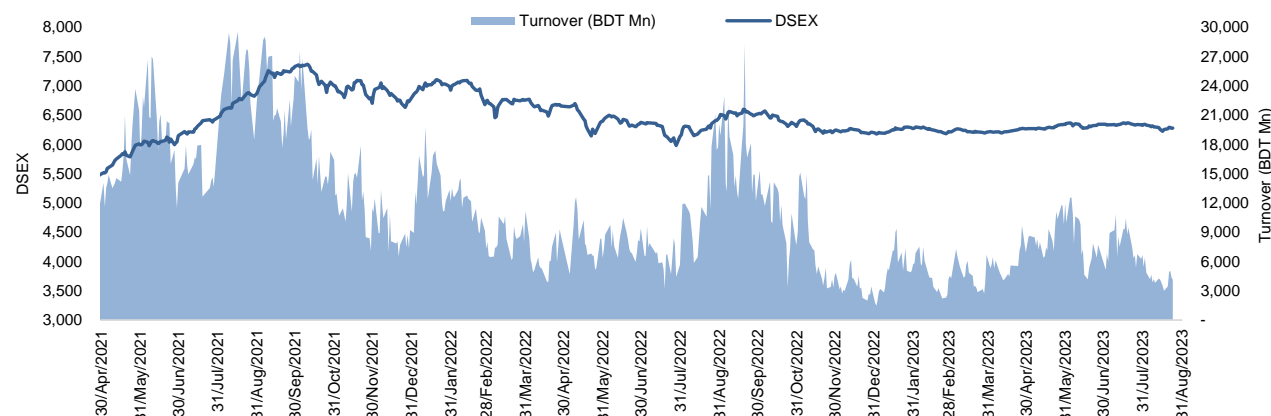


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.07%) gained 4.33 points and closed at 6,280.09. The blue-chip index DS30 (+0.00%), the Shariah-based index DSES (+0.18%), and the large-cap index CDSET (+0.12%) closed at 2,130.50, 1,365.74, and 1,212.44 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.18% followed by Engineering (+0.17%), Pharmaceutical (+0.13%), Bank (+0.09%). Food & Allied experienced the highest loss of 0.01% followed by Telecommunication (0.00%), NBFI (0.00%). Block trades contributed 12.6% of the overall market turnover. Fu Wang Food Ltd. (-5.4%) was the most traded share with a turnover of BDT 387 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,280.09	6,275.75	+4.33	+0.07%	+1.2%
DS30	2,130.50	2,130.42	+0.08	+0.00%	-3.0%
DSES	1,365.74	1,363.30	+2.44	+0.18%	+0.5%
CDSET	1,212.44	1,211.03	+1.41	+0.12%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	79	71	164	314
A Category (Equity)	49	43	108	200
B Category (Equity)	27	20	45	92
N Category (Equity)	0	2	2	4
Z Category (Equity)	3	6	9	18
Mutual Funds	3	0	17	20
Corporate Bonds	0	0	2	2
Treasury Bonds	1	0	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,752,249	7,748,476	+0.0%
	Mn USD	70,797	70,762	
Turnover	Mn BDT	4,135	4,337	-4.7%
	Mn USD	38	40	
Volume	Mn Shares	86	87	-0.9%
No. of Trade		103,239	114,219	-9.6%

\* Average Interbank Exchange Rate is BDT 109.50 as of Aug 24, 2023

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Figure: Sectorial Turnover (BDT Mn)

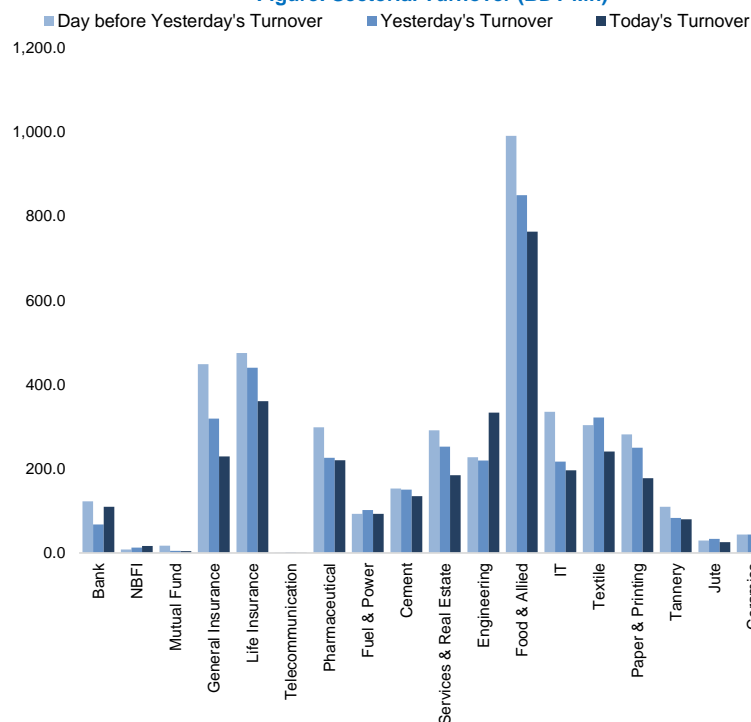
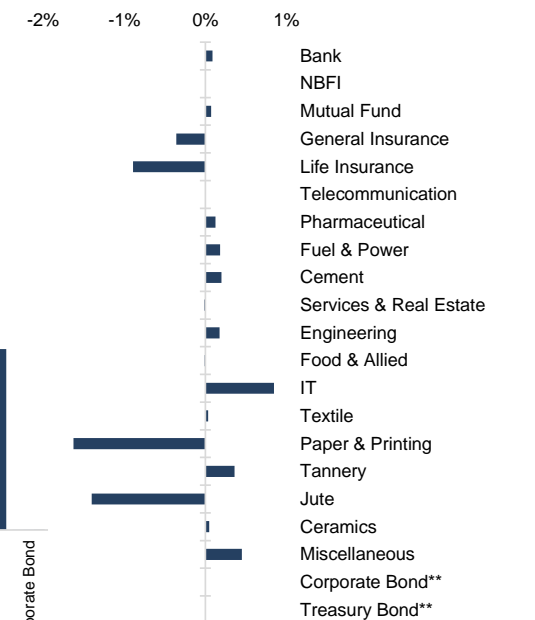


Figure: Sectorial Mcap Change



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	1,454	1,452	+1.26	+0.09%	35	685,204	9.3%	109.4	3.0%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,919	1,919	-	-	23	186,739	2.5%	16.5	0.5%	NM	5.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	828	+0.58	+0.07%	37	37,449	0.5%	4.4	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.6	15.4x	6.2x
General Insurance	3,407	3,419	-12.25	-0.36%	42	99,424	1.4%	229.1	6.3%	18.4x	1.6x	SQURPHARMA	187,218	4.1%	35.7	9.9x	1.7x
Life Insurance	2,668	2,692	-24.03	-0.89%	15	74,582	1.0%	360.3	10.0%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-0.00	-0.00%	3	580,232	7.9%	0.4	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,728	3,723	+4.67	+0.13%	34	723,139	9.8%	220.1	6.1%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,703	1,700	+3.09	+0.18%	23	449,309	6.1%	92.8	2.6%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,577	2,572	+5.14	+0.20%	7	123,760	1.7%	135.0	3.7%	27.3x	2.7x	BERGERPBL	87,158	1.9%	6.9	28.5x	6.2x
Services & Real Estate	1,778	1,779	-0.20	-0.01%	8	70,264	1.0%	184.8	5.1%	23.9x	0.9x	MARICO	81,368	1.8%	8.2	19.5x	16.6x
Engineering	4,496	4,489	+7.85	+0.17%	42	527,729	7.2%	333.0	9.2%	69.1x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,563	21,565	-2.05	-0.01%	21	398,998	5.4%	762.7	21.1%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,061	3,036	+25.65	+0.84%	11	39,913	0.5%	195.9	5.4%	28.2x	2.9x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,628	1,627	+0.55	+0.03%	58	170,414	2.3%	241.1	6.7%	79.4x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,359	10,531	-171.13	-1.63%	6	39,914	0.5%	177.5	4.9%	38.5x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,234	3,222	+11.61	+0.36%	6	34,152	0.5%	80.1	2.2%	46.7x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,117	16,347	-229.33	-1.40%	3	3,943	0.1%	25.7	0.7%	NM	-1368.7x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	+0.33	+0.05%	5	31,461	0.4%	16.8	0.5%	53.4x	1.9x	UNILEVERCL	39,626	0.9%	10.5	45.8x	22.5x
Miscellaneous	4,238	4,219	+19.05	+0.45%	14	230,765	3.1%	429.6	11.9%	16.3x	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%	0.1	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,806,324	38.2%	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
OIMEX	21.0	+9.9%	30.8	NM	1.9x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOE	33.1	-5.4%	386.9	NM	8.4x
ARAMITCEM	28.8	+9.9%	39.3	NM	29.7x	BATBC	74,086	4.2%	15.4x	6.2x	RUPALILIFE	114.7	-3.4%	227.2	NM	NM
BENGALWTL	25.7	+9.8%	37.2	52.4x	0.9x	BEXIMCO	69,196	4.0%	12.0x	1.2x	MIRACLEIND	42.7	+6.2%	163.3	NM	1.4x
SKTRIMS	29.3	+9.7%	82.0	25.9x	1.9x	RENATA	68,042	3.9%	38.0x	4.6x	SONALIPAPR	639.7	-2.9%	136.7	68.4x	3.7x
MIRACLEIND	42.7	+6.2%	163.3	NM	1.4x	BXPHARMA	45,564	2.6%	14.6x	1.5x	SEAPEARL	175.1	-0.1%	127.0	25.4x	10.1x
AGNISYS	25.9	+4.9%	29.7	21.9x	1.6x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	GEMINISEA	727.7	+1.6%	110.4	34.7x	28.7x
DESHBANDHU	25.9	+4.4%	57.9	74.0x	1x	GP	38,700	2.2%	11.9x	7.3x	YPL	27.1	+4.2%	88.4	NM	5.1x
AFTABAUTO	26.8	+4.3%	4.6	38.7x	0.5x	BRACBANK	30,964	1.8%	8.3x	0.9x	SKTRIMS	29.3	+9.7%	82.0	25.9x	1.9x
YPL	27.1	+4.2%	88.4	NM	5.1x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	EMERALDOIL	156.5	-1.6%	81.1	NM	NM
NAVANACNG	25.6	+4.1%	4.1	NM	0.8x	LHBL	28,936	1.7%	13.7x	4.1x	LHBL	69.3	+0.6%	70.1	13.7x	4.1x

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)
FUWANGFOOD	33.1	-5.4%	386.9	NM	8.4x	PUBALIBANK	18,880	1.1%	4.8x	0.7x	SEAPEARL	166.1	163.5	21.0	1,075	176.00
MERCINS	31.5	-5.4%	10.0	17.4x	1x	CITYBANK	18,235	1.0%	5.5x	0.7x	SONALIPAPR	707.8	618.0	33.0	90	56.64
JUTESPINN	344.7	-4.0%	0.3	NM	NM	OLYMPIC	16,995	1.0%	18.1x	3.0x	GP	273.1	261.6	9.0	207	55.30
PRAGATILIF	122.0	-3.9%	18.1	NM	NM	ROBI	15,714	0.9%	69.8x	2.5x	SIMTEX	26.9	24.7	9.0	1,266	32.84
RUPALILIFE	114.7	-3.4%	227.2	NM	NM	ALARABANK	14,417	0.8%	15.8x	1.1x	MERCANBANK	13.3	13.3	1.0	1,794	23.86
IMAMBUTTON	105.7	-2.9%	7.7	NM	22.0x	BSRMLTD	14,210	0.8%	NM	0.7x	DBH	51.1	51.1	7.0	370	18.91
SONALIPAPR	639.7	-2.9%	136.7	68.4x	3.7x	PRIMEBANK	13,629	0.8%	5.3x	0.7x	BATBC	479.9	479.8	17.0	35	16.91
NORTHERN	212.9	-2.7%	2.0	NM	2.6x	SEAPEARL	13,553	0.8%	25.4x	10.1x	SONALILIFE	82.0	82.0	1.0	200	16.40
MEGHNALIFE	72.9	-2.5%	24.5	NM	NM	UPGDCL	13,547	0.8%	16.7x	4.4x	LINDEBD	1,390.0	1,330.0	13.0	12	15.88
PRIMELIFE	56.8	-2.4%	3.7	NM	NM						SALVOCHEM	62.6	55.7	8.0	235	14.48

\* 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	166.1	163.5	176.0	1,075	21
SONALIPAPR	707.8	618.0	56.6	90	33
GP	273.1	261.6	55.3	207	9
SIMTEX	26.9	24.7	32.8	1,266	9
MERCANBANK	13.3	13.3	23.9	1,794	1
DBH	51.1	51.1	18.9	370	7
BATBC	479.9	479.8	16.9	35	17
SONALILIFE	82.0	82.0	16.4	200	1
LINDEBD	1,390.0	1,330.0	15.9	12	13
SALVOCHEM	62.6	55.7	14.5	235	8
CNATEX	9.5	9.5	8.6	900	1
EBL	28.2	28.0	8.4	300	3
PTL	74.0	74.0	7.3	99	1
ROBI	27.0	27.0	5.4	200	6
CITYBANK	20.0	20.0	4.0	200	1
LRBDL	31.6	31.6	3.3	105	6
RENATA	1,142.0	1,141.8	3.0	3	3
NHFIL	38.0	37.7	2.7	73	3
KBPPWBIL	26.9	26.9	2.7	100	1
NBL	8.2	8.2	2.6	315	3
BSCCL	199.8	199.8	2.5	13	4
CRYSTALINS	60.9	59.1	2.3	38	2
<b>Total</b>			<b>519.6</b>		<b>207</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
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
FBFIF		0.0%	5%	Record Date	04-Sep-23
1JANATAMF		0.0%	0%	Record Date	04-Sep-23
IFIC1STMF		0.0%	0%	Record Date	04-Sep-23
EXIM1STMF		0.0%	3%	Record Date	04-Sep-23
CAPMBDBLMF		0.0%	6%	Record Date	07-Sep-23
CAPMIBBLMF		0.0%	6%	Record Date	07-Sep-23
FAREASTFIN		0.0%	0%	Record Date	10-Sep-23
FAREASTFIN		0.0%	0%	Record Date	10-Sep-23
EBLNRBMF		0.0%	7%	Record Date	12-Sep-23
PHPMF1		0.0%	2%	Record Date	12-Sep-23

#### Important DSE News

##### PADMALIFE

**(Q2 Un-audited):** As per life revenue account of the company for April to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 35.61 million as against excess of total expenses including claims over total income (deficit) of BDT 7.76 million in the corresponding previous period of 2022. Whereas as per life revenue account of the company for January to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 94.64 million as against excess of total expenses including claims over total income (deficit) of BDT 0.68 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT (2,462.03) million as on June 30, 2023 as against BDT 123.95 million as on June 30, 2022.

##### ISLAMIINS

The company has informed that the Board of Directors has decided to invest 10% shares i.e. Tk. 12,50,00,000.00 only in the proposed Digital Bank as sponsor shareholder.

##### GREENDELT

The Company has informed that the Board of Directors has elected Mr. Abul Hasan Chowdhury as Chairman and Ms. Dilruba Chowdhury as Vice Chairperson of the company.

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