

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 2.15 points and closed at 6,293.14. The blue-chip index DS30 (+0.05%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (-0.04%) closed at 2,139.58, 1,371.49, and 1,211.43 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.06% followed by Food & Allied (+0.05%), NBF1 (+0.03%). Pharmaceutical experienced the highest loss of 0.15% followed by Fuel & Power (-0.08%), Bank (-0.02%). Block trades contributed 10.7% of the overall market turnover. Fu Wang Food Ltd. (+5.5%) was the most traded share with a turnover of BDT 503 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,293.14	6,290.99	+2.15	+0.03%	+1.4%
DS30	2,139.58	2,138.55	+1.03	+0.05%	-2.5%
DSES	1,371.49	1,371.41	+0.07	+0.01%	+0.9%
CDSET	1,211.43	1,211.94	-0.51	-0.04%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	73	74	156	303
A Category (Equity)	31	51	106	188
B Category (Equity)	35	17	40	92
N Category (Equity)	2	1	2	5
Z Category (Equity)	5	5	8	18
Mutual Funds	0	2	14	16
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,757,987	7,757,810	
	Mn USD	70,849	70,848	+0.0%
Turnover	Mn BDT	4,134	3,915	+5.6%
	Mn USD	38	36	
Volume	Mn Shares	91	75	+22.0%
No. of Trade		102,746	102,686	+0.1%

\* Average Interbank Exchange Rate is BDT 109.50 as of Aug 30, 2023

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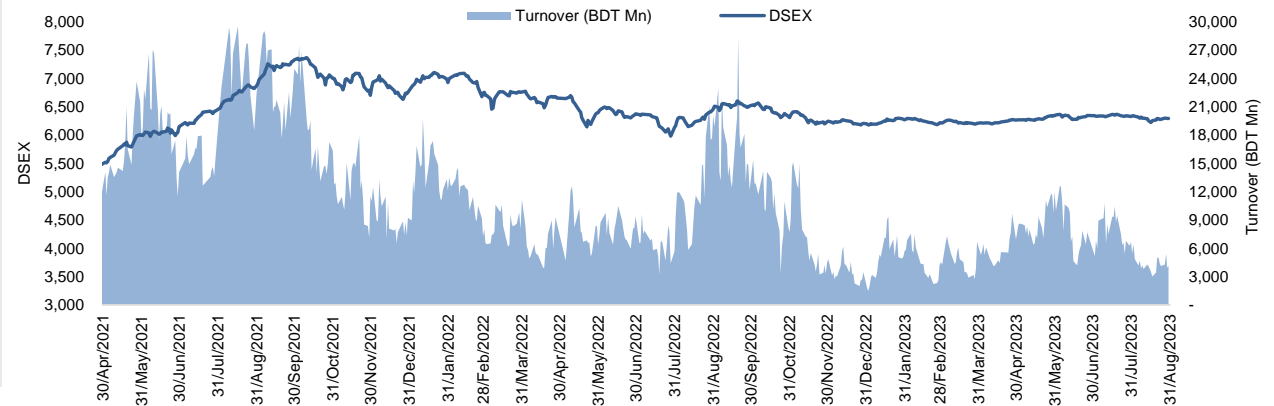


Figure: Sectorial Turnover (BDT Mn)

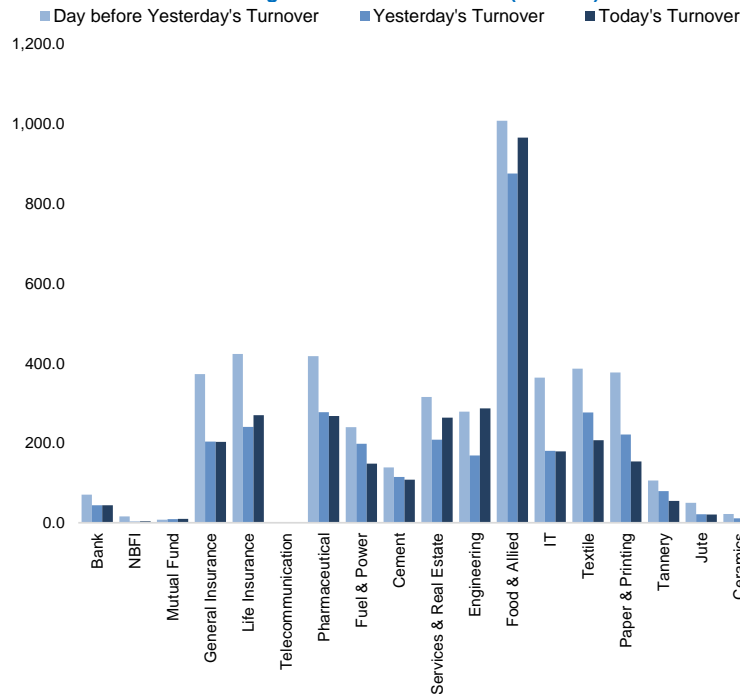
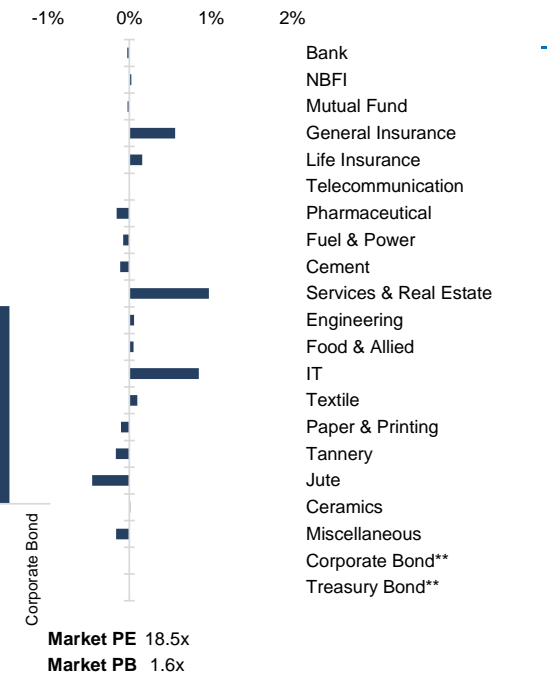


Figure: Sectorial Mcap Change



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	1,451	1,452	-0.35	-0.02%	35	684,114	9.3%	43.6	1.2%	12.1x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,919	1,919	+0.50	+0.03%	23	186,773	2.5%	3.4	0.1%	NM	5.8x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	829	-0.19	-0.02%	37	37,463	0.5%	9.6	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.4x	6.2x
General Insurance	3,419	3,400	+19.12	+0.56%	42	99,798	1.4%	202.6	5.5%	18.5x	1.6x	SQURPHARMA	187,041	4.1%	13.5	9.9x	1.7x
Life Insurance	2,663	2,658	+4.23	+0.16%	15	74,420	1.0%	269.4	7.3%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.8	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,728	3,734	-5.75	-0.15%	34	723,240	9.8%	267.6	7.3%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,703	-1.30	-0.08%	23	448,983	6.1%	148.0	4.0%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,583	2,585	-2.93	-0.11%	7	124,040	1.7%	107.7	2.9%	27.3x	2.7x	BERGERPBL	86,050	1.9%	3.3	28.1x	6.2x
Services & Real Esta	1,826	1,808	+17.62	+0.97%	8	72,133	1.0%	263.4	7.1%	24.5x	0.9x	LHBL	81,064	1.8%	66.7	13.8x	4.1x
Engineering	4,495	4,492	+2.62	+0.06%	42	527,512	7.2%	286.6	7.8%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,626	21,615	+10.92	+0.05%	21	400,170	5.4%	965.7	26.2%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,149	3,123	+26.59	+0.85%	11	41,059	0.6%	179.1	4.9%	29.0x	3.0x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,631	1,629	+1.59	+0.10%	58	170,689	2.3%	207.0	5.6%	79.6x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	11,032	11,043	-11.28	-0.10%	6	42,504	0.6%	153.5	4.2%	41.0x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,220	3,226	-5.31	-0.16%	6	34,011	0.5%	54.9	1.5%	46.5x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,132	16,206	-73.80	-0.46%	3	3,946	0.1%	20.7	0.6%	NM	-1370.0x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	+0.08	+0.01%	5	31,454	0.4%	11.2	0.3%	53.4x	1.9x	UNILEVERCL	39,379	0.9%	3.5	45.5x	22.4x
Miscellaneous	4,225	4,232	-6.91	-0.16%	14	230,064	3.1%	495.4	13.4%	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%	0.2	12.1x	0.9x
Treasury Bond**	88	88	-	-	232	2,806,555	38.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DAFODILCOM	80.6	+10.0%	36.2	NM	5.9x
CENTRALPHL	12.8	+9.4%	40.8	NM	2.2x
KPPL	11.2	+7.7%	17.0	NM	NM
KBPPWBIL	27.9	+6.5%	264.3	NM	2.3x
OAL	12.0	+6.2%	39.2	NM	1.0x
FUWANGFOOD	38.2	+5.5%	502.7	NM	9.6x
YPL	27.4	+5.4%	74.9	NM	5x
OIMEX	22.0	+4.8%	22.7	NM	2.0x
SEAPEARL	182.7	+4.2%	179.9	26.5x	10.6x
LEGACYFOOT	119.8	+4.2%	49.0	NM	13.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	257.1	-2.5%	13.1	34.1x	5.3x
GEMINISEA	761.0	-2.2%	124.9	36.3x	30x
BDWELDING	22.7	-2.2%	5.5	NM	2.0x
MIRACLEIND	41.1	-2.1%	67.1	NM	1.3x
ISNLTD	46.7	-1.9%	4.7	86.5x	14.6x
ORIONINFU	332.2	-1.7%	46.8	NM	24.1x
AZIZPIPES	103.3	-1.5%	9.1	NM	NM
MONNOAGML	796.9	-1.5%	10.0	NM	4.6x
PUBALIBANK	27.5	-1.4%	1.7	4.7x	0.6x
SHURWID	14.1	-1.4%	1.5	NM	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	4.3%	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%	4.7x	0.6x
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%	26.5x	10.6x
UPGDCL	13,547	0.8%	16.7x	4.4x
PRIMEBANK	13,491	0.8%	5.1x	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
FUWANGFOOD	38.2	+5.5%	502.7	NM	9.6x
KBPPWBIL	27.9	+6.5%	264.3	NM	2.3x
SEAPEARL	182.7	+4.2%	179.9	26.5x	10.6x
RUPALILIFE	113.9	+2.2%	142.7	NM	NM
EMERALDOIL	169.1	+1.9%	134.9	NM	NM
GEMINISEA	761.0	-2.2%	124.9	36.3x	30.0x
INTRACO	41.2	-1.2%	118.0	27.4x	3.2x
RDFOOD	48.8	+2.3%	91.8	39.7x	3.0x
SKTRIMS	30.9	+0.3%	88.5	27.3x	2.0x
SONALIPAPR	697.0	-	76.9	74.5x	4.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONALIPAPR	748.0	660.0	8.0	112	76.48
DAFODILCOM	73.4	67.0	24.0	988	68.50
SEAPEARL	192.4	165.5	11.0	370	65.22
FORTUNE	82.7	82.7	1.0	425	35.18
GREENDELT	78.6	78.6	1.0	340	26.72
EMERALDOIL	160.0	152.0	3.0	136	20.72
BATBC	479.8	479.8	5.0	35	16.93
AL-HAJTEX	185.1	175.0	4.0	83	14.97
BRACBANK	32.3	32.3	1.0	460	14.86
PRAGATILIF	133.0	133.0	1.0	67	8.85

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	748.0	660.0	76.5	112	8
DAFODILCOM	73.4	67.0	68.5	988	24
SEAPEARL	192.4	165.5	65.2	370	11
FORTUNE	82.7	82.7	35.2	425	1
GREENDELT	78.6	78.6	26.7	340	1
EMERALDOIL	160.0	152.0	20.7	136	3
BATBC	479.8	479.8	16.9	35	5
AL-HAJTEX	185.1	175.0	15.0	83	4
BRACBANK	32.3	32.3	14.9	460	1
PRAGATILIF	133.0	133.0	8.8	67	1
GP	261.6	261.6	8.4	32	5
UNIONINS	62.0	58.0	6.8	112	3
SALVOCHEM	67.9	62.3	6.1	94	3
BSCCL	218.1	199.8	5.9	27	3
AAMRANET	63.0	63.0	5.0	80	2
INDEXAGRO	102.0	101.0	3.6	36	4
ACFL	24.1	24.1	3.6	150	5
UPGDCL	220.2	220.1	3.2	15	2
CNATEX	10.1	10.1	2.9	290	3
NBL	8.2	8.1	2.9	355	4
SIMTEX	26.3	24.8	2.4	96	3
INTRACO	44.5	44.5	2.2	50	1
<b>Total</b>			<b>443.8</b>		<b>155</b>

#### 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

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**Important DSE News**

**DACCADYE**  
 The company has informed that Titas Gas Authority temporarily stopped the company's gas meter connection on 26.07.2023. As a result, production in the dyeing department was shut down. However, other departments of the company are running as usually.

**PADMAOIL**  
 The Company has informed that Mr. Md Nurul Alam, Secretary, Energy & Mineral Resources Division has been appointed as Chairman of the Board of Directors of the Company in place of Dr. Md. Khairuzzaman Mozumder with effect from August 29, 2023.