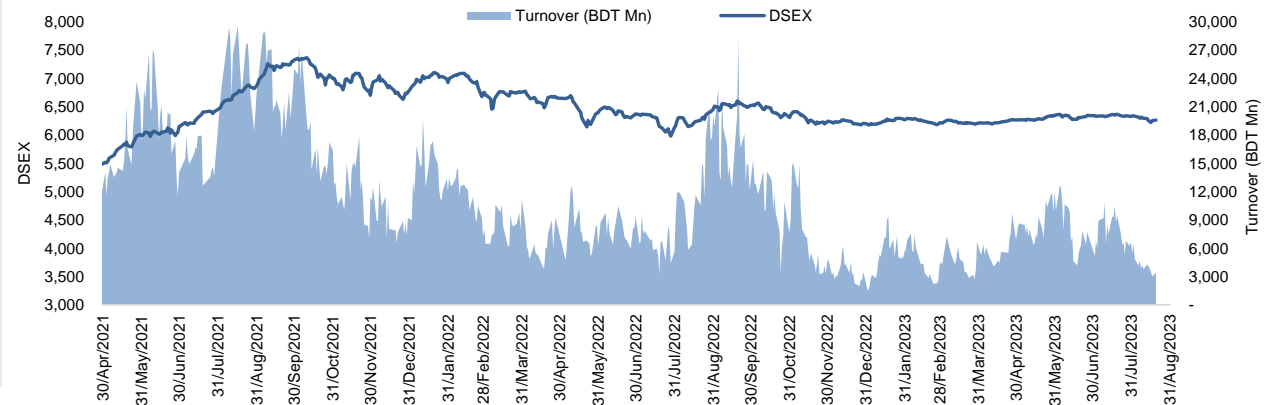


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.17%) gained 10.41 points and closed at 6,265.24. The blue-chip index DS30 (+0.22%), the Shariah-based index DSES (+0.17%), and the large-cap index CDSET (+0.13%) closed at 2,126.27, 1,360.35, and 1,210.00 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.36% followed by Pharmaceutical (+0.26%), Bank (+0.10%), Fuel & Power (+0.02%). NBF1 experienced the highest loss of 0.02% followed by Engineering (-0.02%), Telecommunication (0.00%). Block trades contributed 8.2% of the overall market turnover. Fu Wang Food Ltd. (+9.9%) was the most traded share with a turnover of BDT 332 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,265.24	6,254.83	+10.41	+0.17%	+0.9%
DS30	2,126.27	2,121.67	+4.60	+0.22%	-3.1%
DSES	1,360.35	1,358.10	+2.24	+0.17%	+0.1%
CDSET	1,210.00	1,208.43	+1.57	+0.13%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	90	63	162	315
A Category (Equity)	57	35	108	200
B Category (Equity)	27	23	42	92
N Category (Equity)	3	0	1	4
Z Category (Equity)	3	5	11	19
Mutual Funds	0	1	16	17
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,740,346	7,733,359	+0.1%
	Mn USD	70,704	70,640	
Turnover	Mn BDT	3,446	2,995	+15.0%
	Mn USD	31	27	
Volume	Mn Shares	72	70	+2.8%
No. of Trade		92,572	87,216	+6.1%

* Average Interbank Exchange Rate is BDT 109.48 as of Aug 20, 2023

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	HZ Towhidi Khan Senior Research Associate (880) 1708805224 hztowhidi.khan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

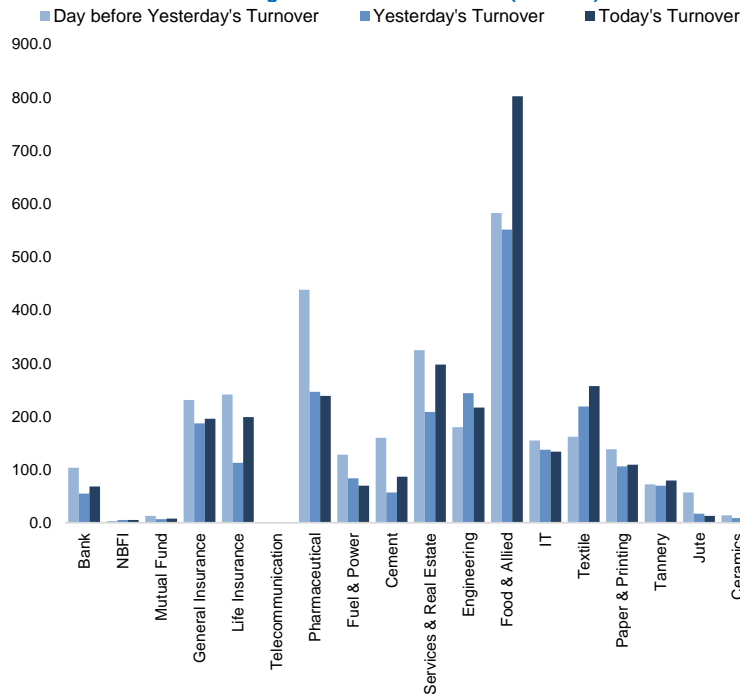
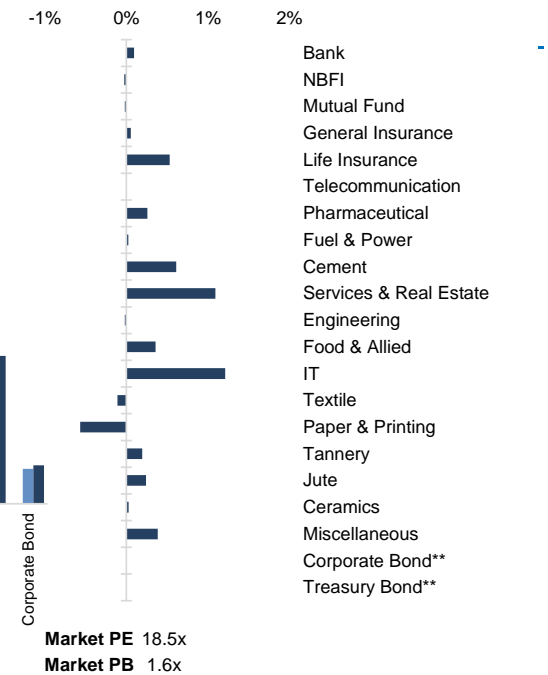


Figure: Sectorial Mcap Change



* 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	1,447	+1.39	+0.10%	35	682,910	9.3%	68.2	2.2%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,919	1,919	-0.47	-0.02%	23	186,707	2.5%	5.4	0.2%	NM	5.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	827	827	-0.15	-0.02%	37	37,411	0.5%	7.7	0.2%	NM	0.7x	BATBC	280,098	6.2%	0.7	15.4x	6.2x
General Insurance	3,411	3,409	+1.88	+0.06%	42	99,548	1.4%	195.6	6.2%	18.5x	1.6x	SQURPHARMA	186,155	4.1%	16.5	9.9x	1.7x
Life Insurance	2,644	2,630	+13.96	+0.53%	15	73,912	1.0%	198.9	6.3%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.3	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,721	3,711	+9.58	+0.26%	34	721,747	9.8%	238.4	7.5%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,700	1,700	+0.42	+0.02%	23	448,522	6.1%	69.6	2.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,537	2,521	+15.44	+0.61%	7	121,841	1.7%	86.7	2.7%	26.9x	2.6x	BERGERPBL	85,229	1.9%	20.7	27.8x	6.1x
Services & Real Esta	1,810	1,791	+19.56	+1.09%	8	71,529	1.0%	297.6	9.4%	24.3x	0.9x	MARICO	81,248	1.8%	19.1	19.5x	16.5x
Engineering	4,489	4,490	-0.78	-0.02%	42	526,870	7.2%	216.8	6.9%	68.9x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,501	21,425	+76.78	+0.36%	21	397,859	5.4%	802.4	25.4%	20.0x	7.5x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,021	2,985	+36.24	+1.21%	11	39,388	0.5%	133.6	4.2%	27.6x	2.8x	BRACBANK	57,596	1.3%	0.2	8.3x	0.9x
Textile	1,625	1,627	-1.75	-0.11%	58	170,157	2.3%	257.1	8.1%	79.3x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,228	10,286	-58.33	-0.57%	6	39,406	0.5%	109.0	3.4%	38.0x	2.0x	ISLAMIBANK	52,486	1.2%	4.1	8.4x	0.7x
Tannery	3,222	3,216	+6.31	+0.20%	6	34,028	0.5%	79.7	2.5%	46.5x	3.2x	DUTCHBANGL	44,203	1.0%	0.3	7.9x	1.0x
Jute	16,232	16,193	+39.05	+0.24%	3	3,971	0.1%	12.8	0.4%	NM	-1378.4x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	681	681	+0.19	+0.03%	5	31,518	0.4%	34.1	1.1%	53.5x	1.9x	UNILEVERCL	39,709	0.9%	1.4	45.9x	22.6x
Miscellaneous	4,199	4,183	+16.12	+0.39%	14	228,625	3.1%	278.0	8.8%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	36,585	0.5%	72.6	2.3%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.01%	232	2,806,175	38.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	33.3	+9.9%	331.7	NM	8.4x
EMERALDOIL	152.9	+9.2%	176.3	NM	NM
LEGACYFOOT	118.8	+6.9%	72.8	NM	13.3x
RUPALILIFE	110.6	+6.9%	126.0	NM	NM
ANLIMAYARN	34.1	+4.3%	2.6	94.7x	3.2x
PRAGATILIF	124.1	+4.1%	25.1	NM	NM
GEMINISEA	718.8	+4.0%	141.3	34.3x	28x
SINOBANGLA	70.9	+3.4%	34.3	38.8x	2.5x
SEAPEARL	188.1	+3.1%	261.2	27.3x	10.9x
AAMRATECH	32.2	+2.9%	4.7	35.5x	3.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
IMAMBUTTON	103.0	-5.0%	11.2	NM	21.4x
SIMTEX	25.0	-2.7%	109.9	27.5x	1x
METROSPIN	35.7	-2.5%	21.6	36.5x	1.7x
INTECH	24.1	-2.0%	1.4	NM	21.3x
GQBALLPEN	128.6	-2.0%	10.3	NM	1.1x
MIDASFIN	10.1	-1.9%	0.3	7.6x	1.1x
CENTRALINS	36.7	-1.9%	0.3	20.1x	0.7x
PHENIXINS	34.4	-1.7%	0.1	20.8x	1.0x
RDFOOD	47.2	-1.7%	68.5	38.4x	2.9x
GENNEXT	6.3	-1.6%	21.7	NM	0.5x

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%	13.5x	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%	17.6x	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%	5.3x	0.7x
SEAPEARL	13,553	0.8%	27.3x	10.9x
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
FUWANGFOOD	33.3	+9.9%	331.7	NM	8.4x
SEAPEARL	188.1	+3.1%	261.2	27.3x	10.9x
EMERALDOIL	152.9	+9.2%	176.3	NM	NM
GEMINISEA	718.8	+4.0%	141.3	34.3x	28.3x
BSC	116.3	+2.0%	128.1	7.4x	1.5x
RUPALILIFE	110.6	+6.9%	126.0	NM	NM
SIMTEX	25.0	-2.7%	109.9	27.5x	1.1x
LEGACYFOOT	118.8	+6.9%	72.8	NM	13.3x
BEXGSUKUK	85.0	-	72.6	NM	NM
AIL	88.3	-0.5%	72.5	55.2x	3.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	200.6	164.3	13.0	385	66.83
EMERALDOIL	150.1	138.0	9.0	383	53.16
GP	273.1	261.6	8.0	126	34.04
SIMTEX	27.5	24.4	8.0	633	16.77
EBL	28.3	27.8	10.0	500	14.03
GEMINISEA	743.0	651.0	3.0	20	14.03
LHBL	69.0	69.0	1.0	150	10.35
BEXIMCO	115.4	104.1	5.0	83	9.51
BSCCL	212.5	212.5	1.0	25	5.31
PADMAOIL	205.0	202.0	6.0	25	5.06

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	200.6	164.3	66.8	385	13
EMERALDOIL	150.1	138.0	53.2	383	9
GP	273.1	261.6	34.0	126	8
SIMTEX	27.5	24.4	16.8	633	8
EBL	28.3	27.8	14.0	500	10
GEMINISEA	743.0	651.0	14.0	20	3
LHBL	69.0	69.0	10.4	150	1
BEXIMCO	115.4	104.1	9.5	83	5
BSCCL	212.5	212.5	5.3	25	1
PADMAOIL	205.0	202.0	5.1	25	6
MLDYEING	24.7	24.7	4.9	200	2
LRBDL	32.0	31.6	4.1	129	7
PREMIERBAN	13.8	12.8	4.0	300	2
NHFIL	38.0	37.7	3.8	100	5
SONALIPAPR	629.0	582.0	2.8	5	2
ANWARGALV	215.2	194.7	2.7	13	2
BXPHERMA	133.9	133.9	2.7	20	1
BSC	125.0	114.0	2.3	19	3
JHRML	86.9	86.9	2.1	24	1
BATBC	480.0	479.8	2.0	4	4
GSPFINANCE	27.3	27.3	2.0	73	1
BRACBANK	32.3	32.3	1.9	60	3
Total			281.0		121

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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	4-Sep-23
SEMLFBSLGF		0.0%	1%	Record Date	4-Sep-23
TRUSTB1MF		0.0%	5%	Record Date	4-Sep-23
EBL1STMF		0.0%	0%	Record Date	4-Sep-23

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Important DSE News

FAREASTFIN

The Board of Directors has recommended No dividend for the year ended December 31, 2022. Date of AGM: 27.09.2023, Time: 11:30 AM, Venue: Digital Platform. Record Date: 10.09.2023. The Company has also reported EPS of Tk. (14.06), NAV per share of Tk. (38.50) and NOCFPS of Tk. (1.06) for the year ended December 31, 2022 as against Tk. (25.55), Tk. (24.44) and Tk. (1.16) respectively for the year ended December 31, 2021.

The Board of Directors has recommended No dividend for the year ended December 31, 2021. Date of AGM: 27.09.2023, Time: 10:00 AM, Venue: Digital Platform. Record Date: 10.09.2023. The Company has also reported EPS of Tk. (25.55), NAV per share of Tk. (24.44) and NOCFPS of Tk. (1.16) for the year ended December 31, 2021 as against Tk. (1.74), Tk. 1.11 and Tk. 1.84 respectively for the year ended December 31, 2020.

(Q2 Un-audited): EPS was Tk. (1.56) for April-June 2023 as against Tk. (5.00) for April-June 2022; EPS was Tk. (2.13) for January-June 2023 as against Tk. (6.83) for January-June 2022. NOCFPS was Tk. (1.68) for January-June 2023 as against Tk. 1.26 for January-June 2022. NAV per share was Tk. (40.63) as on June 30, 2023 and Tk. (38.50) as on December 31, 2022.

(Q1 Un-audited): EPS was Tk. (0.57) for January-March 2023 as against Tk. (1.83) for January-March 2022. NOCFPS was Tk. 0.12 for January-March 2023 as against Tk. 1.30 for January-March 2022. NAV per share was Tk. (39.07) as on March 31, 2023 and Tk. (38.50) as on December 31, 2022.

(Q1 Un-audited): EPS was Tk. (1.83) for January-March 2022 as against Tk. (1.58) for January-March 2021. NOCFPS was Tk. 1.30 for January-March 2022 as against Tk. (0.33) for January-March 2021. NAV per share was Tk. (26.27) as on March 31, 2022 and Tk. (24.44) as on March 31, 2021.

(Q2 Un-audited): EPS was Tk. (5.00) for April-June 2022 as against Tk. (0.32) for April-June 2021; EPS was Tk. (6.83) for January-June 2022 as against Tk. (1.90) for January-June 2021. NOCFPS was Tk. 1.26 for January-June 2022 as against Tk. (0.30) for January-June 2021. NAV per share was Tk. (31.27) as on June 30, 2022 and Tk. (24.44) as on December 31, 2021.

(Q3 Un-audited): EPS was Tk. (5.00) for July-September 2022 as against Tk. (0.36) for July-September 2021; EPS was Tk. (11.83) for January-September 2022 as against Tk. (2.26) for January-September 2021. NOCFPS was Tk. 0.66 for January-September 2022 as against Tk. (1.11) for January-September 2021. NAV per share was Tk. (36.27) as on September 30, 2022 and Tk. (24.44) as on December 31, 2021.

BIFC

The Board of Directors has recommended No dividend for the year ended December 31, 2021. Date and time of AGM: To be notified later, Venue: Digital Platform. Record Date: 26.09.2023. The Company has also reported EPS of Tk. (9.78), NAV per share of Tk. (106.83) and NOCFPS of Tk. (2.64) for the year ended December 31, 2021 as against Tk. (8.10), Tk. (102.37) and Tk. (2.78) respectively for the year ended December 31, 2020.

STANCERAM

(Q3 Un-audited): EPS was Tk. (2.03) for January-March 2023 as against Tk. 0.10 for January-March 2022; EPS was Tk. (6.36) for July 2022-March 2023 as against Tk. (2.20) for July 2021-March 2022. NOCFPS was Tk. (2.83) for July 2022-March 2023 as against Tk. 0.87 for July 2021-March 2022. NAV per share was Tk. (2.15) as on March 31, 2023 and Tk. 6.66 as on June 30, 2022. Reasons for deviation: EPS has become negative figure for the period as the overall economic condition was dull for COVID-19 and Russia-Ukraine War. High cost of imported raw materials due to high cost of sea transport & Dollar rate fluctuation etc. adversely reduced sales and gross profit. But the company had to pay full salary and all other fixed cost. As a result, productions and sales of the factory decreased which resulted in decreased EPS of the Company. NOCFPS decreased as collection (advance) against sales are decreased.

CROWNCEMNT

The company has informed the Board of Directors of the company has taken the following decisions: 1. To sign a Joint Venture Consortium Agreement (JVCA) for sourcing of Dry Ash for smooth and regular production of Cement from Matarbari 2x600 MW Ultra Super Critical Coal Fired Power Plant. It's mentionable that agreement has not been signed yet. 2. To purchase 245 decimals of land adjacent to the Mukterpur Factory premises @ Tk. 6,00,000.00 (Taka six lac) only per decimal.

NAVANAPHAR

The company has informed that the Board of Directors of the company has decided to invest BDT 7,50,00,000.00 in the proposed Digital Bank namely 'UPAY Digital Bank PLC' as a sponsor shareholder subject to receiving approval from the Regulatory Authorities. The proposed digital bank's initial paid-up capital is BDT 125.00 Crore wherein the company will subscribe 6% share of the proposed digital bank.

ARAMIT

The company has informed that the Board of Directors of the company has decided to invest BDT 6,25,00,000.00 in the share capital of the proposed Digital Bank namely 'UPAY Digital Bank PLC' as a sponsor shareholder subject to receiving approval from the Regulatory Authorities. The proposed digital bank's initial paid-up capital is 125.00 Crore wherein the company will subscribe 5% in the share capital of the proposed digital bank.

GENEXIL

The company has informed that the Board of Directors of the Company has decided to invest BDT 12,50,00,000.00 (Taka Twelve Crore Fifty Lac Only) in the proposed Digital Bank named "UPAY Digital Bank PLC" as sponsor shareholder subject to the approval from regulatory authorities. The proposed digital bank's Paid-up capital is 125.00 crore wherein the Company will hold 10% stake of the proposed digital bank.

FUWANGFOOD

The Company has informed that Mr. Md. Afzal Hossain resigned from the position of Chairman & Director of the Board. The Company also informed that Mr. Md. Abul Kashem, Independent Director has been elected as Chairman of the Board and Mr. Mirza Rashed Nawaz has been appointed as nominated Director from Minori Bangladeshi Ltd.

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