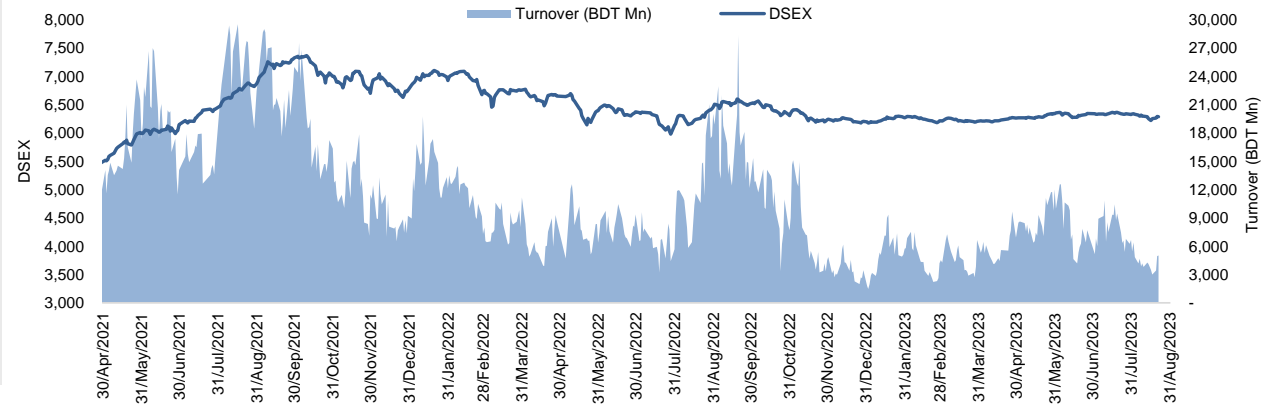


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.05%) lost 3.31 points and closed at 6,288.52. The blue-chip index DS30 (-0.04%), the Shariah-based index DSES (-0.11%), and the large-cap index CDSET (-0.04%) closed at 2,135.76, 1,365.12, and 1,210.78 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.04% followed by NBF1 (+0.03%), Food & Allied (+0.02%). Pharmaceutical experienced the highest loss of 0.17% followed by Fuel & Power (-0.09%), Engineering (-0.08%). Block trades contributed 10.7% of the overall market turnover. Fu Wang Food Ltd. (-0.8%) was the most traded share with a turnover of BDT 458 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,288.52	6,291.83	-3.31	-0.05%	+1.3%
DS30	2,135.76	2,136.65	-0.90	-0.04%	-2.7%
DSES	1,365.12	1,366.66	-1.54	-0.11%	+0.5%
CDSET	1,210.78	1,211.22	-0.44	-0.04%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	56	108	160	324
A Category (Equity)	33	64	114	211
B Category (Equity)	19	36	37	92
N Category (Equity)	2	1	1	4
Z Category (Equity)	2	7	8	17
Mutual Funds	1	1	14	16
Corporate Bonds	0	0	2	2
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,756,117	7,758,304	
	Mn USD	70,832	70,852	-0.0%
Turnover	Mn BDT	5,032	4,957	+1.5%
	Mn USD	46	45	
Volume	Mn Shares	98	110	-10.5%
No. of Trade		125,098	124,337	+0.6%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 22, 2023

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Figure: Sectorial Turnover (BDT Mn)

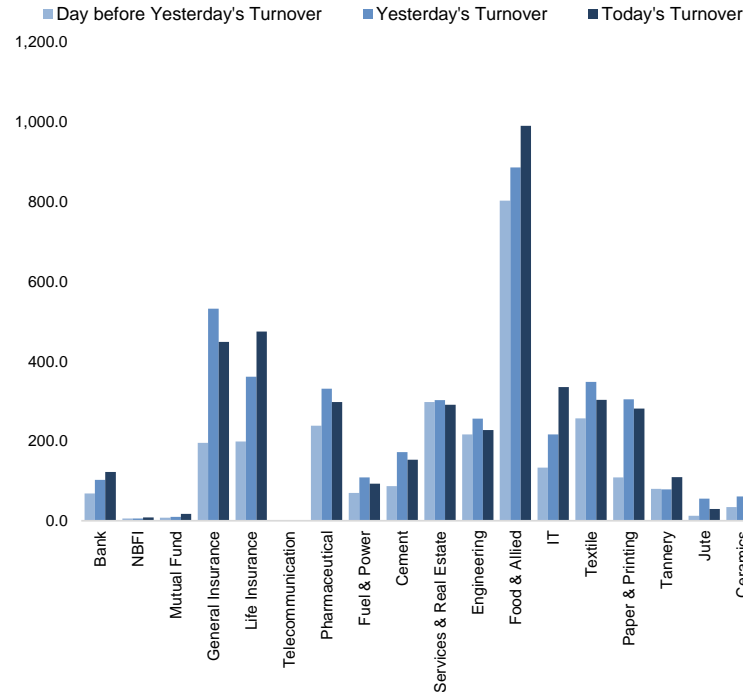
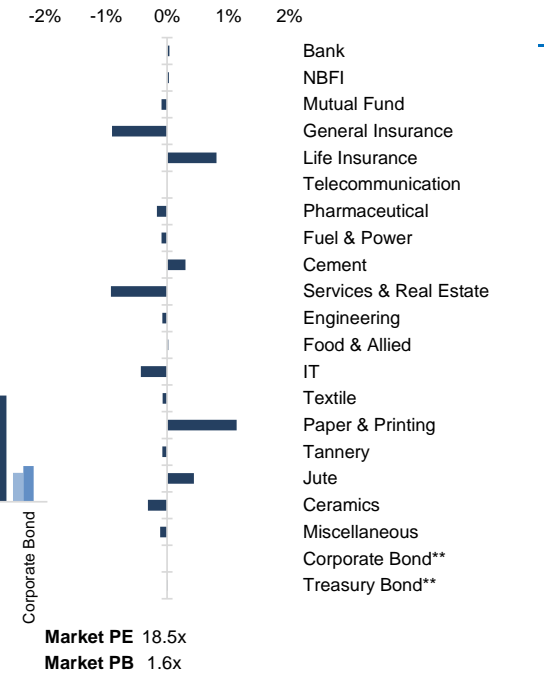


Figure: Sectorial Mcap Change



* 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	1,453	1,453	+0.53	+0.04%	35	685,138	9.3%	122.4	2.7%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,920	1,919	+0.53	+0.03%	23	186,819	2.5%	8.5	0.2%	NM	5.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	829	-0.75	-0.09%	37	37,435	0.5%	17.0	0.4%	NM	0.7x	BATBC	280,098	6.2%	1.3	15.4x	6.2x
General Insurance	3,478	3,509	-31.61	-0.90%	42	101,495	1.4%	448.4	10.0%	18.8x	1.6x	SQURPHARMA	186,155	4.1%	33.8	9.9x	1.7x
Life Insurance	2,704	2,683	+21.69	+0.81%	15	75,588	1.0%	474.7	10.6%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.2	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,726	3,732	-6.29	-0.17%	34	722,815	9.8%	298.1	6.6%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,703	-1.55	-0.09%	23	448,864	6.1%	93.1	2.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,574	2,566	+7.67	+0.30%	7	123,636	1.7%	152.9	3.4%	27.3x	2.7x	BERGERPBL	86,319	1.9%	5.9	28.2x	6.2x
Services & Real Esta	1,807	1,824	-16.78	-0.92%	8	71,402	1.0%	291.0	6.5%	24.3x	0.9x	MARICO	81,509	1.8%	7.7	19.5x	16.6x
Engineering	4,491	4,494	-3.44	-0.08%	42	527,105	7.2%	227.4	5.1%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,589	21,585	+4.26	+0.02%	21	399,482	5.4%	990.2	22.0%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,052	3,065	-13.08	-0.43%	11	39,785	0.5%	335.0	7.5%	28.1x	2.9x	BRACBANK	57,596	1.3%	0.2	8.3x	0.9x
Textile	1,630	1,631	-1.21	-0.07%	58	170,638	2.3%	303.3	6.8%	79.5x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,847	10,726	+121.73	+1.13%	6	41,794	0.6%	281.3	6.3%	40.3x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,227	3,229	-2.53	-0.08%	6	34,081	0.5%	109.5	2.4%	46.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.6	7.9x	1.0x
Jute	16,342	16,271	+71.08	+0.44%	3	3,998	0.1%	29.5	0.7%	NM	-1387.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	681	683	-2.13	-0.31%	5	31,476	0.4%	43.5	1.0%	53.4x	1.9x	UNILEVERCL	39,562	0.9%	2.3	45.8x	22.5x
Miscellaneous	4,220	4,225	-4.72	-0.11%	14	229,777	3.1%	266.0	5.9%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	36,585	0.5%	0.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.01	+0.01%	232	2,806,470	38.2%	0.5	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
MIRACLEIND	36.7	+9.9%	50.5	NM	1.2x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOI	35.6	-0.8%	457.5	NM	9.0x
LEGACYFOOT	123.3	+5.8%	101.2	NM	13.8x	BATBC	74,086	4.2%	15.4x	6.2x	RUPALILIFE	118.7	+4.1%	254.9	NM	NM
JUTESPINN	360.4	+5.8%	1.3	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	SONALIPAPR	684.2	+2.6%	209.0	73.2x	4.0x
GEMINISEA	741.2	+5.5%	166.5	35.3x	29.2x	RENATA	68,042	3.9%	38.0x	4.6x	SEAPEARL	179.5	-2.2%	197.3	26.0x	10.4x
ARAMITCEM	23.9	+4.8%	2.9	NM	24.6x	BXPHARMA	45,564	2.6%	14.6x	1.5x	AAMRANET	63.9	+0.6%	175.0	17.6x	1.7x
CLICL	54.5	+4.4%	13.4	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	GEMINISEA	741.2	+5.5%	166.5	35.3x	29.2x
HEIDELBCEM	276.9	+4.4%	37.3	34.8x	4x	GP	38,700	2.2%	11.9x	7.3x	EMERALDOIL	159.4	-0.7%	148.7	NM	NM
RUPALILIFE	118.7	+4.1%	254.9	NM	NM	BRACBANK	30,964	1.8%	8.3x	0.9x	LEGACYFOOT	123.3	+5.8%	101.2	NM	13.8x
PRAGATILIF	127.9	+3.6%	31.7	NM	NM	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	LHBL	68.9	-0.4%	97.1	13.6x	4.0x
AZIZPIPES	109.0	+3.6%	20.1	NM	NM	LHBL	28,936	1.7%	13.6x	4.0x	AIL	91.3	+2.2%	87.8	57.1x	4.0x
						NBL	19,116	1.1%	NM	0.8x						
						PUBALIBANK	18,880	1.1%	4.7x	0.6x						
						CITYBANK	18,235	1.0%	5.5x	0.7x						
						OLYMPIC	16,995	1.0%	18.0x	3.0x						
						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%	5.3x	0.7x						
						SEAPEARL	13,553	0.8%	26.0x	10.4x						
						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
SONALIPAPR	716.1	630.0	91.9	131	12
BATBC	489.0	479.8	83.1	173	8
RENWICKJA	728.0	728.0	76.8	105	1
MERCANBANK	13.3	12.0	33.1	2,684	11
GP	264.5	261.6	32.4	124	8
BSRMLTD	90.0	90.0	29.9	332	1
AIL	90.0	85.0	24.5	285	2
SIMTEX	26.4	26.3	20.9	795	4
INTRACO	36.5	36.5	14.6	400	1
SALVOCHEM	62.6	61.8	13.2	213	5
SEAPEARL	201.8	192.9	10.7	55	5
DHAKABANK	12.5	12.5	8.1	649	1
EMERALDOIL	157.1	145.0	5.9	39	4
UNIONINS	57.0	57.0	5.7	100	1
DGIC	34.3	34.3	4.5	130	1
SILVAPHL	19.5	19.5	4.3	223	7
ISLAMIBANK	33.7	33.7	4.2	125	1
RAHIMAFOD	245.0	245.0	4.1	17	1
BRACBANK	39.0	32.3	3.9	106	4
GEMINISEA	683.0	683.0	3.7	5	1
PRAGATILIF	125.0	123.1	3.7	30	2
WALTONHIL	998.0	983.0	3.4	3	3
Total			538.8		158

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

AAMRANET

The Board of Directors has recommended 11% Cash dividend for the year ended June 30, 2023. Date of AGM: 04.10.2023, Time: 10:00 AM, Venue: Digital Platform. Record Date: 12.09.2023. The Company has also reported EPS of Tk. 3.64, NAV per share of Tk. 38.11 and NOCFPS of Tk. 6.17 for the year ended June 30, 2023 as against Tk. 1.76 (restated), Tk. 34.95 (restated) and Tk. 8.10 (restated) respectively for the year ended June 30, 2022.

The company has informed that the Board of Directors has decided raising the Paid-up Capital through the issuance of Rights Share at a ratio of 2: 1(R) Share i.e. 1 (One) Rights Share against 2 (Two) existing shares held by an individual at an Issue Price of Tk. 30 (Taka thirty) including premium of Tk. 20 (Taka twenty) for each Rights Share, subject to approval of the Shareholders in the ensuing Annual General Meeting, Bangladesh Securities and Exchange Commission (BSEC) : and complying with the requirements embodied in relevant laws and Regulatory Authorities concerned. The purpose of the Rights Issue is for BMRE (Networking system upgradation, network coverage expansion), loan repayment etc. The company has also informed that the shareholders will be notified of the separate record date for the Rights Share entitlement after approval from BSEC.

QUEENSOUTH

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.

JMISMDL

The company has informed that the Board of Directors of the company resolved appointment of Mr. Hiroshi Saito, Director Finance of JMI Syringes & Medical Devices Limited as Nominee Director on behalf of Nipro Corporation, Osaka, Japan instead of Mr. Katsuhiko Fujii. The Board further resolved the interim appointment of Mr. Hiroshi Saito as new Nominee Director of the Company shall be placed to the shareholders in the forthcoming AGM for taking necessary approval.

NATLIFEINS

Mr. Md. Shahidul Islam Chowdhury, one of the Directors of the Company, has expressed his intention to buy 300 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.