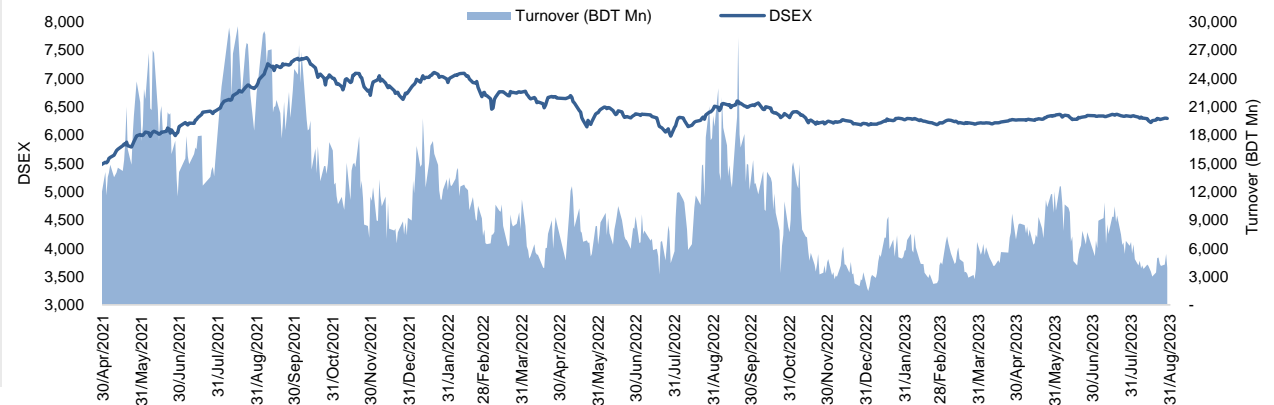


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.14%) lost 8.66 points and closed at 6,290.99. The blue-chip index DS30 (-0.24%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (-0.06%) closed at 2,138.55, 1,371.41, and 1,211.94 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.15% followed by Fuel & Power (+0.01%), Telecommunication (0.00%). Bank experienced the highest loss of 0.08% followed by Engineering (-0.07%), Pharmaceutical (-0.05%), NBFI (-0.02%). Block trades contributed 10.5% of the overall market turnover. Fu Wang Food Ltd. (+0.6%) was the most traded share with a turnover of BDT 358 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,290.99	6,299.66	-8.66	-0.14%	+1.4%
DS30	2,138.55	2,143.64	-5.09	-0.24%	-2.6%
DSES	1,371.41	1,373.17	-1.76	-0.13%	+0.9%
CDSET	1,211.94	1,212.70	-0.76	-0.06%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	33	127	160	320
A Category (Equity)	16	78	110	204
B Category (Equity)	15	37	41	93
N Category (Equity)	0	3	2	5
Z Category (Equity)	2	9	7	18
Mutual Funds	1	1	17	19
Corporate Bonds	0	0	4	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,757,810	7,762,904	-0.1%
	Mn USD	70,848	70,894	
Turnover	Mn BDT	3,915	5,401	-27.5%
	Mn USD	36	49	
Volume	Mn Shares	75	115	-34.9%
No. of Trade		102,686	134,605	-23.7%

* Average Interbank Exchange Rate is BDT 109.50 as of Aug 29, 2023

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Figure: Sectorial Turnover (BDT Mn)

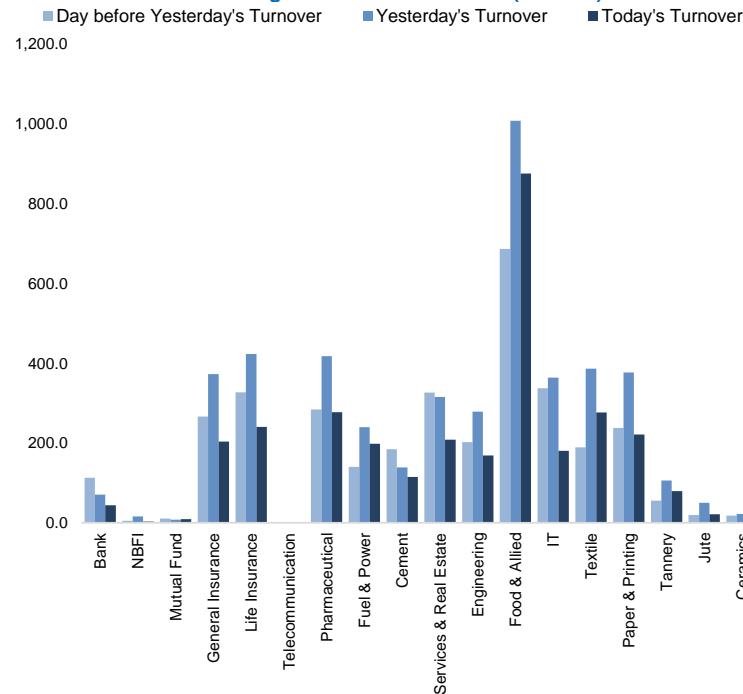
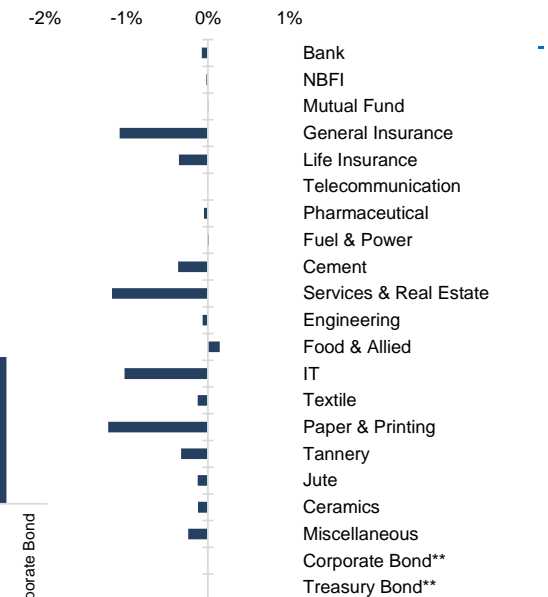


Figure: Sectorial Mcap Change



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	-1.10	-0.08%	35	684,281	9.3%	44.0	1.3%	12.1x	0.7x	GP	386,996	8.5%	1.3	11.9x	7.3x
NBFI	1,919	1,919	-0.35	-0.02%	23	186,724	2.5%	2.9	0.1%	NM	5.8x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	829	829	+0.06	+0.01%	37	37,472	0.5%	9.1	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.4x	6.2x
General Insurance	3,400	3,437	-37.17	-1.08%	42	99,240	1.3%	203.4	5.8%	18.4x	1.6x	SQURPHARMA	187,307	4.1%	23.2	9.9x	1.7x
Life Insurance	2,658	2,668	-9.45	-0.35%	15	74,301	1.0%	240.5	6.9%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	1.5	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,734	3,736	-1.73	-0.05%	34	724,355	9.8%	277.5	7.9%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,703	1,703	+0.23	+0.01%	23	449,326	6.1%	198.2	5.7%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,585	2,595	-9.48	-0.37%	7	124,180	1.7%	114.8	3.3%	27.4x	2.7x	BERGERPBL	86,592	1.9%	11.0	28.3x	6.2x
Services & Real Esta	1,808	1,830	-21.51	-1.18%	8	71,437	1.0%	208.1	5.9%	24.3x	0.9x	MARICO	81,213	1.8%	3.6	19.5x	16.5x
Engineering	4,492	4,495	-2.92	-0.07%	42	527,204	7.2%	168.9	4.8%	69.0x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,615	21,584	+31.75	+0.15%	21	399,967	5.4%	875.4	25.0%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,123	3,155	-32.20	-1.02%	11	40,713	0.6%	180.4	5.1%	28.7x	2.9x	BRACBANK	57,596	1.3%	0.3	8.3x	0.9x
Textile	1,629	1,631	-2.01	-0.12%	58	170,523	2.3%	276.6	7.9%	79.5x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	11,043	11,180	-136.53	-1.22%	6	42,548	0.6%	221.4	6.3%	41.0x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,226	3,236	-10.56	-0.33%	6	34,067	0.5%	79.2	2.3%	46.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,206	16,226	-19.90	-0.12%	3	3,964	0.1%	21.4	0.6%	NM	-1376.2x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	681	-0.82	-0.12%	5	31,450	0.4%	11.1	0.3%	53.4x	1.9x	UNILEVERCL	39,535	0.9%	1.3	45.7x	22.5x
Miscellaneous	4,232	4,243	-10.27	-0.24%	14	230,440	3.1%	368.0	10.5%	16.3x	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	+0.00	+0.00%	232	2,806,555	38.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SKTRIMS	30.8	+6.9%	81.4	27.3x	2.0x
EMERALDOIL	165.9	+5.7%	200.7	NM	NM
AMBEEPHA	670.1	+4.1%	14.4	NM	35.2x
PAPERPROC	243.1	+3.4%	54.4	49.3x	7.2x
LIBRAINFU	843.1	+3.1%	16.4	NM	0.7x
MIRACLEIND	42.0	+2.7%	101.2	NM	1.4x
MONOSPOOL	263.6	+2.5%	18.0	35.0x	5x
ADVENT	24.6	+2.5%	50.3	23.2x	1.6x
DAFODILCOM	73.3	+2.1%	6.0	NM	5.4x
GEMINISEA	778.5	+1.9%	135.8	37.1x	30.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	101.3	-4.3%	3.7	NM	NM
NORTHRNINS	42.2	-3.4%	0.0	22.8x	2x
INTECH	24.9	-2.7%	1.5	NM	22.0x
ISNLTD	47.6	-2.7%	2.8	88.1x	14.9x
PRIMELIFE	55.6	-2.6%	2.1	NM	NM
YPL	26.0	-2.6%	32.2	NM	4.9x
CONTININS	45.2	-2.6%	28.0	75.3x	2.1x
WMSHIPYARD	11.7	-2.5%	14.4	NM	0.6x
PRAGATIINS	62.6	-2.5%	5.8	12.3x	1.1x
ORIONINFU	337.9	-2.5%	46.0	NM	24.5x

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	4.3%	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	29,927	1.7%	8.4x	0.7x
LHBL	28,562	1.6%	13.8x	4.1x
PUBALIBANK	19,162	1.1%	4.8x	0.7x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	18.0x	3.0x
ROBI	15,714	0.9%	69.8x	2.5x
ALARABANK	14,357	0.8%	15.7x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
SEAPEARL	13,733	0.8%	25.4x	10.1x
UPGDCL	13,547	0.8%	16.7x	4.4x
PRIMEBANK	13,491	0.8%	5.2x	0.7x

* 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	36.2	+0.6%	358.3	NM	9.1x
EMERALDOIL	165.9	+5.7%	200.7	NM	NM
INTRACO	41.7	+1.0%	164.6	27.7x	3.2x
RUPALILIFE	111.4	-2.3%	147.3	NM	NM
GEMINISEA	778.5	+1.9%	135.8	37.1x	30.7x
SONALIPAPR	697.0	-1.6%	114.6	74.5x	4.1x
EHL	91.1	-1.7%	105.4	13.5x	1.2x
MIRACLEIND	42.0	+2.7%	101.2	NM	1.4x
KBPPWBIL	26.2	-0.4%	88.6	NM	2.2x
SKTRIMS	30.8	+6.9%	81.4	27.3x	2.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EMERALDOIL	151.0	141.3	10.0	552	78.65
SONALIPAPR	700.0	660.1	12.0	60	41.57
SIMTEX	26.3	25.5	10.0	1,171	30.42
BXPHARMA	141.4	141.4	1.0	174	24.64
GEMINISEA	795.0	762.0	4.0	31	23.87
INTRACO	45.4	44.8	2.0	522	23.46
SEAPEARL	165.0	165.0	2.0	131	21.61
SALVOCHEM	61.8	61.8	3.0	314	19.39
CRYSTALINS	62.0	54.0	5.0	237	14.41
BATBC	480.0	479.8	8.0	28	13.28

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EMERALDOIL	151.0	141.3	78.6	552	10
SONALIPAPR	700.0	660.1	41.6	60	12
SIMTEX	26.3	25.5	30.4	1,171	10
BXPHERMA	141.4	141.4	24.6	174	1
GEMINISEA	795.0	762.0	23.9	31	4
INTRACO	45.4	44.8	23.5	522	2
SEAPEARL	165.0	165.0	21.6	131	2
SALVOCHEM	61.8	61.8	19.4	314	3
CRYSTALINS	62.0	54.0	14.4	237	5
BATBC	480.0	479.8	13.3	28	8
RENATA	1,141.8	1,141.8	12.2	11	2
FINEFOODS	122.0	121.8	11.6	95	2
GP	261.6	261.6	8.5	32	9
ABBANK	8.9	8.9	6.9	770	1
IPDC	58.0	56.0	6.7	119	2
BEXIMCO	104.6	104.6	6.4	61	1
CNATEX	10.3	10.3	5.2	500	1
FORTUNE	82.7	68.8	3.9	53	4
NBL	8.2	7.5	3.3	438	2
JAMUNABANK	19.0	19.0	3.2	170	4
ALIF	12.1	12.0	2.9	242	4
DHAKABANK	11.3	11.3	2.9	254	1
Total			412.6		147

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
FBFIF		0.0%	5%	Record Date	4-Sep-23
1JANATAMF		0.0%	0%	Record Date	4-Sep-23
IFIC1STMF		0.0%	0%	Record Date	4-Sep-23
EXIM1STMF		0.0%	3%	Record Date	4-Sep-23
CAPMBDBLMF		0.0%	6%	Record Date	7-Sep-23
CAPMIBBLMF		0.0%	6%	Record Date	7-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
ABB1STMF		0.0%	5%	Record Date	12-Sep-23
AAMRANET		0.0%	11%	Record Date	12-Sep-23

Important DSE News

EIL

The Company has been placed in 'B' category from existing 'A' category with effect from today i.e., 29.08.2023 as the Company has approved 7% cash dividend for the year ended December 31, 2022.

BSCCL

The Board of Directors has recommended 51% Cash Dividend for the year ended June 30, 2023. Date of AGM: 12.10.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 20.09.2023. The Company has also reported Diluted EPS of Tk. 15.19, NAV per share of Tk. 85.05 and NOCFPS of Tk. 14.68 for the year ended June 30, 2023 as against Tk. 13.67 (restated), Tk. 64.45 (restated) and Tk. 16.76 (restated) respectively for the year ended June 30, 2022.

IBNSINA

The Board of Directors has recommended 60% Cash Dividend for the year ended June 30, 2023. Date of AGM: 22.10.2023, Time: 9:30 AM, Venue: Digital Platform. Record Date: 21.09.2023. The Company has also reported Consolidated EPS of Tk. 19.38, Consolidated NAV per share of Tk. 96.68 and Consolidated NOCFPS of Tk. 28.08 for the year ended June 30, 2023 as against Tk. 19.39, Tk. 83.36 and Tk. 13.40 respectively for the year ended June 30, 2022.

IBBL2PBOND

Alpha Credit Rating Limited (Alpha Rating) has assigned the Surveillance rating of the Company as "AA+" in the long term along with Stable outlook based on the audited financial statements as on December 31, 2022 and relevant qualitative information till August 28, 2023.

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