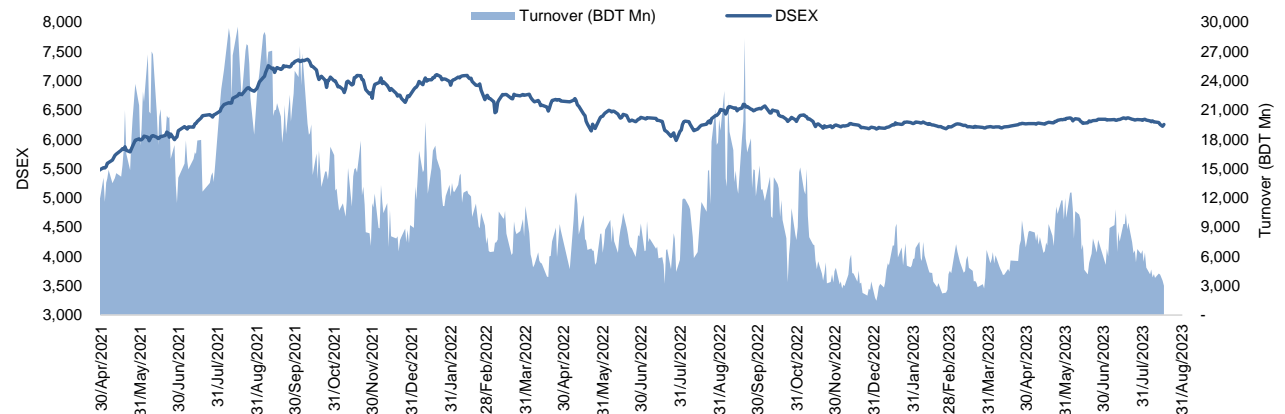


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.55%) gained 34.02 points and closed at 6,254.83. The blue-chip index DS30 (+0.62%), the Shariah-based index DSES (+0.55%), and the large-cap index CDSET (+0.22%) closed at 2,121.67, 1,358.10, and 1,208.43 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.48% followed by Food & Allied (+0.30%), Engineering (+0.27%), Bank (+0.20%), Fuel & Power (+0.20%), NBF (0.04%), and Telecommunication (0.00%), respectively. Block trades contributed 9.4% of the overall market turnover. Fu Wang Food Ltd. (+9.4%) was the most traded share with a turnover of BDT 276 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,254.83	6,220.80	+34.02	+0.55%	+0.8%
DS30	2,121.67	2,108.66	+13.01	+0.62%	-3.4%
DSES	1,358.10	1,350.63	+7.47	+0.55%	-0.1%
CDSET	1,208.43	1,205.80	+2.63	+0.22%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	153	8	160	321
A Category (Equity)	92	5	116	213
B Category (Equity)	50	2	35	87
N Category (Equity)	3	0	1	4
Z Category (Equity)	8	1	8	17
Mutual Funds	2	0	21	23
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,733,359	7,714,392	+0.2%
	Mn USD	70,624	70,451	
Turnover	Mn BDT	2,995	3,515	-14.8%
	Mn USD	27	32	
Volume	Mn Shares	70	66	+6.7%
No. of Trade		87,216	91,679	-4.9%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 17, 2023

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Figure: Sectorial Turnover (BDT Mn)

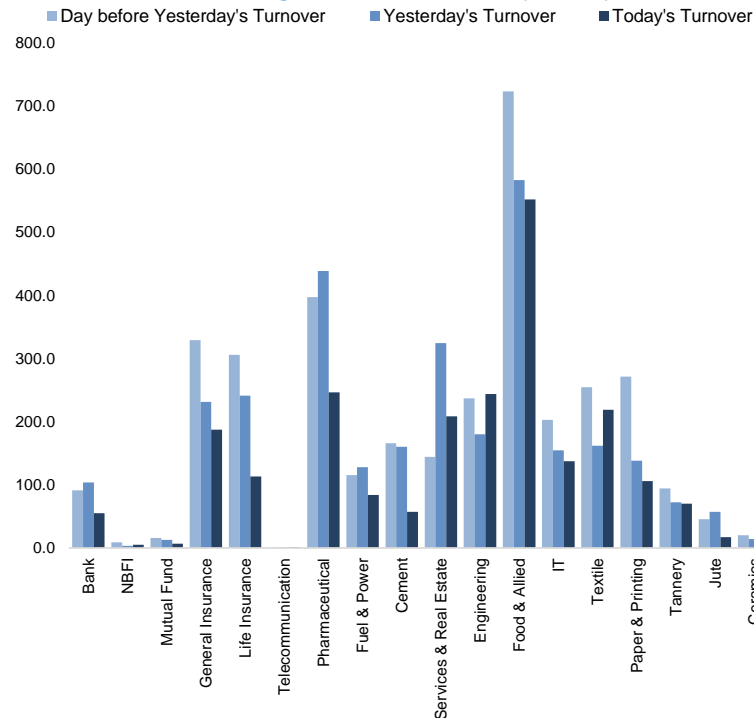
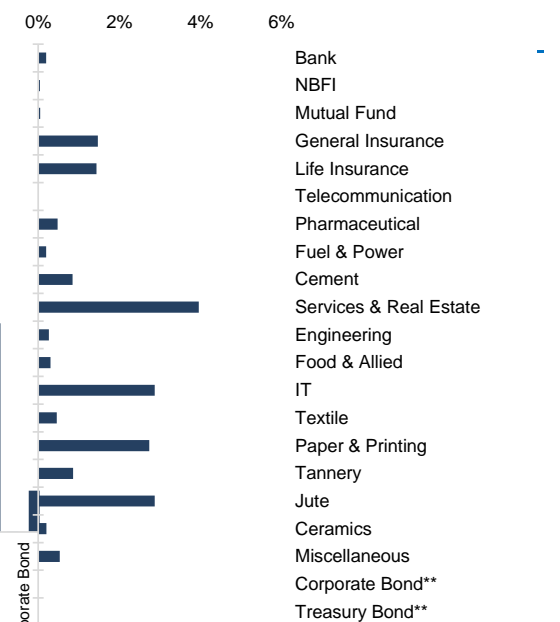


Figure: Sectorial Mcap Change



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	1,447	1,444	+2.89	+0.20%	35	682,253	9.3%	55.0	2.0%	12.1x	0.7x	GP	386,996	8.6%	0.9	11.9x	7.3x
NBFI	1,919	1,918	+0.83	+0.04%	23	186,753	2.5%	5.0	0.2%	NM	4.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	827	827	+0.38	+0.05%	37	37,418	0.5%	6.6	0.2%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.4x	6.2x
General Insurance	3,409	3,360	+49.39	+1.47%	42	99,493	1.4%	187.1	6.9%	18.5x	1.6x	SQURPHARMA	186,155	4.1%	35.2	9.9x	1.7x
Life Insurance	2,630	2,593	+37.32	+1.44%	15	73,522	1.0%	113.0	4.2%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	1.0	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,711	3,693	+17.73	+0.48%	34	719,890	9.8%	246.4	9.1%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,700	1,697	+3.36	+0.20%	23	448,412	6.1%	83.7	3.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,521	2,500	+21.20	+0.85%	7	121,099	1.7%	57.1	2.1%	26.7x	2.6x	BERGERPBL	84,862	1.9%	3.2	27.7x	6.1x
Services & Real Estate	1,791	1,723	+68.22	+3.96%	8	70,756	1.0%	208.3	7.7%	24.1x	0.9x	MARICO	79,701	1.8%	12.5	19.1x	16.2x
Engineering	4,490	4,478	+11.89	+0.27%	42	526,962	7.2%	243.9	9.0%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,425	21,360	+64.79	+0.30%	21	396,438	5.4%	551.5	20.3%	19.9x	7.5x	BXPHARMA	65,222	1.4%	0.3	14.6x	1.5x
IT	2,985	2,902	+83.37	+2.87%	11	38,916	0.5%	137.4	5.1%	27.2x	2.8x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,627	1,620	+7.39	+0.46%	58	170,340	2.3%	218.8	8.1%	79.4x	1.2x	BEACONPHAR	56,595	1.3%	0.1	80.9x	9.2x
Paper & Printing	10,286	10,012	+274.28	+2.74%	6	39,631	0.5%	106.0	3.9%	38.2x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,216	3,188	+27.35	+0.86%	6	33,962	0.5%	70.0	2.6%	46.4x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,193	15,740	+452.73	+2.88%	3	3,961	0.1%	17.0	0.6%	NM	-1375.1x	TITASGAS	40,459	0.9%	0.1	32.0x	0.6x
Ceramics	681	680	+1.37	+0.20%	5	31,510	0.4%	8.7	0.3%	52.3x	1.9x	UNILEVERCL	39,499	0.9%	30.5	45.7x	22.5x
Miscellaneous	4,183	4,161	+22.12	+0.53%	14	227,748	3.1%	330.5	12.2%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	36,585	0.5%	65.4	2.4%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,806,033	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
MEGHNAPET	38.6	+10.0%	3.9	NM	NM	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOE	30.3	+9.4%	276.3	NM	7.7x
OAL	11.4	+9.6%	23.8	NM	0.9x	BATBC	74,086	4.2%	15.4x	6.2x	BSC	114.0	+4.7%	210.0	7.3x	1.4x
LEGACYFOOT	111.1	+9.5%	62.1	NM	12.4x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	182.4	+8.6%	167.2	26.4x	10.6x
FUWANGFOOD	30.3	+9.4%	276.3	NM	7.7x	RENATA	68,042	3.9%	38.0x	4.6x	SIMTEX	25.7	+6.6%	86.9	28.2x	1.2x
YPL	24.5	+9.4%	36.6	NM	4.6x	BXPHARMA	45,564	2.6%	14.6x	1.5x	KBPPWBIL	25.7	+6.6%	72.8	NM	2.2x
DESHBANDHU	25.7	+9.4%	68.4	73.4x	1.4x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	DESHBANDHU	25.7	+9.4%	68.4	73.4x	1.4x
SEAPEARL	182.4	+8.6%	167.2	26.4x	11x	GP	38,700	2.2%	11.9x	7.3x	LEGACYFOOT	111.1	+9.5%	62.1	NM	12.4x
PAPERPROC	222.6	+8.5%	21.9	45.2x	6.6x	BRACBANK	30,964	1.8%	8.3x	0.9x	GEMINISEA	691.4	+3.9%	55.2	33.0x	27.2x
NORTHERN	222.5	+8.1%	1.4	NM	2.7x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	SONALIPAPR	629.0	+1.6%	52.4	67.3x	3.7x
INTECH	24.6	+7.9%	2.0	NM	21.8x	LHBL	28,936	1.7%	13.3x	4.0x	EMERALDOIL	140.0	+2.3%	50.1	NM	NM

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)
NTC	408.5	-2.9%	4.7	NM	202.2x	PUBALIBANK	18,880	1.1%	4.7x	0.6x	SEAPEARL	175.0	151.2	10.0	289	47.49
AMBEEPHA	631.3	-1.5%	16.8	NM	33x	CITYBANK	18,235	1.0%	5.5x	0.7x	SIMTEX	26.5	23.5	9.0	1,670	43.25
UNIONINS	55.8	-0.7%	9.4	22.7x	3.1x	OLYMPIC	16,995	1.0%	17.6x	2.9x	EBL	28.3	27.0	33.0	1,222	33.83
RSRMSTEEL	18.1	-0.5%	1.1	NM	0.4x	ROBI	15,714	0.9%	69.8x	2.5x	GP	273.1	261.6	17.0	118	31.58
MPETROLEUM	202.4	-0.2%	0.7	5.8x	1.1x	ALARABANK	14,417	0.8%	15.8x	1.1x	DBH	51.1	51.1	10.0	500	25.55
KOHINOOR	448.5	-0.1%	6.5	39.3x	7.9x	BSRMLTD	14,210	0.8%	NM	0.7x	BRACBANK	32.3	32.3	3.0	445	14.36
UNILEVERCL	2,049.3	-0.0%	30.5	45.7x	22.5x	PRIMEBANK	13,629	0.8%	5.2x	0.7x	CITYBANK	21.4	21.4	1.0	500	10.70
RECKITT BEN	4,858.4	-0.0%	2.5	31.9x	34.2x	SEAPEARL	13,553	0.8%	26.4x	10.6x	SONALIPAPR	620.0	620.0	2.0	14	8.68
ABB1STMF	5.2	-0.0%	0.0	NM	0.6x	UPGDCL	13,547	0.8%	16.7x	4.4x	NBL	8.0	7.9	9.0	1,000	7.96
1JANATAMF	6.1	-0.0%	0.0	NM	0.6x						AL-HAJTEX	173.2	165.5	4.0	47	7.90

* 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	175.0	151.2	47.5	289	10
SIMTEX	26.5	23.5	43.3	1,670	9
EBL	28.3	27.0	33.8	1,222	33
GP	273.1	261.6	31.6	118	17
DBH	51.1	51.1	25.6	500	10
BRACBANK	32.3	32.3	14.4	445	3
CITYBANK	21.4	21.4	10.7	500	1
SONALIPAPR	620.0	620.0	8.7	14	2
NBL	8.0	7.9	8.0	1,000	9
AL-HAJTEX	173.2	165.5	7.9	47	4
BATBC	518.0	479.8	7.1	14	3
PTL	76.0	69.3	5.8	77	3
JAMUNABANK	19.1	18.9	3.5	185	4
PADMAOIL	204.1	202.0	3.3	16	5
BEXGSUKUK	83.0	82.0	2.8	34	4
LINDEBD	1,310.6	1,310.4	2.6	2	5
RENATA	1,141.9	1,141.9	2.4	2	1
SALVOCHEM	61.9	61.9	2.2	35	1
LRBDL	31.7	31.6	2.2	69	3
BSCCL	218.9	218.9	2.1	10	1
PEOPLESINS	40.0	40.0	2.0	50	1
PREMIERBAN	12.5	12.0	1.8	150	3
Total			282.9		151

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SEMLLECMF		0.0%	5%	Record Date	04-Sep-23

Important DSE News

FIRSTFIN

The Board of Directors has recommended No dividend for the year ended December 31, 2022. Date of AGM: 30.09.2023, Time: 3:00 PM, Venue: Digital Platform. Record Date: 07.09.2023. The Company has also reported EPS of Tk. (14.52), NAV per share of Tk. (28.84) and NOCFPS of Tk. 0.39 for the year ended December 31, 2022 as against Tk. (18.47), Tk. (14.32) and Tk. 0.23 respectively for the year ended December 31, 2021.

(Q1 Un-audited): EPS was Tk. (1.91) for January-March 2023 as against Tk. (2.02) for January-March 2022. NOCFPS was Tk. (0.24) for January-March 2023 as against Tk. 0.07 for January-March 2022. NAV per share was Tk. (30.75) as on March 31, 2023 and Tk. (16.35) as on March 31, 2022.

(Q2 Un-audited): EPS was Tk. (0.70) for April-June 2023 as against Tk. (2.10) for April-June 2022; EPS was Tk. (2.61) for January-June 2023 as against Tk. (4.12) for January-June 2022. NOCFPS was Tk. (0.32) for January-June 2023 as against Tk. 0.42 for January-June 2022. NAV per share was Tk. (31.45) as on June 30, 2023 and Tk. (18.44) as on June 30, 2022.

DHAKABANK

The company has informed that the Board of Directors of the company has decided to become a Sponsor Shareholder of the proposed 'Shonchoy Digital Bank PLC' by investing an amount of Tk. 12.50 crore only which is 10% of the minimum Paid-up Capital of Tk. 125.00 crore of the proposed digital bank subject to approval of regulatory authorities.

APOLOISPAT

The company has informed, among others, that their factory is out of production for the last two years. The company has also informed that they have huge financial burden, which is approximately BDT 900 crore (including penal interest) and other outside liabilities of BDT 200 crore.

AZIZPIPES

The Company has informed that Dr. Sawpan Kumar Dhar, Independent Director has been appointed as Chairman of the Company.

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