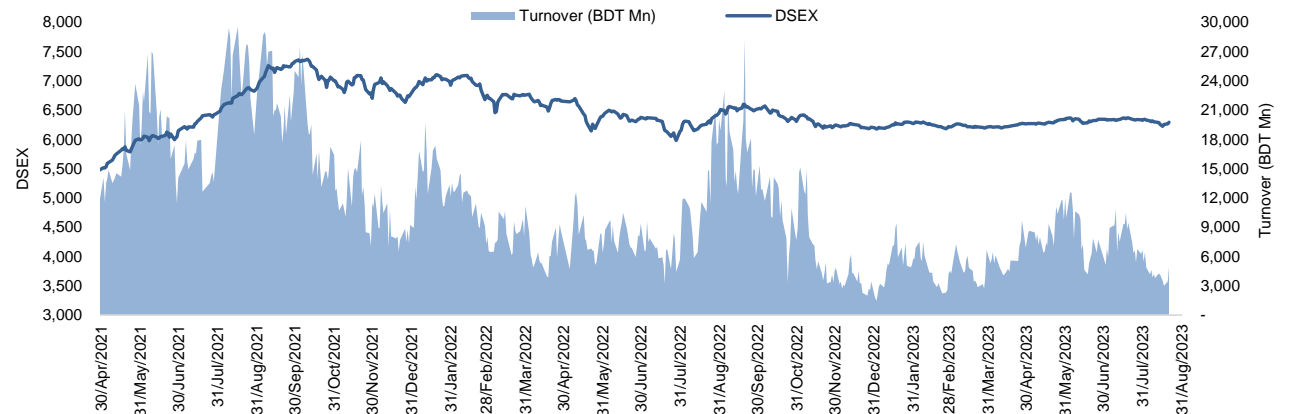


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.42%) gained 26.59 points and closed at 6,291.83. The blue-chip index DS30 (+0.49%), the Shariah-based index DSES (+0.46%), and the large-cap index CDSET (+0.10%) closed at 2,136.65, 1,366.66, and 1,211.22 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.39% followed by Pharmaceutical (+0.32%), Bank (+0.29%), Fuel & Power (+0.17%), Engineering (+0.12%), NBF (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 10.3% of the overall market turnover. Fu Wang Food Ltd. (+7.8%) was the most traded share with a turnover of BDT 395 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,291.83	6,265.24	+26.59	+0.42%	+1.4%
DS30	2,136.65	2,126.27	+10.38	+0.49%	-2.7%
DSES	1,366.66	1,360.35	+6.31	+0.46%	+0.6%
CDSET	1,211.22	1,210.00	+1.22	+0.10%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	142	27	156	325
A Category (Equity)	84	16	106	206
B Category (Equity)	52	6	38	96
N Category (Equity)	3	0	3	6
Z Category (Equity)	3	5	9	17
Mutual Funds	1	1	16	18
Corporate Bonds	0	0	5	5
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,758,304	7,740,346	+0.2%
	Mn USD	70,852	70,688	
Turnover	Mn BDT	4,957	3,446	+43.9%
	Mn USD	45	31	
Volume	Mn Shares	110	72	+53.0%
No. of Trade		124,337	92,572	+34.3%

\* Average Interbank Exchange Rate is BDT 109.50 as of Aug 21, 2023

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Figure: Sectorial Turnover (BDT Mn)

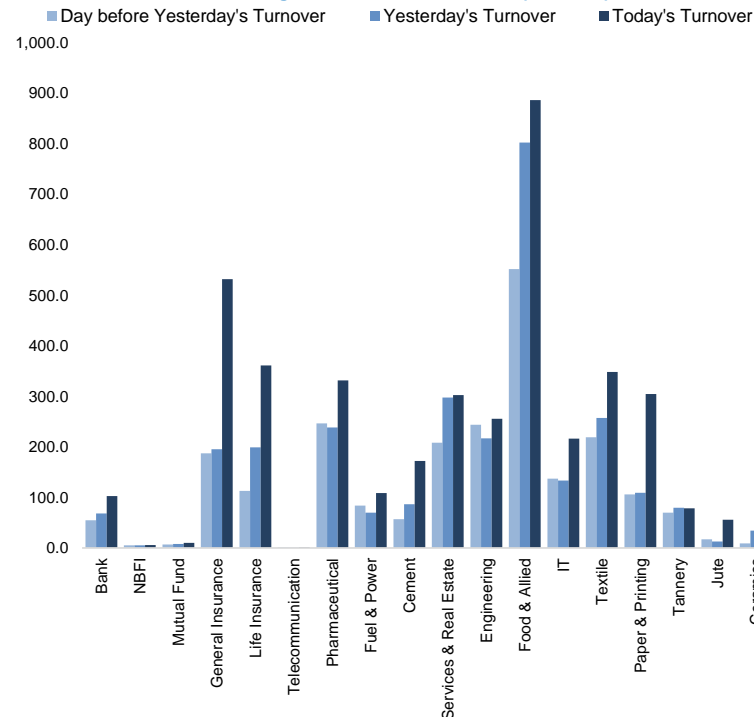
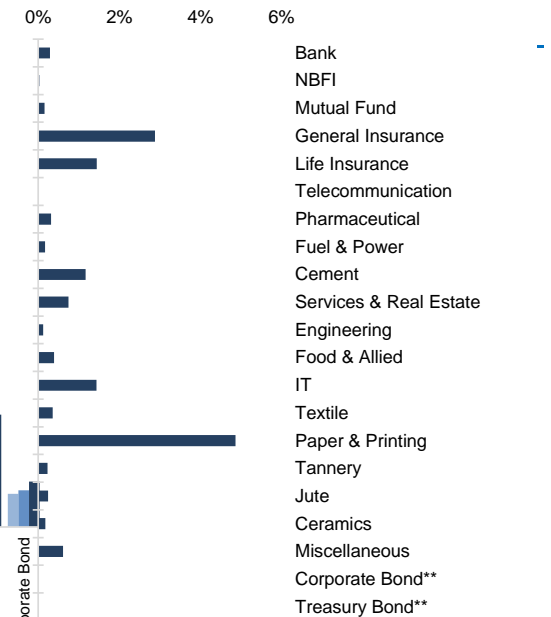


Figure: Sectorial Mcap Change



Market PE 18.5x

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	1,453	1,449	+4.19	+0.29%	35	684,887	9.3%	102.5	2.3%	12.1x	0.7x	GP	386,996	8.5%	0.5	11.9x	7.3x
NBFI	1,919	1,919	+0.62	+0.03%	23	186,768	2.5%	5.6	0.1%	NM	5.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	829	827	+1.29	+0.16%	37	37,469	0.5%	9.9	0.2%	NM	0.7x	BATBC	280,098	6.2%	3.7	15.4x	6.2x
General Insurance	3,509	3,411	+98.32	+2.88%	42	102,417	1.4%	531.6	12.0%	19.0x	1.6x	SQURPHARMA	186,066	4.1%	33.1	9.9x	1.7x
Life Insurance	2,683	2,644	+38.26	+1.45%	15	74,982	1.0%	361.3	8.1%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.8	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,732	3,721	+11.79	+0.32%	34	724,035	9.8%	331.4	7.5%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.2	16.7x	4.4x
Fuel & Power	1,703	1,700	+2.84	+0.17%	23	449,272	6.1%	108.8	2.4%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,566	2,537	+29.71	+1.17%	7	123,267	1.7%	172.3	3.9%	27.2x	2.7x	BERGERPBL	86,481	1.9%	13.1	28.3x	6.2x
Services & Real Estate	1,824	1,810	+13.56	+0.75%	8	72,065	1.0%	302.3	6.8%	24.5x	0.9x	MARICO	82,404	1.8%	17.3	19.8x	16.8x
Engineering	4,494	4,489	+5.44	+0.12%	42	527,509	7.2%	255.9	5.8%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,585	21,501	+83.48	+0.39%	21	399,403	5.4%	886.0	19.9%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,065	3,021	+43.49	+1.44%	11	39,955	0.5%	216.2	4.9%	28.0x	2.9x	BRACBANK	57,596	1.3%	0.3	8.3x	0.9x
Textile	1,631	1,625	+5.80	+0.36%	58	170,765	2.3%	348.3	7.8%	79.6x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,726	10,228	+498.00	+4.87%	6	41,325	0.6%	304.8	6.9%	39.9x	2.1x	ISLAMIBANK	52,486	1.2%	0.4	8.4x	0.7x
Tannery	3,229	3,222	+7.48	+0.23%	6	34,107	0.5%	78.5	1.8%	46.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.3	7.9x	1.0x
Jute	16,271	16,232	+39.10	+0.24%	3	3,980	0.1%	55.7	1.3%	NM	-1381.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	683	681	+1.21	+0.18%	5	31,574	0.4%	61.0	1.4%	53.6x	1.9x	UNILEVERCL	39,713	0.9%	13.2	45.9x	22.6x
Miscellaneous	4,225	4,199	+25.87	+0.62%	14	230,034	3.1%	222.4	5.0%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	36,585	0.5%	89.6	2.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,806,193	38.1%	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
RUPALIBANK	29.9	+9.9%	31.7	26.6x	0.8x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOE	35.9	+7.8%	395.1	NM	9.1x
MIRACLEIND	33.4	+9.9%	8.7	NM	1.1x	BATBC	74,086	4.2%	15.4x	6.2x	SONALIPAPR	666.6	+7.5%	225.7	71.3x	3.9x
CRYSTALINS	60.2	+9.9%	109.8	18.5x	2.4x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	183.5	-2.4%	214.4	26.6x	10.6x
IMAMBUTTON	111.9	+8.6%	24.3	NM	23.3x	RENATA	68,042	3.9%	38.0x	4.6x	EMERALDOIL	160.6	+5.0%	166.4	NM	NM
CAPMIBBLMF	11.9	+8.2%	3.9	NM	1.3x	BXPHARMA	45,564	2.6%	14.6x	1.5x	LHBL	69.2	+1.5%	130.7	13.6x	4.1x
MIDLANDBNK	13.7	+7.9%	46.4	11.4x	1.1x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RUPALILIFE	114.0	+3.1%	124.6	NM	NM
FUWANGFOOD	35.9	+7.8%	395.1	NM	9x	GP	38,700	2.2%	11.9x	7.3x	CRYSTALINS	60.2	+9.9%	109.8	18.5x	2.4x
SONALIPAPR	666.6	+7.5%	225.7	71.3x	3.9x	BRACBANK	30,964	1.8%	8.3x	0.9x	MEGHNALIFE	73.6	+2.9%	79.7	NM	NM
NORTHRNINS	45.9	+7.5%	1.3	24.8x	1.9x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	KBPPWBIL	26.6	+1.1%	76.9	NM	2.2x
CONTININS	47.4	+7.0%	64.2	79.0x	2.2x	LHBL	28,936	1.7%	13.6x	4.1x	AIL	89.3	+1.1%	74.6	55.8x	4.0x

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)
JUTESPINN	340.7	-4.2%	1.0	NM	NM	PUBALIBANK	18,880	1.1%	4.7x	0.6x	SONALIPAPR	641.0	620.0	7.0	155	97.92
MEGHNAPET	37.6	-2.6%	5.0	NM	NM	CITYBANK	18,235	1.0%	5.5x	0.7x	UCB	12.0	11.2	15.0	5,568	66.01
SEAPEARL	183.5	-2.4%	214.4	26.6x	10.6x	OLYMPIC	16,995	1.0%	18.0x	3.0x	SANDHANINS	28.0	28.0	1.0	2,000	56.00
GEMINISEA	702.8	-2.2%	65.6	33.5x	27.7x	ROBI	15,714	0.9%	69.8x	2.5x	PRAGATILIF	135.0	135.0	5.0	300	40.50
NORTHERN	220.2	-2.2%	1.4	NM	2.7x	ALARABANK	14,417	0.8%	15.8x	1.1x	GP	261.6	261.6	11.0	120	31.26
LEGACYFOOT	116.5	-1.9%	61.2	NM	13.0x	BSRMLTD	14,210	0.8%	NM	0.7x	CNATEX	10.0	9.2	20.0	2,288	21.64
MEGCONMILK	29.8	-1.3%	1.7	20.1x	NM	PRIMEBANK	13,629	0.8%	5.3x	0.7x	AIL	88.0	88.0	1.0	227	19.98
ARAMIT	285.4	-1.2%	11.8	48.1x	2.0x	SEAPEARL	13,553	0.8%	26.6x	10.6x	BSRMLTD	90.0	90.0	1.0	222	19.94
BDAUTOCA	135.5	-1.1%	4.0	NM	18.7x	UPGDCL	13,547	0.8%	16.7x	4.4x	EBL	28.2	27.5	4.0	650	17.97
SHAHJABANK	18.3	-1.1%	3.1	5.4x	0.9x						EMERALDOIL	155.0	148.0	4.0	99	15.17

\* 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
SONALIPAPR	641.0	620.0	97.9	155	7
UCB	12.0	11.2	66.0	5,568	15
SANDHANINS	28.0	28.0	56.0	2,000	1
PRAGATILIF	135.0	135.0	40.5	300	5
GP	261.6	261.6	31.3	120	11
CNATEX	10.0	9.2	21.6	2,288	20
AIL	88.0	88.0	20.0	227	1
BSRMLTD	90.0	90.0	19.9	222	1
EBL	28.2	27.5	18.0	650	4
EMERALDOIL	155.0	148.0	15.2	99	4
SIMTEX	26.3	24.0	14.1	550	2
DBH	51.1	51.1	12.8	250	5
AL-HAJTEX	189.8	160.0	10.2	61	7
ROBI	28.0	27.0	9.6	354	10
PURABIGEN	27.9	27.9	5.6	200	3
SEAPEARL	177.0	177.0	4.4	25	2
LRBDL	32.5	31.6	4.3	134	6
BATBC	479.8	479.8	3.4	7	4
JAMUNABANK	22.9	20.0	3.4	153	4
ALIF	13.3	12.0	3.3	267	5
SINOBANGLA	76.0	76.0	3.0	40	1
SPCERAMICS	43.5	40.5	2.9	68	2
<b>Total</b>			<b>512.3</b>		<b>185</b>

#### 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
SEMLIBBSF		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
SEMLFBSLGF		0.0%	1%	Record Date	04-Sep-23
TRUSTB1MF		0.0%	5%	Record Date	04-Sep-23
EBL1STMF		0.0%	0%	Record Date	04-Sep-23

#### Important DSE News

##### HWAWELLTEX

The company has informed that the Board of Directors of the Company has decided to invest BDT 12,50,00,000.00 (10% of total paid-up capital) for the proposed Digital Bank namely "Open Digital Bank PLC" as a sponsor shareholder subject to the approval of regulatory authorities.

##### SBACBANK

The Company has informed that Mr. Abu Zafar Mohammad Shofiuddin has been elected as the Chairman of the Board of Directors of the Company in place of Mr. Abdul Kadir Molla with effect from August 16, 2023.

##### MIRACLEIND

The company has informed that as decided/confirmed in 161st Meeting of the Board of Directors of Miracle Industries Limited (MIL) on 14 and 20 (adjourned) August 2023 with the transfer of their entire free shares in MIL at 30,22,900 shares to Mehmood Equities Limited (MEL), MIL's Managing Director, Mr. Rafiqul Murshed; MIL's CEO, Dr. Latifa Binte Lutfar; Mr. Wahiduzzaman Chowdhury, Director; and Mr. Asadur Rahman Mirza, Director resigned from their respective positions. In their vacant positions, MEL nominated Dr. AKM Sahabub Alam as Director/Managing Director; Mr. Showkat Mehmood as Director; and Mr. Nayan Mehmood as Director in MIL. The Board also appointed Mr. Omar Faruk FCMA as the Company Secretary of MIL in place of Mr. Dewan Jahidul Islam. The Board decided that MIL, which was not in production since 1 July 2022, would re-commence production within 30 September 2023; and necessary investment therefore would be made by MEL.

##### DHAKABANK

Mr. A.T.M. Hayatuzzaman Khan, one of the Sponsors of the Company, has expressed his intention to buy 6,48,746 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

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