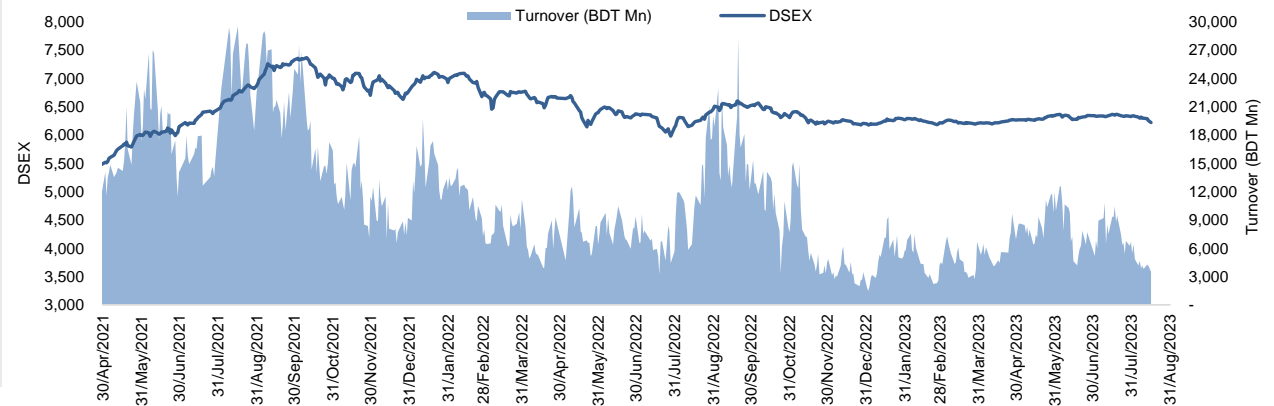


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.58%) lost 36.34 points and closed at 6,220.80. The blue-chip index DS30 (-0.75%), the Shariah-based index DSES (-0.54%), and the large-cap index CDSET (-0.24%) closed at 2,108.66, 1,350.63, and 1,205.80 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.41% followed by Bank (-0.22%), Pharmaceutical (-0.20%), Fuel & Power (-0.17%), Engineering (-0.11%), NBFi (-0.02%), and Telecommunication (0.00%), respectively. Block trades contributed 10.0% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (-10.0%) was the most traded share with a turnover of BDT 269 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,220.80	6,257.14	-36.34	-0.58%	+0.2%
DS30	2,108.66	2,124.62	-15.96	-0.75%	-3.9%
DSES	1,350.63	1,357.95	-7.32	-0.54%	-0.6%
CDSET	1,205.80	1,208.71	-2.91	-0.24%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	16	146	139	301
A Category (Equity)	7	93	93	193
B Category (Equity)	9	41	35	85
N Category (Equity)	0	3	2	5
Z Category (Equity)	0	9	9	18
Mutual Funds	0	3	21	24
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,714,392	7,733,590	-0.2%
	Mn USD	70,612	70,788	
Turnover	Mn BDT	3,515	4,138	-15.0%
	Mn USD	32	38	
Volume	Mn Shares	66	86	-24.0%
No. of Trade		91,679	114,269	-19.8%

* Average Interbank Exchange Rate is BDT 109.25 as of Aug 16, 2023

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Figure: Sectorial Turnover (BDT Mn)

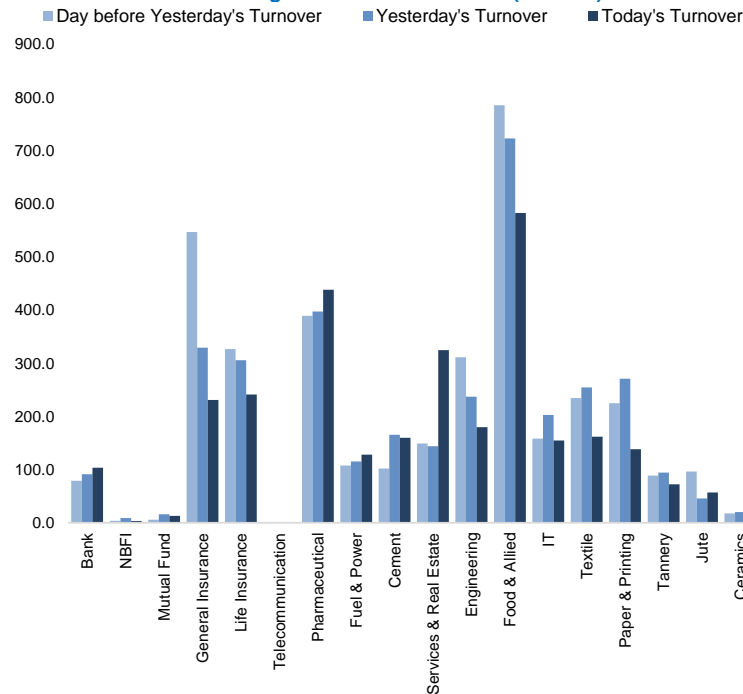
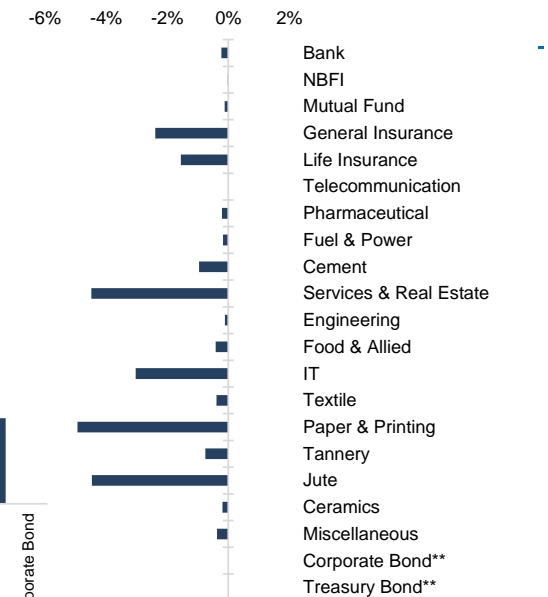


Figure: Sectorial Mcap Change



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	1,444	1,448	-3.23	-0.22%	35	680,892	9.3%	103.7	3.3%	12.1x	0.7x	GP	386,996	8.6%	0.6	11.9x	7.3x
NBFI	1,918	1,919	-0.35	-0.02%	23	186,673	2.6%	3.5	0.1%	NM	4.7x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	827	828	-0.96	-0.12%	37	37,401	0.5%	12.7	0.4%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.4x	6.2x
General Insurance	3,360	3,442	-82.14	-2.39%	42	98,051	1.3%	231.1	7.3%	18.2x	1.5x	SQURPHARMA	185,977	4.1%	239.8	9.9x	1.7x
Life Insurance	2,593	2,634	-40.74	-1.55%	15	72,479	1.0%	241.1	7.6%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.6	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,693	3,701	-7.52	-0.20%	34	716,450	9.8%	438.4	13.9%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,697	1,700	-2.92	-0.17%	23	447,527	6.1%	128.0	4.0%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,500	2,524	-24.07	-0.95%	7	120,081	1.6%	159.9	5.1%	26.5x	2.6x	BERGERPBL	84,844	1.9%	14.4	27.7x	6.1x
Services & Real Esta	1,723	1,803	-80.72	-4.48%	8	68,061	0.9%	324.4	10.2%	23.1x	0.9x	LHBL	77,696	1.7%	131.2	13.2x	3.9x
Engineering	4,478	4,483	-4.75	-0.11%	42	525,566	7.2%	179.8	5.7%	68.8x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,360	21,447	-87.45	-0.41%	21	395,239	5.4%	582.4	18.4%	19.9x	7.5x	BXPHARMA	65,222	1.4%	0.1	14.6x	1.5x
IT	2,902	2,992	-90.50	-3.02%	11	37,829	0.5%	154.6	4.9%	26.5x	2.7x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,620	1,626	-6.20	-0.38%	58	169,567	2.3%	162.1	5.1%	79.0x	1.2x	BEACONPHAR	56,595	1.3%	0.0	80.9x	9.2x
Paper & Printing	10,012	10,531	-519.17	-4.93%	6	38,574	0.5%	138.2	4.4%	37.2x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,188	3,212	-24.03	-0.75%	6	33,673	0.5%	72.4	2.3%	46.0x	3.2x	DUTCHBANGL	44,203	1.0%	0.4	7.9x	1.0x
Jute	15,740	16,475	-735.18	-4.46%	3	3,850	0.1%	57.2	1.8%	NM	-1336.7x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	681	-1.27	-0.19%	5	31,446	0.4%	14.1	0.4%	52.2x	1.9x	UNILEVERCL	39,510	0.9%	9.1	45.7x	22.5x
Miscellaneous	4,161	4,176	-15.47	-0.37%	14	226,543	3.1%	160.8	5.1%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	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	2,805,962	38.4%	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
FUWANGFOOD	27.7	+6.9%	169.4	NM	7.0x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	SEAPEARL	168.0	-10.0%	269.4	24.3x	9.7x
KPPL	10.0	+3.1%	4.5	NM	NM	BATBC	74,086	4.2%	15.4x	6.2x	SQURPHARMA	209.8	-0.2%	239.8	9.9x	1.7x
DESHBANDHU	23.5	+3.1%	50.3	67.1x	1.3x	BEXIMCO	69,196	4.0%	12.0x	1.2x	FUWANGFOOD	27.7	+6.9%	169.4	NM	7.0x
SIMTEX	24.1	+2.1%	35.0	26.5x	1.1x	RENATA	68,042	3.9%	38.0x	4.6x	LHBL	66.9	-0.4%	131.2	13.2x	3.9x
GENNEXT	6.2	+1.6%	16.7	NM	0.5x	BXPHARMA	45,564	2.6%	14.6x	1.5x	GEMINISEA	665.2	-7.5%	108.2	31.7x	26.2x
DAFODILCOM	67.1	+1.4%	1.9	94.5x	4.9x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RDFOOD	46.3	-9.6%	91.0	37.6x	2.9x
YPL	22.4	+1.4%	17.0	NM	4x	GP	38,700	2.2%	11.9x	7.3x	RUPALILIFE	103.5	-4.5%	77.2	NM	NM
KBPPWBIL	24.1	+0.8%	51.4	NM	2.0x	BRACBANK	30,964	1.8%	8.3x	0.9x	SONALIPAPR	619.1	-5.2%	75.6	66.2x	3.6x
JHRML	77.6	+0.8%	42.1	33.6x	2.5x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	AIL	84.5	-4.6%	59.9	52.8x	3.7x
BATASHOE	1,000.7	+0.7%	1.8	26.6x	3.5x	LHBL	28,936	1.7%	13.2x	3.9x	DELTALIFE	137.0	-0.2%	55.9	NM	NM
						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%	17.6x	2.9x						
						ROBI	15,714	0.9%	69.8x	2.5x						
						ALARABANK	14,417	0.8%	15.7x	1.1x						
						BSRMLTD	14,210	0.8%	NM	0.7x						
						PRIMEBANK	13,629	0.8%	5.1x	0.7x						
						SEAPEARL	13,553	0.8%	24.3x	9.7x						
						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
BRACBANK	33.0	32.3	99.6	3,018	2
DBH	51.2	51.1	52.1	1,020	22
GP	273.0	261.6	46.1	174	7
SQURPHARMA	209.8	209.8	28.5	136	1
RDFOOD	55.0	51.2	21.3	410	6
INTRACO	39.8	39.8	14.3	360	1
EMERALDOIL	138.5	138.5	13.9	100	1
BATBC	557.0	479.8	6.4	12	7
SIMTEX	24.5	24.5	4.7	190	1
UCB	11.2	11.2	3.2	286	3
SEAPEARL	200.0	168.1	3.1	16	3
ACIFORMULA	142.9	139.7	3.0	22	6
HRTEX	125.0	125.0	2.8	22	1
LRBDL	36.9	31.6	2.7	82	4
KBPPWBIL	26.2	26.2	2.6	100	1
PREMIERBAN	11.6	11.6	2.3	200	1
IFIC	11.2	11.2	2.1	188	1
ICB	88.0	88.0	2.0	23	1
ACI	241.0	241.0	1.8	8	2
UNIONINS	59.3	59.3	1.8	30	1
JHRML	69.3	69.3	1.7	24	1
FORTUNE	68.2	68.2	1.6	24	2
Total			350.2		124

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

ATCSLGF

The Trustee Board of the fund has declared No dividend for the year ended June 30, 2023. The Fund has also reported EPU of Tk. (0.23), NAV per unit at market price of Tk. 10.25, NAV per unit at cost of Tk. 11.10 and NOCFPU of Tk. 0.14 for the year ended June 30, 2023 as against Tk. 0.50, Tk. 10.98, Tk. 11.48 and Tk. 0.98 respectively for the year ended June 30, 2022.

DBH1STMF

The Trustee Board of the Fund has declared 3% Cash Dividend based on the Net Income and Retained Earnings for the year ended June 30, 2023. Record date: 05.09.2023. The Fund has reported EPU of Tk. 0.29, NAV per unit at market price of Tk. 10.32, NAV per unit at cost of Tk. 10.36 and NOCFPU of Tk. 0.19 for the year ended June 30, 2023 as against Tk. 0.72, Tk. 11.01, Tk. 10.73 and Tk. (0.38) respectively for the year ended June 30, 2022.

GRAMEENS2

The Trustee Committee of the Fund has approved 6.5% Cash Dividend based on present year realized profit, previous retained earnings and reserves for distribution of profit for the year ended June 30, 2023. Record date: 05.09.2023. The Fund has reported EPU of Tk. 0.65, NAV per unit at market price of Tk. 19.28, NAV per unit at cost of Tk. 10.80 and NOCFPU of Tk. 0.54 for the year ended June 30, 2023 as against Tk. 1.34, Tk. 20.52, Tk. 11.67, and Tk. 1.44 respectively for the year ended June 30, 2022.

RELIANCE1

The Trustee Board of the Fund has approved 5% Cash Dividend based on Net Income for the year ended June 30, 2023. Record date: 05.09.2023. The Fund has also reported EPU of Tk. 0.55, NAV per unit at market price of Tk. 13.80, NAV per unit at cost of Tk. 11.05 and NOCFPU of Tk. 0.41 for the year ended June 30, 2023 as against Tk. 1.01, Tk. 14.43, Tk. 11.50 and Tk. 1.11 respectively for the year ended June 30, 2022.

PRIMEBANK

The company has informed that the Board of Directors of the Company has approved, amongst others, the proposal for: a) setting up a subsidiary with an initial minimum paid-up capital of BDT 45.00 crore to provide mobile financial services under a bank-led MFS model; b) setting up a subsidiary with an initial minimum paid-up capital of BDT 10.00 crore to provide asset management services & alternative investment fund; and c) 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 shareholder by way of investing an initial minimum paid-up capital of BDT 12.50 crore only out of total initial paid-up capital of BDT 125.00 crore. All of the above are subject to required regulatory approvals.

GREENDELMF

The Trustee Board of the Fund has declared 1.5% Cash Dividend based on the Net Income and Retained Earnings for the year ended June 30, 2023. Record date: 05.09.2023. The Fund has reported EPU of Tk. 0.14, NAV per unit at market price of Tk. 10.16, NAV per unit at cost of Tk. 10.33 and NOCFPU of Tk. (0.23) for the year ended June 30, 2023 as against Tk. 0.72, Tk. 10.79, Tk. 10.72 and Tk. (0.54) respectively for the year ended June 30, 2022.

MIDLANDBNK

The company has informed that the Board of Directors of the Company has approved the proposal for joining in 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 (Twelve Crore Fifty Lac) subject to all regulatory approvals.

NRBCBANK

The company has informed that the Board of Directors of the Company has approved the proposal to become a Sponsor Shareholder by investing 10% of the total paid-up capital in the proposed Digital Bank, subject to approval of regulatory authorities.

DUTCHBANGL

The company has informed that the Board of Directors of the company has approved the following regarding new investments: i) Joining in the consortium of 10 (ten) Banks for obtaining Digital Bank License from Bangladesh Bank in the name of "Digi10 Bank PLC" by way of investing Tk. 12.50 crore out of the total initial paid-up capital of Tk. 125.00 crore (i.e. 10% share of the proposed digital bank) as a sponsor shareholder subject to all regulatory approvals; ii) Formation of a full-fledged Merchant Bank in the name of "Dutch-Bangla Bank Investment Limited" with proposed paid-up capital of Tk. 25.00 crore as a fully owned subsidiary company of Dutch-Bangla Bank Limited subject to all regulatory approvals; iii) formation of a Brokerage House (Stock Dealer and Stock Broker) in the name of "Dutch-Bangla Bank Securities Limited" with proposed paid-up capital of Tk. 10.00 crore as a fully owned subsidiary company of Dutch-Bangla Bank Limited subject to all regulatory approvals.

TRUSTBANK

The company has informed that the Board of Directors of the company has adopted the decision to join a 'Consortium' with 9 (nine) other commercial Banks who will jointly apply for a Digital Bank license in the name and style 'DiGi10 Bank PLC' and also to become a sponsor shareholder by way of investing an amount of BDT 12,50,00,000.00 only (10% of initial paid up capital of the said proposed Digital Bank) subject to obtaining approval from the regulatory authorities.

MEGHNAINS

The Company will be placed in 'A' category from existing 'B' category with effect from August 17, 2023 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2022.

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