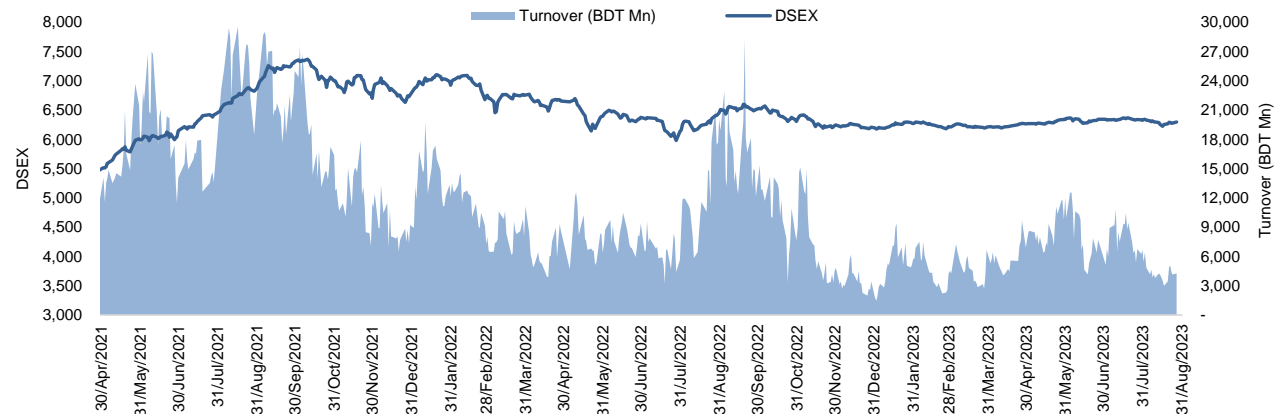


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.29%) gained 18.14 points and closed at 6,298.23. The blue-chip index DS30 (+0.45%), the Shariah-based index DSES (+0.39%), and the large-cap index CDSET (+0.01%) closed at 2,140.17, 1,371.01, and 1,212.59 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.17% followed by Food & Allied (+0.14%), Bank (+0.11%), Engineering (+0.07%), Fuel & Power (+0.04%), Telecommunication (+0.00%), and NBF (0.00%), respectively. Block trades contributed 10.1% of the overall market turnover. Fu Wang Food Ltd. (+9.7%) was the most traded share with a turnover of BDT 319 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,298.23	6,280.09	+18.14	+0.29%	+1.5%
DS30	2,140.17	2,130.50	+9.67	+0.45%	-2.5%
DSES	1,371.01	1,365.74	+5.27	+0.39%	+0.9%
CDSET	1,212.59	1,212.44	+0.15	+0.01%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	121	32	180	333
A Category (Equity)	70	22	123	215
B Category (Equity)	40	7	46	93
N Category (Equity)	2	1	2	5
Z Category (Equity)	9	2	9	20
Mutual Funds	2	0	18	20
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,763,368	7,752,249	+0.1%
	Mn USD	70,898	70,797	
Turnover	Mn BDT	4,275	4,135	+3.4%
	Mn USD	39	38	
Volume	Mn Shares	79	86	-8.5%
No. of Trade		105,628	103,239	+2.3%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 27, 2023

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Figure: Sectorial Turnover (BDT Mn)

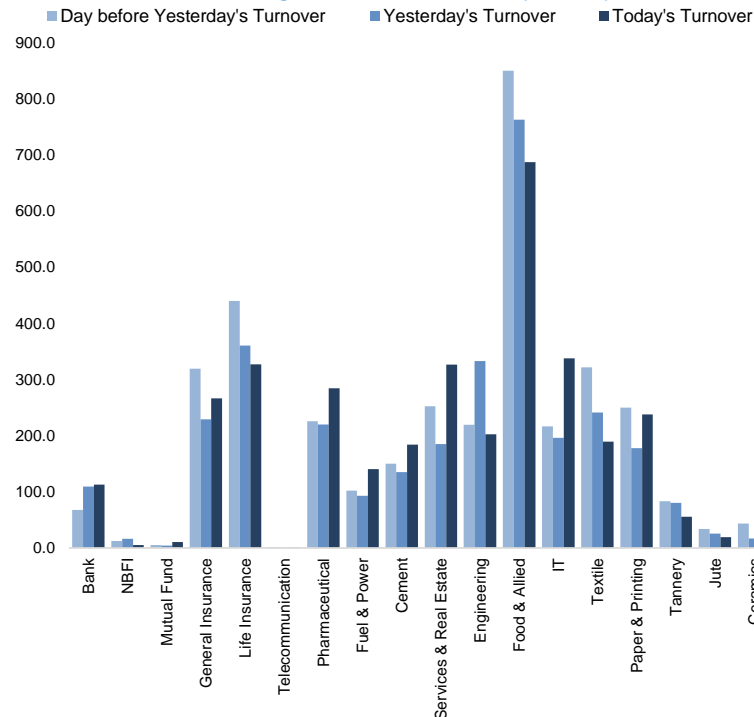
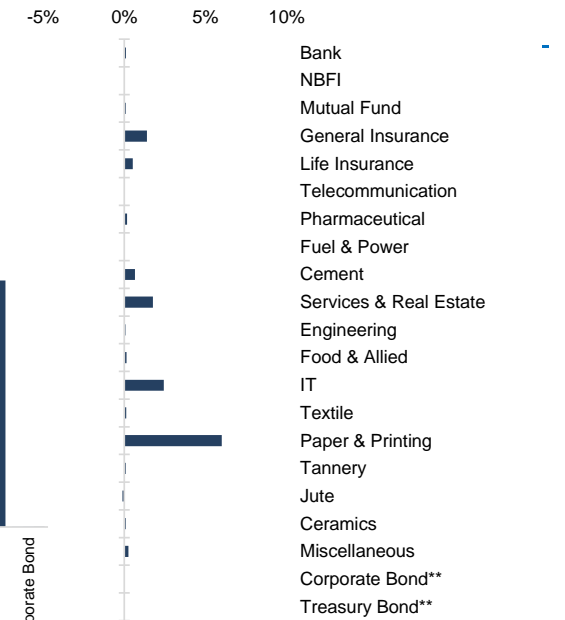


Figure: Sectorial Mcap Change



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	1,455	1,454	+1.55	+0.11%	35	685,936	9.3%	112.8	2.9%	12.1x	0.7x	GP	386,996	8.5%	0.1	11.9x	7.3x
NBFI	1,919	1,919	-	-	23	186,739	2.5%	5.2	0.1%	NM	5.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	829	828	+0.68	+0.08%	37	37,480	0.5%	10.3	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.4x	6.2x
General Insurance	3,454	3,407	+47.63	+1.40%	42	100,814	1.4%	266.4	6.9%	18.7x	1.6x	SQURPHARMA	187,218	4.1%	47.7	9.9x	1.7x
Life Insurance	2,682	2,668	+13.97	+0.52%	15	74,973	1.0%	326.8	8.5%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	+0.00	+0.00%	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	3,734	3,728	+6.35	+0.17%	34	724,370	9.8%	284.3	7.4%	19.4x	2.3x	UPGDCL	135,475	3.0%	13.9	16.7x	4.4x
Fuel & Power	1,704	1,703	+0.61	+0.04%	23	449,469	6.1%	140.4	3.7%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,594	2,577	+16.86	+0.65%	7	124,570	1.7%	184.2	4.8%	27.5x	2.7x	BERGERPBL	87,228	1.9%	5.4	28.5x	6.3x
Services & Real Estate	1,810	1,778	+31.36	+1.76%	8	71,502	1.0%	326.3	8.5%	24.3x	0.9x	MARICO	81,374	1.8%	5.9	19.5x	16.6x
Engineering	4,499	4,496	+2.94	+0.07%	42	528,074	7.2%	202.3	5.3%	69.1x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,594	21,563	+30.79	+0.14%	21	399,567	5.4%	687.0	17.9%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,136	3,061	+74.76	+2.44%	11	40,888	0.6%	337.6	8.8%	28.8x	2.9x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,630	1,628	+2.08	+0.13%	58	170,632	2.3%	189.5	4.9%	79.5x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,981	10,359	+621.77	+6.00%	6	42,310	0.6%	238.0	6.2%	40.8x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,236	3,234	+2.60	+0.08%	6	34,179	0.5%	55.4	1.4%	46.7x	3.3x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,098	16,117	-19.44	-0.12%	3	3,938	0.1%	19.2	0.5%	NM	-1367.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	681	680	+0.57	+0.08%	5	31,487	0.4%	17.8	0.5%	53.5x	1.9x	UNILEVERCL	39,792	0.9%	2.1	46.0x	22.6x
Miscellaneous	4,249	4,238	+11.02	+0.26%	14	231,365	3.1%	439.1	11.4%	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%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,806,462	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
EHL	90.9	+9.9%	120.8	13.5x	1.2x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOD	36.3	+9.7%	318.8	NM	9.2x
FUWANGFOOD	36.3	+9.7%	318.8	NM	9.2x	BATBC	74,086	4.2%	15.4x	6.2x	RUPALILIFE	116.5	+1.6%	211.8	NM	NM
BDWELDING	24.8	+9.3%	31.0	NM	2.2x	BEXIMCO	69,196	4.0%	12.0x	1.2x	BSC	117.1	+2.7%	163.7	7.5x	1.5x
SONALIPAPR	687.6	+7.5%	159.3	73.5x	4.0x	RENATA	68,042	3.9%	38.0x	4.6x	SONALIPAPR	687.6	+7.5%	159.3	73.5x	4.0x
CRYSTALINS	61.4	+7.3%	70.3	18.9x	2.5x	BXPHARMA	45,564	2.6%	14.6x	1.5x	SEAPEARL	173.8	-0.7%	159.0	25.2x	10.1x
SHURWID	14.9	+7.2%	6.0	NM	1.2x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	MIRACLEIND	43.2	+1.2%	126.2	NM	1.4x
TILIL	55.5	+5.9%	14.2	NM	NM	GP	38,700	2.2%	11.9x	7.3x	EHL	90.9	+9.9%	120.8	13.5x	1.2x
BPML	74.3	+5.8%	50.4	20.1x	1.0x	BRACBANK	30,964	1.8%	8.3x	0.9x	LHBL	70.0	+1.0%	120.8	13.8x	4.1x
ASIAPACINS	58.7	+5.4%	7.8	24.6x	2.5x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	ADNTEL	132.0	+5.1%	103.5	34.3x	4.8x
ADNTEL	132.0	+5.1%	103.5	34.3x	4.8x	LHBL	28,936	1.7%	13.8x	4.1x	JHRML	81.5	+3.7%	99.1	35.2x	2.6x

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)
GQBALLPEN	123.5	-2.4%	8.9	NM	1.0x	PUBALIBANK	18,880	1.1%	4.8x	0.7x	SONALIPAPR	687.6	640.0	49.0	432	280.89
ARAMIT	272.3	-1.8%	9.7	45.9x	2x	CITYBANK	18,235	1.0%	5.5x	0.7x	UPGDCL	233.7	219.9	14.0	86	19.84
NTC	402.6	-1.6%	2.0	NM	199.3x	OLYMPIC	16,995	1.0%	17.9x	3.0x	UNIONINS	59.0	55.9	6.0	329	18.77
APEXFOOT	288.3	-1.1%	5.4	26.2x	1.2x	ROBI	15,714	0.9%	69.8x	2.5x	SIMTEX	25.5	23.8	3.0	494	12.44
CLICL	53.9	-1.1%	12.0	NM	NM	ALARABANK	14,417	0.8%	15.8x	1.1x	AL-HAJTEX	180.0	170.1	6.0	66	11.55
AIL	90.1	-1.0%	47.6	56.3x	4.0x	BSRMLTD	14,210	0.8%	NM	0.7x	CITYBANK	21.4	20.0	3.0	344	7.32
APEXFOODS	411.5	-0.9%	28.0	41.4x	3.3x	PRIMEBANK	13,629	0.8%	5.3x	0.7x	GP	268.9	261.6	10.0	23	6.15
OLYMPIC	147.4	-0.9%	6.1	17.9x	3.0x	SEAPEARL	13,553	0.8%	25.2x	10.1x	CONTININS	48.1	43.8	2.0	130	5.82
WMSHIPYARD	11.8	-0.8%	11.9	NM	0.6x	UPGDCL	13,547	0.8%	16.7x	4.4x	SEAPEARL	171.0	166.5	2.0	30	5.02
INTECH	25.1	-0.8%	5.1	NM	22.2x						EMERALDOIL	141.1	141.1	3.0	32	4.55

* 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	687.6	640.0	280.9	432	49
UPGDCL	233.7	219.9	19.8	86	14
UNIONINS	59.0	55.9	18.8	329	6
SIMTEX	25.5	23.8	12.4	494	3
AL-HAJTEX	180.0	170.1	11.5	66	6
CITYBANK	21.4	20.0	7.3	344	3
GP	268.9	261.6	6.2	23	10
CONTININS	48.1	43.8	5.8	130	2
SEAPEARL	171.0	166.5	5.0	30	2
EMERALDOIL	141.1	141.1	4.6	32	3
INTRACO	36.0	36.0	4.3	120	1
BATBC	479.8	479.8	3.9	8	5
RENATA	1,155.0	1,141.8	2.8	2	4
LRBDL	31.7	31.6	2.5	80	5
MEGHNALIFE	79.0	79.0	2.4	30	1
SIBL	11.0	10.8	2.4	216	4
PREMIERCEM	67.6	67.2	2.4	35	2
JAMUNABANK	22.9	22.9	2.3	100	2
SAIFPOWER	29.6	26.8	2.0	71	3
LANKABAFIN	25.9	25.9	1.8	70	1
BEACONPHAR	266.4	245.0	1.8	7	2
SONALIANS	560.0	560.0	1.7	3	1
Total			432.2		172

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
POPULAR1MF		0.0%	3%	Record Date	12-Sep-23

Important DSE News

GIB

The company has informed that as per Consent of Bangladesh Bank vide its DOS Circular Letter No. 22 dated August 22, 2023, all the Banking Operations of Global Islami Bank PLC will remain temporarily suspended from September 01, 2023 to September 05, 2023; total 120 hours or 5 (Five) days for accomplishment of "Data migration" to New Core Banking Software of the bank.

ZAHINTEX

The Company has informed that the Head Office of the Company has been shifted to its new address at Vogra Bypass Mor, Bason, Gazipur City Corporation, Gazipur-1704. Address of the company's share office will remain unchanged. The company has informed that all machineries of two of its production units, Plant-2 BISCIC Joydebpur Industrial Extension area, Gazipur and Plant-4 Choydana, Board Bazar, have been transferred to Plant-01 Borkan, Manipur, Gazipur and Plant-3 Arishaprashad, Kawaltia, Gazipur due to complexity in Buyers' compliance issues.

MJLBD

The company has informed that the Board of Directors of the company has approved the following proposal: MJL has conditionally signed a MOU with seller to purchase an industrial plot of land, measuring 50 Bigha located at Mouza-Shimrail, Thana-Shiddhirganj, District-Narayanganj at a total consideration value of Tk. 95 Crore for its future expansion subject to all documents related to this property are found transparent and legitimate.

PRAGATIINS

The Company has informed that the Board of Directors has appointed Mr. Syed Sehab Ullah Al-Manjur, ACII as Chief Executive Officer of the company and the appointment was approved by Insurance Development and Regulatory Authority (IDRA).

CBLPBOND

The Trustee of City Bank Perpetual Bond has approved semi-annual coupon payment @ 10.00% for the period from September 01, 2023 to February 29, 2024.

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