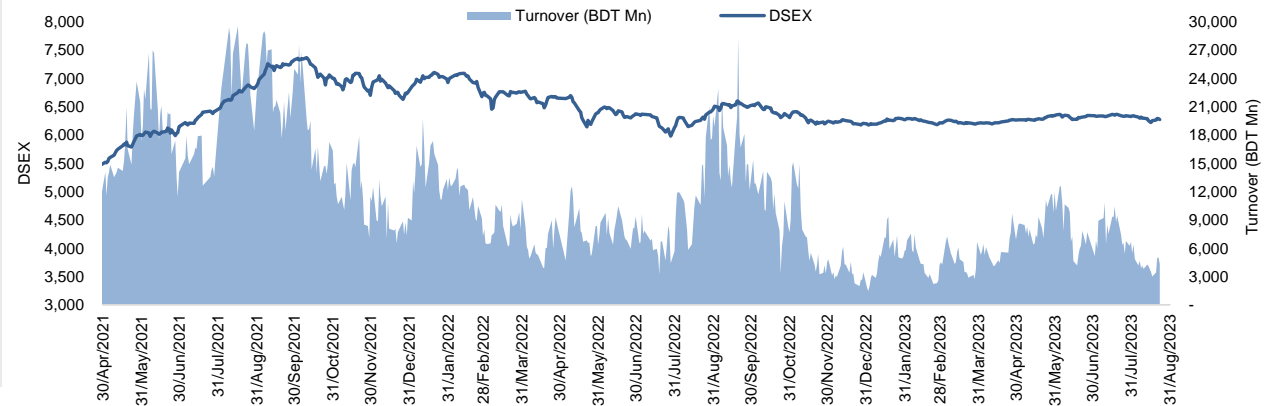


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 12.76 points and closed at 6,275.75. The blue-chip index DS30 (-0.25%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (+0.02%) closed at 2,130.42, 1,363.30, and 1,211.03 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.11% followed by Fuel & Power (-0.08%), Pharmaceutical (-0.08%), Bank (-0.08%), Engineering (-0.06%), NBFI (-0.04%), and Telecommunication (0.00%), respectively. Block trades contributed 8.6% of the overall market turnover. Fu Wang Food Ltd. (-1.7%) was the most traded share with a turnover of BDT 363 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 6,275.75 | 6,288.52 | -12.76  | -0.20% | +1.1%  |
| DS30  | 2,130.42 | 2,135.76 | -5.34   | -0.25% | -3.0%  |
| DSES  | 1,363.30 | 1,365.12 | -1.82   | -0.13% | +0.3%  |
| CDSET | 1,211.03 | 1,210.78 | +0.25   | +0.02% | -0.3%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 32       | 127      | 175       | 334   |
| A Category (Equity) | 21       | 75       | 118       | 214   |
| B Category (Equity) | 9        | 45       | 42        | 96    |
| N Category (Equity) | 0        | 1        | 3         | 4     |
| Z Category (Equity) | 2        | 6        | 12        | 20    |
| Mutual Funds        | 0        | 2        | 25        | 27    |
| Corporate Bonds     | 0        | 0        | 1         | 1     |
| Treasury Bonds      | 0        | 0        | 0         | 0     |

\* Based on Traded Scripts

|              |           | Today     | Last Day  | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap         | Mn BDT    | 7,748,476 | 7,756,117 |          |
|              | Mn USD    | 70,762    | 70,832    | -0.1%    |
| Turnover     | Mn BDT    | 4,337     | 5,032     | -13.8%   |
|              | Mn USD    | 40        | 46        |          |
| Volume       | Mn Shares | 87        | 98        | -11.9%   |
|              |           |           |           |          |
| No. of Trade |           | 114,219   | 125,098   | -8.7%    |

\* Average Interbank Exchange Rate is BDT 109.50 as of Aug 23, 2023

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Figure: Sectorial Turnover (BDT Mn)

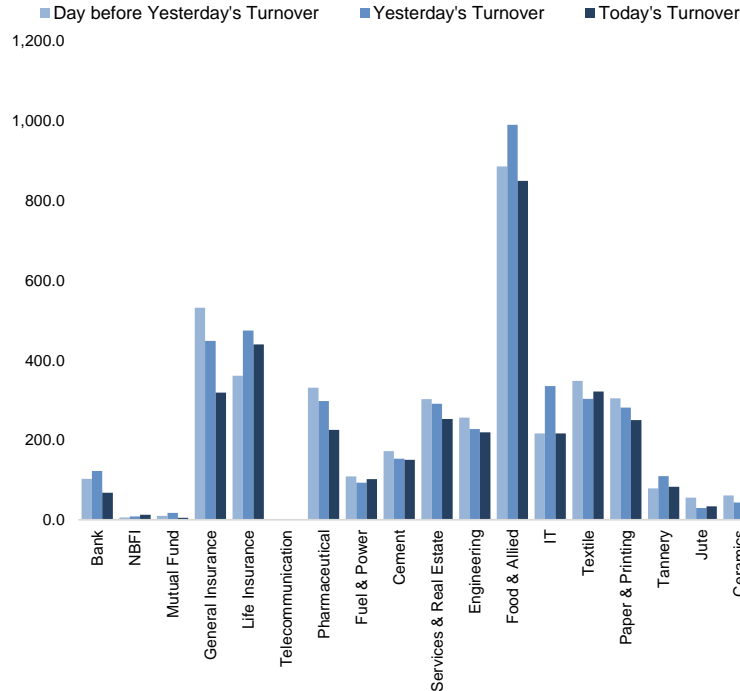
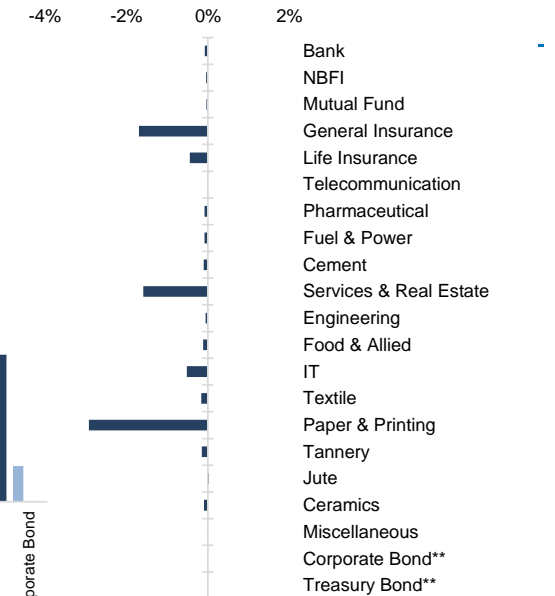


Figure: Sectorial Mcap Change



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                 | 1,452   | 1,453   | -1.12    | -0.08% | 35               | 684,609       | 9.3%            | 67.9              | 1.7%                | 12.1x | 0.7x     | GP                    | 386,996       | 8.5%            | 0.9               | 11.9x | 7.3x  |
| NBFI                 | 1,919   | 1,920   | -0.83    | -0.04% | 23               | 186,739       | 2.5%            | 12.5              | 0.3%                | NM    | 5.8x     | WALTONHIL             | 317,378       | 7.0%            | 0.0               | 49.1x | 3.2x  |
| Mutual Fund          | 828     | 828     | -0.28    | -0.03% | 37               | 37,423        | 0.5%            | 5.0               | 0.1%                | NM    | 0.7x     | BATBC                 | 280,098       | 6.2%            | 0.2               | 15.4x | 6.2x  |
| General Insurance    | 3,419   | 3,478   | -58.69   | -1.69% | 42               | 99,782        | 1.4%            | 319.0             | 8.1%                | 18.5x | 1.6x     | SQURPHARMA            | 186,687       | 4.1%            | 31.2              | 9.9x  | 1.7x  |
| Life Insurance       | 2,692   | 2,704   | -11.95   | -0.44% | 15               | 75,254        | 1.0%            | 439.7             | 11.1%               | NM    | NM       | ROBI                  | 157,138       | 3.5%            | 0.3               | 69.8x | 2.5x  |
| Telecommunication    | 4,946   | 4,946   | -        | -      | 3                | 580,232       | 7.9%            | 1.5               | 0.0%                | 15.5x | 4.5x     | RENATA                | 139,689       | 3.1%            | 0.0               | 38.0x | 4.6x  |
| Pharmaceutical       | 3,723   | 3,726   | -3.00    | -0.08% | 34               | 722,234       | 9.8%            | 225.7             | 5.7%                | 19.3x | 2.3x     | UPGDCL                | 135,475       | 3.0%            | 0.0               | 16.7x | 4.4x  |
| Fuel & Power         | 1,700   | 1,702   | -1.40    | -0.08% | 23               | 448,494       | 6.1%            | 102.0             | 2.6%                | 23.6x | 1.1x     | BEXIMCO               | 103,571       | 2.3%            | 0.0               | 12.0x | 1.2x  |
| Cement               | 2,572   | 2,574   | -2.55    | -0.10% | 7                | 123,513       | 1.7%            | 150.3             | 3.8%                | 27.2x | 2.7x     | BERGERPBL             | 86,499        | 1.9%            | 5.0               | 28.3x | 6.2x  |
| Services & Real Esta | 1,779   | 1,807   | -28.62   | -1.58% | 8                | 70,272        | 1.0%            | 252.4             | 6.4%                | 23.9x | 0.9x     | MARICO                | 81,538        | 1.8%            | 10.2              | 19.5x | 16.6x |
| Engineering          | 4,489   | 4,491   | -2.52    | -0.06% | 42               | 526,809       | 7.2%            | 219.4             | 5.5%                | 68.9x | 1.8x     | ICB                   | 74,119        | 1.6%            | 0.0               | NM    | 1.7x  |
| Food & Allied        | 21,565  | 21,589  | -24.14   | -0.11% | 21               | 399,035       | 5.4%            | 849.7             | 21.4%               | 20.1x | 7.6x     | BXPHARMA              | 65,222        | 1.4%            | 0.6               | 14.6x | 1.5x  |
| IT                   | 3,036   | 3,052   | -15.80   | -0.52% | 11               | 39,579        | 0.5%            | 216.6             | 5.5%                | 27.9x | 2.9x     | BRACBANK              | 57,596        | 1.3%            | 0.0               | 8.3x  | 0.9x  |
| Textile              | 1,627   | 1,630   | -2.69    | -0.17% | 58               | 170,356       | 2.3%            | 321.5             | 8.1%                | 79.4x | 1.2x     | BEACONPHAR            | 56,595        | 1.2%            | 0.2               | 80.9x | 9.2x  |
| Paper & Printing     | 10,531  | 10,847  | -316.71  | -2.92% | 6                | 40,574        | 0.6%            | 250.0             | 6.3%                | 39.1x | 2.0x     | ISLAMIBANK            | 52,486        | 1.2%            | 0.0               | 8.4x  | 0.7x  |
| Tannery              | 3,222   | 3,227   | -4.87    | -0.15% | 6                | 34,029        | 0.5%            | 83.1              | 2.1%                | 46.5x | 3.2x     | DUTCHBANGL            | 44,203        | 1.0%            | 0.0               | 7.9x  | 1.0x  |
| Jute                 | 16,347  | 16,342  | +4.62    | +0.03% | 3                | 3,999         | 0.1%            | 33.7              | 0.8%                | NM    | -1388.2x | TITASGAS              | 40,459        | 0.9%            | 0.0               | 32.0x | 0.6x  |
| Ceramics             | 680     | 681     | -0.65    | -0.10% | 5                | 31,446        | 0.4%            | 43.5              | 1.1%                | 53.4x | 1.9x     | UNILEVERCL            | 39,470        | 0.9%            | 1.6               | 45.6x | 22.4x |
| Miscellaneous        | 4,219   | 4,220   | -0.91    | -0.02% | 14               | 229,727       | 3.1%            | 368.7             | 9.3%                | 16.2x | 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      | -0.01    | -0.01% | 232              | 2,806,296     | 38.2%           | 0.0               | 0.0%                | NM    | NM       |                       |               |                 |                   |       |       |

| Top Ten Gainers | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB    |
|-----------------|-------------------|-------|-------------------|-------|-------|
| ARAMITCEM       | 26.2              | +9.6% | 13.8              | NM    | 27.0x |
| MIRACLEIND      | 40.2              | +9.5% | 142.8             | NM    | 1.3x  |
| SINOBANGLA      | 73.7              | +4.8% | 79.4              | 40.3x | 2.7x  |
| YPL             | 26.0              | +4.4% | 58.8              | NM    | 4.9x  |
| DAFODILCOM      | 72.4              | +2.8% | 14.9              | NM    | 5.3x  |
| INTECH          | 25.4              | +2.4% | 5.1               | NM    | 22.5x |
| SKTRIMS         | 26.7              | +1.9% | 7.2               | 23.6x | 2x    |
| BEACHHATCH      | 45.3              | +1.3% | 36.9              | 43.6x | 4.3x  |
| APEXFOODS       | 419.2             | +1.3% | 48.3              | 42.2x | 3.3x  |
| MONNOAGML       | 789.8             | +1.2% | 20.6              | NM    | 4.5x  |

| Top Ten Losers | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB   |
|----------------|-------------------|-------|-------------------|-------|------|
| OAL            | 11.2              | -5.1% | 19.7              | NM    | 0.9x |
| SIMTEX         | 24.5              | -5.0% | 51.5              | 26.9x | 1x   |
| OIMEX          | 19.1              | -5.0% | 7.6               | NM    | 1.7x |
| CONTININS      | 43.7              | -4.8% | 49.2              | 72.8x | 2.0x |
| INTRACO        | 35.6              | -4.6% | 61.4              | 23.7x | 2.8x |
| LIBRAINFU      | 790.0             | -4.3% | 9.3               | NM    | 0.6x |
| WMSHIPYARD     | 11.6              | -4.1% | 24.3              | NM    | 0.6x |
| AZIZPIPES      | 104.6             | -4.0% | 11.2              | NM    | NM   |
| EIL            | 29.3              | -3.9% | 14.8              | 23.4x | 1.6x |
| PEOPLESINS     | 36.7              | -3.9% | 13.4              | 14.4x | 1.1x |

| 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%                       | 13.6x | 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%                       | 15.8x | 1.1x  |
| BSRMLTD                    | 14,210                   | 0.8%                       | NM    | 0.7x  |
| PRIMEBANK                  | 13,629                   | 0.8%                       | 5.3x  | 0.7x  |
| SEAPEARL                   | 13,553                   | 0.8%                       | 25.4x | 10.1x |
| 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    |
|-------------------|-------------------|-------|-------------------|-------|-------|
| FUWANGFOOI        | 35.0              | -1.7% | 363.2             | NM    | 8.8x  |
| SONALIPAPR        | 658.7             | -3.7% | 195.2             | 70.4x | 3.8x  |
| SEAPEARL          | 175.2             | -2.4% | 183.0             | 25.4x | 10.1x |
| RUPALILIFE        | 118.7             | -     | 181.1             | NM    | NM    |
| MIRACLEIND        | 40.2              | +9.5% | 142.8             | NM    | 1.3x  |
| EMERALDOIL        | 159.0             | -0.3% | 118.2             | NM    | NM    |
| AIL               | 91.7              | +0.4% | 107.6             | 57.3x | 4.1x  |
| GEMINISEA         | 716.5             | -3.3% | 93.3              | 34.2x | 28.2x |
| LHBL              | 68.9              | -     | 90.2              | 13.6x | 4.0x  |
| RDFOOD            | 47.2              | -2.9% | 83.8              | 38.4x | 2.9x  |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| EGEN        | 40.7                | 40.7                | 5.0          | 1,180           | 48.03             |
| SONALIPAPR  | 708.0               | 635.0               | 10.0         | 61              | 40.78             |
| BATBC       | 500.1               | 479.8               | 17.0         | 71              | 34.13             |
| CONTININS   | 46.3                | 45.0                | 4.0          | 614             | 27.68             |
| SEAPEARL    | 172.1               | 163.0               | 4.0          | 117             | 19.65             |
| EMERALDOIL  | 154.0               | 143.5               | 3.0          | 123             | 18.00             |
| CRYSTALINS  | 60.7                | 60.0                | 2.0          | 266             | 16.03             |
| EBL         | 29.4                | 29.4                | 1.0          | 500             | 14.70             |
| INTRACO     | 40.9                | 40.9                | 1.0          | 357             | 14.60             |
| ROBI        | 29.0                | 27.0                | 5.0          | 344             | 9.79              |

| Block Trade  | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| EGEN         | 40.7                | 40.7                | 48.0              | 1,180           | 5            |
| SONALIPAPR   | 708.0               | 635.0               | 40.8              | 61              | 10           |
| BATBC        | 500.1               | 479.8               | 34.1              | 71              | 17           |
| CONTININS    | 46.3                | 45.0                | 27.7              | 614             | 4            |
| SEAPEARL     | 172.1               | 163.0               | 19.6              | 117             | 4            |
| EMERALDOIL   | 154.0               | 143.5               | 18.0              | 123             | 3            |
| CRYSTALINS   | 60.7                | 60.0                | 16.0              | 266             | 2            |
| EBL          | 29.4                | 29.4                | 14.7              | 500             | 1            |
| INTRACO      | 40.9                | 40.9                | 14.6              | 357             | 1            |
| ROBI         | 29.0                | 27.0                | 9.8               | 344             | 5            |
| BEACONPHAR   | 230.1               | 230.1               | 9.0               | 39              | 1            |
| UPGDCL       | 215.0               | 215.0               | 7.5               | 35              | 2            |
| ISLAMICFIN   | 19.7                | 19.7                | 7.3               | 372             | 1            |
| CITYBANK     | 19.5                | 19.3                | 6.7               | 345             | 4            |
| SALAMCRST    | 33.3                | 33.3                | 6.7               | 200             | 2            |
| BSCCL        | 218.2               | 199.8               | 6.6               | 30              | 2            |
| BXPHERMA     | 131.6               | 131.6               | 6.6               | 50              | 11           |
| GSPFINANCE   | 27.3                | 27.3                | 6.5               | 237             | 2            |
| FORTUNE      | 68.2                | 68.2                | 6.1               | 89              | 3            |
| UNIONINS     | 57.0                | 57.0                | 5.7               | 100             | 1            |
| IBP          | 15.3                | 15.3                | 4.5               | 294             | 1            |
| SALVOCHEM    | 62.9                | 62.9                | 3.9               | 62              | 1            |
| <b>Total</b> |                     |                     | <b>374.7</b>      |                 | <b>150</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 |
| 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

##### EXIMBANK

Mr. Zubayer Kabir, one of the Sponsors of the Company, has expressed his intention to sell 7,50,000 shares out of his holding of 70,32,600 shares of the company at prevailing market price (in the Public/Block Market) through Dhaka Stock Exchange Limited (DSE) within next 30 working days.