	115.3	3.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,524	2,547	-23.11	-0.91%	7	121,237	1.7%	165.6	4.5%	26.7x	2.6x	BERGERPBL	84,890	1.9%	15.8	27.7x	6.1x
Services & Real Estate	1,803	1,884	-80.52	-4.27%	8	71,250	1.0%	144.1	3.9%	24.2x	0.9x	LHBL	78,044	1.7%	110.5	13.3x	3.9x
Engineering	4,483	4,488	-5.06	-0.11%	42	526,124	7.2%	237.0	6.4%	68.8x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,447	21,530	-82.51	-0.38%	21	396,857	5.4%	722.6	19.6%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	2,992	3,064	-71.62	-2.34%	11	39,008	0.5%	203.0	5.5%	27.3x	2.8x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,626	1,632	-6.19	-0.38%	58	170,216	2.3%	254.5	6.9%	79.3x	1.2x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	10,531	10,774	-243.07	-2.26%	6	40,574	0.6%	271.1	7.4%	39.1x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,212	3,241	-28.29	-0.87%	6	33,927	0.5%	94.3	2.6%	46.4x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,475	16,854	-378.58	-2.25%	3	4,030	0.1%	45.6	1.2%	NM	-1399.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	681	683	-1.45	-0.21%	5	31,505	0.4%	20.2	0.5%	52.3x	1.9x	UNILEVERCL	39,755	0.9%	12.6	46.0x	22.6x
Miscellaneous	4,176	4,198	-22.04	-0.53%	14	227,386	3.1%	259.9	7.1%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	36,585	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,805,932	38.3%	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	11.6	+2.7%	8.5	NM	2.0x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOE	25.9	-8.5%	236.7	NM	6.5x
NITOLINS	39.8	+2.1%	4.5	20.3x	1.3x	BATBC	74,086	4.2%	15.4x	6.2x	SONALIPAPR	652.9	-0.7%	191.6	69.8x	3.8x
NAVANACNG	24.9	+2.0%	5.1	NM	0.8x	BEXIMCO	69,196	4.0%	12.0x	1.2x	GEMINISEA	719.1	-7.5%	114.5	34.3x	28.3x
FARCHEM	11.1	+1.8%	24.5	NM	1.0x	RENATA	68,042	3.9%	38.0x	4.6x	LHBL	67.2	-0.9%	110.5	13.3x	3.9x
JANATAINS	39.1	+1.8%	43.2	27.8x	2.5x	BXPHARMA	45,564	2.6%	14.6x	1.5x	SQURPHARMA	210.3	-0.1%	104.6	9.9x	1.7x
MIRAKHTER	51.6	+1.6%	7.5	21.2x	1.1x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	KBPPWBIL	23.9	-8.8%	98.4	NM	2.0x
CONTININS	46.6	+1.5%	40.2	77.7x	2x	GP	38,700	2.2%	11.9x	7.3x	AIL	88.6	-4.2%	95.8	55.4x	3.9x
RUPALIINS	29.4	+1.4%	10.7	30.0x	1.3x	BRACBANK	30,964	1.8%	8.3x	0.9x	RUPALILIFE	108.4	-4.7%	87.3	NM	NM
SIMTEX	23.6	+1.3%	25.7	25.9x	1.1x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	EMERALDOIL	144.3	-3.5%	82.8	NM	NM
RELIANCE1	10.0	+1.0%	0.1	NM	0.9x	LHBL	28,936	1.7%	13.3x	3.9x	LEGACYFOOT	112.4	-6.6%	77.1	NM	12.6x

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)
KBPPWBIL	23.9	-8.8%	98.4	NM	2.0x	PUBALIBANK	18,880	1.1%	4.7x	0.6x	SEAPEARL	215.0	186.6	13.0	535	100.75
SEAPEARL	186.6	-8.7%	74.1	27.0x	11x	CITYBANK	18,235	1.0%	5.5x	0.7x	CONTININS	48.0	48.0	3.0	1,994	95.73
FUWANGFOOD	25.9	-8.5%	236.7	NM	6.5x	OLYMPIC	16,995	1.0%	17.5x	2.9x	DBH	55.8	51.1	12.0	579	30.31
SHYAMPSUG	103.0	-7.9%	3.2	NM	NM	ROBI	15,714	0.9%	69.8x	2.5x	BATBC	480.0	479.8	16.0	53	25.61
MONNOAGML	758.5	-7.5%	22.2	NM	4.3x	ALARABANK	14,417	0.8%	15.8x	1.1x	GP	261.6	261.6	11.0	84	21.84
GEMINISEA	719.1	-7.5%	114.5	34.3x	28.3x	BSRMLTD	14,210	0.8%	NM	0.7x	SONALIPAPR	640.0	630.0	3.0	33	20.95
LEGACYFOOT	112.4	-6.6%	77.1	NM	12.6x	PRIMEBANK	13,629	0.8%	5.2x	0.7x	MTB	14.1	14.1	6.0	1,238	17.45
NORTHERN	213.8	-6.6%	3.6	NM	2.6x	SEAPEARL	13,553	0.8%	27.0x	10.8x	SUMITPOWER	30.6	30.6	21.0	394	12.06
IMAMBUTTON	117.8	-6.2%	7.0	NM	24.5x	UPGDCL	13,547	0.8%	16.7x	4.4x	BSCCL	236.0	236.0	1.0	50	11.80
BANGAS	125.6	-6.0%	10.6	NM	6.0x						CITYBANK	21.4	21.4	1.0	500	10.70

* 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
SEAPEARL	215.0	186.6	100.8	535	13
CONTININS	48.0	48.0	95.7	1,994	3
DBH	55.8	51.1	30.3	579	12
BATBC	480.0	479.8	25.6	53	16
GP	261.6	261.6	21.8	84	11
SONALIPAPR	640.0	630.0	20.9	33	3
MTB	14.1	14.1	17.4	1,238	6
SUMITPOWER	30.6	30.6	12.1	394	21
BSCCL	236.0	236.0	11.8	50	1
CITYBANK	21.4	21.4	10.7	500	1
EMERALDOIL	144.0	140.0	10.0	71	2
SIMTEX	24.1	24.0	7.3	305	3
RELIANCE1	9.9	9.9	6.9	700	3
INTRACO	42.0	42.0	6.7	160	1
GEMINISEA	812.0	780.0	6.5	8	2
LRBDL	35.1	31.6	5.5	172	9
ICBEPMF1S1	7.1	7.1	5.1	717	2
IFADAUTOS	42.0	41.0	4.7	114	8
LHBL	68.7	68.7	4.1	60	1
MERCANBANK	12.7	12.2	3.3	271	3
BRACBANK	32.3	32.3	3.0	94	3
AL-HAJTEX	178.0	178.0	2.1	12	1
Total			446.3		172

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

SEMLLECMF

The Trustee Board of the fund has declared 5% cash dividend based on Net Income and Retained Earnings for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has also reported EPU of Tk. 0.22, NAV per unit at market price of Tk. 10.52, NAV per unit at cost of Tk. 11.41 and NOCFPU of Tk. 0.35 for the year ended June 30, 2023 as against Tk. 0.46, Tk. 10.80, Tk. 11.64 and Tk. 0.51 respectively for the year ended June 30, 2022.

SEMLFBSLGF

The Trustee Board of the Fund has declared 1% cash dividend based on Net Income and Retained Earnings for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has also reported EPU of Tk. 0.09, NAV per unit at market price of Tk. 10.12, NAV per unit at cost of Tk. 10.36 and NOCFPU of Tk. 0.33 for the year ended June 30, 2023 as against Tk. 0.93, Tk. 11.54, Tk. 11.53 and Tk. 0.88 respectively for the year ended June 30, 2022.

TRUSTB1MF

The Trustee Committee of the Fund has declared 5% Cash Dividend for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has also reported EPU of Tk. (0.10), NAV per unit at market price of Tk. 10.62, NAV per unit at cost of Tk. 11.73 and NOCFPU of Tk. 0.66 for the year ended June 30, 2023 as against Tk. 0.79, Tk. 11.41, Tk. 11.64 and Tk. 1.20 respectively for the year ended June 30, 2022.

EBL1STMF

The Trustee Committee of the Fund has declared No Dividend for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has also reported EPU of Tk. (0.29), NAV per unit at market price of Tk. 9.77, NAV per unit at cost of Tk. 11.16 and NOCFPU of Tk. 0.09 for the year ended June 30, 2023 as against Tk. 0.19, Tk. 10.66, Tk. 11.69 and Tk. 0.93 respectively for the year ended June 30, 2022.

FBFIF

The Trustee Committee of the Fund has declared 5% cash dividend for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has reported EPU of Tk. (0.11), NAV per unit at market price of Tk. 10.64, NAV per unit at cost of Tk. 11.51 and NOCFPU of Tk. 0.72 for the year ended June 30, 2023 as against Tk. 0.69, Tk. 11.41, Tk. 11.35 and Tk. 0.90 respectively for the year ended June 30, 2022.

1JANATAMF

The Trustee Committee of the Fund has declared No Dividend for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has reported EPU of Tk. (0.32), NAV per unit at market price of Tk. 9.78, NAV per unit at cost of Tk. 11.18 and NOCFPU of Tk. 0.28 for the year ended June 30, 2023 as against Tk. 0.24, Tk. 10.80, Tk. 11.64 and Tk. 1.24 respectively for the year ended June 30, 2022.

IFIC1STMF

The Trustee Committee of the Fund has declared No Dividend for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has reported EPU of Tk. (0.22), NAV per unit at market price of Tk. 9.98, NAV per unit at cost of Tk. 11.40 and NOCFPU of Tk. 0.40 for the year ended June 30, 2023 as against Tk. 0.35, Tk. 10.90, Tk. 11.57 and Tk. 1.21 respectively for the year ended June 30, 2022.

EXIM1STMF

The Trustee Committee of the Fund has declared 3% cash dividend for the year ended June 30, 2023. Record date: 04.09.2023. The Fund has reported EPU of Tk. (0.20), NAV per unit at market price of Tk. 10.37, NAV per unit at cost of Tk. 11.48 and NOCFPU of Tk. 0.71 for the year ended June 30, 2023 as against Tk. 0.71, Tk. 11.27, Tk. 11.42 and Tk. 0.98 respectively for the year ended June 30, 2022.

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BEXGSUKUK

Bangladesh Export Import Company Limited, the Originator of Beximco Green-Sukuk Al Istisna, has informed the completion of the following works financed through Sukuk Fund. 1. Teesta Solar Limited's 200 MW (AC) Solar PV Power plant in Sundarganj, Gaibandha: This project utilized the full BDT 18,818.00 million allocated from the Sukuk Fund and has successfully started commercial operations on January 08, 2023. 2. Expansion of Textile Division: This expansion project utilized the full BDT 8,059.00 million allocated from the Sukuk Fund and has successfully commissioned the textile machineries arranged through financing and refinancing. It has enhanced Textile Division's capacity in spinning, denim, yarn dyeing, knitting, printing and washing units. With the completion of the above two, BDT 26,877.00 million out of a total BDT 30,000.00 million Sukuk Fund has been successfully utilized and the assets thereof have started generating revenue. The company has further informed that the third project, i.e. Korotoa Solar Limited's 30 MW (AC) Solar Project in Tetulia, Panchagarh is currently under construction and will be fully operational by June 2024.

PRAGATIINS

The company has informed that the Board of Directors of the Company has decided to invest 10% equivalent to Tk. 12.50 crore (Taka Twelve Crore Fifty Lacs) only of the paid-up capital of the proposed Pragati Digital Bank, PLC subject to the approval of concerned authorities.

CITYBANK

Refer to their earlier news disseminated by DSE on 09.08.2023, the Company has further informed that to make consortium base stronger and for justifying the proposed Digital Bank's name Digi10 Bank PLC, the consortium unanimously decided to include another bank. As such the Board of the company has decided to make amendment in the proposal. Hence, the Company has requested to read the information regarding investment in proposed Digital Bank as follows instead of their earlier disclosure: "Based on management's proposal, the Board of Directors of the Company has approved to participate in the consortium of 10 banks for obtaining the Digital Bank license from Bangladesh Bank in the name of "Digi10 Bank Plc." The Company will invest initially 10% of the paid-up capital of the proposed Digital Bank (i.e., BDT 125,000,000.00 named "Digi10 Bank Plc." as will each of the other members of the consortium."

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