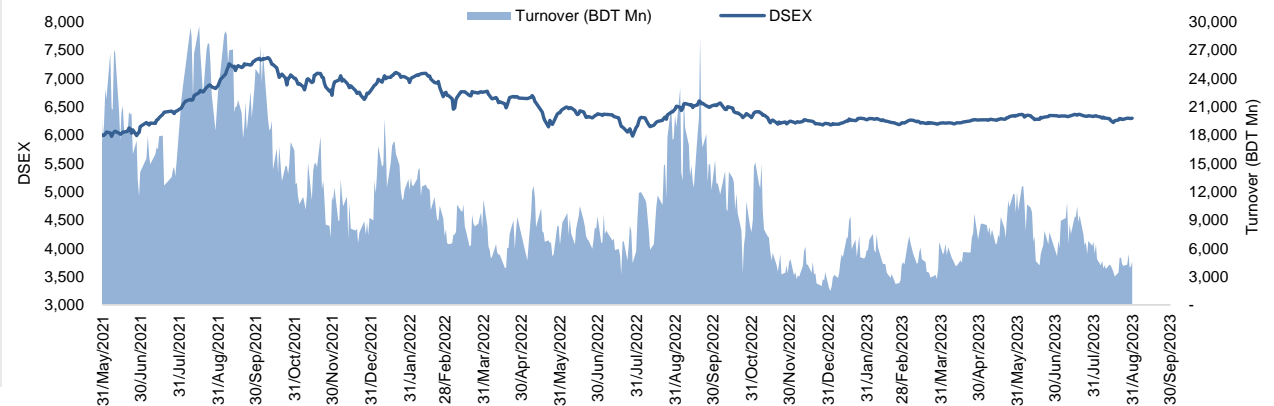


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.10%) gained 6.36 points and closed at 6,299.50. The blue-chip index DS30 (+0.09%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (+0.05%) closed at 2,141.61, 1,372.52, and 1,212.08 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.17% followed by Bank (+0.05%), Telecommunication (0.00%). NBLI experienced the highest loss of 0.03% followed by Pharmaceutical (-0.02%), Engineering (-0.01%), Fuel & Power (-0.01%). Block trades contributed 9.2% of the overall market turnover. Fu Wang Food Ltd. (+6.3%) was the most traded share with a turnover of BDT 574 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,299.50	6,293.14	+6.36	+0.10%	+1.5%
DS30	2,141.61	2,139.58	+2.03	+0.09%	-2.4%
DSES	1,372.52	1,371.49	+1.04	+0.08%	+1.0%
CDSET	1,212.08	1,211.43	+0.65	+0.05%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	87	67	163	317
A Category (Equity)	60	30	116	206
B Category (Equity)	20	31	36	87
N Category (Equity)	3	0	1	4
Z Category (Equity)	4	6	10	20
Mutual Funds	2	1	17	20
Corporate Bonds	0	0	0	0
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,760,576	7,757,987	+0.0%
	Mn USD	70,873	70,849	
Turnover	Mn BDT	4,562	4,134	+10.3%
	Mn USD	42	38	
Volume	Mn Shares	91	91	-0.5%
No. of Trade		105,825	102,746	+3.0%

\* Average Interbank Exchange Rate is BDT 109.50 as of Aug 31, 2023

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Figure: Sectorial Turnover (BDT Mn)

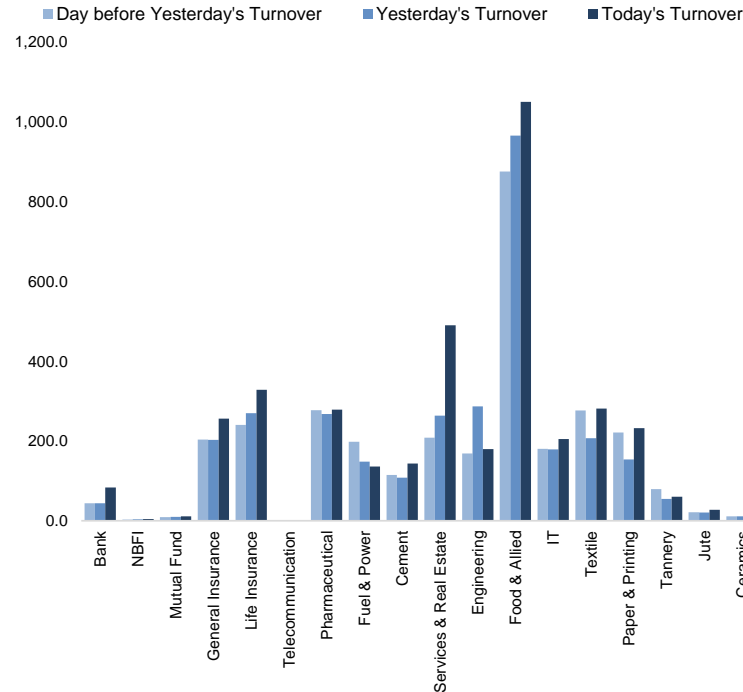
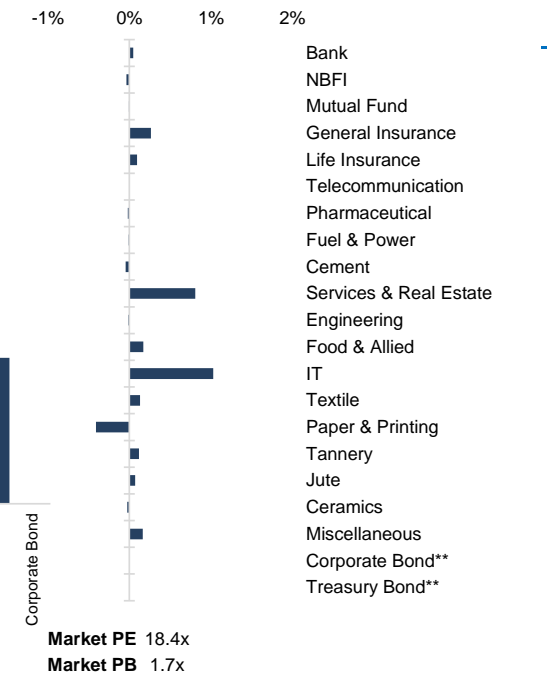


Figure: Sectorial Mcap Change



\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBLI

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	1,451	+0.72	+0.05%	35	684,456	9.3%	83.7	2.0%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,919	1,919	-0.65	-0.03%	23	186,710	2.5%	4.1	0.1%	NM	6.1x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	828	-0.05	-0.01%	37	37,461	0.5%	10.9	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.1	15.4x	6.2x
General Insurance	3,428	3,419	+9.02	+0.26%	42	100,062	1.4%	256.0	6.2%	18.6x	1.6x	SQURPHARMA	187,130	4.1%	25.6	9.9x	1.7x
Life Insurance	2,665	2,663	+2.57	+0.10%	15	74,491	1.0%	328.1	7.9%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.7	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,728	3,728	-0.65	-0.02%	34	723,114	9.8%	278.4	6.7%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,702	-0.17	-0.01%	23	448,938	6.1%	136.1	3.3%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,581	2,583	-1.13	-0.04%	7	123,985	1.7%	143.3	3.5%	27.3x	2.7x	BERGERPBL	86,203	1.9%	6.4	28.2x	6.2x
Services & Real Esta	1,841	1,826	+14.78	+0.81%	8	72,717	1.0%	490.4	11.8%	16.7x	1.2x	LHBL	81,180	1.8%	88.2	13.8x	4.1x
Engineering	4,494	4,495	-0.55	-0.01%	42	527,448	7.2%	179.8	4.3%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,664	21,626	+37.48	+0.17%	21	400,863	5.4%	1,050.3	25.3%	20.2x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,182	3,149	+32.40	+1.03%	11	41,482	0.6%	204.6	4.9%	29.3x	3.0x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,633	1,631	+2.13	+0.13%	58	170,912	2.3%	281.6	6.8%	79.7x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,987	11,032	-45.10	-0.41%	6	42,331	0.6%	232.0	5.6%	40.8x	2.1x	ISLAMIBANK	52,486	1.2%	1.4	8.4x	0.7x
Tannery	3,224	3,220	+3.85	+0.12%	6	34,052	0.5%	60.3	1.5%	46.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,144	16,132	+11.40	+0.07%	3	3,949	0.1%	27.6	0.7%	NM	-1370.9x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-0.16	-0.02%	5	31,446	0.4%	10.0	0.2%	53.4x	1.9x	UNILEVERCL	39,379	0.9%	0.3	45.5x	22.4x
Miscellaneous	4,232	4,225	+6.91	+0.16%	14	230,441	3.1%	365.7	8.8%	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	2,806,631	38.1%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DAFODILCOM	86.4	+7.2%	48.1	NM	6.4x
FUWANGFOOD	40.6	+6.3%	574.2	NM	10.3x
APEXTANRY	107.5	+6.2%	4.8	NM	1.9x
EHL	95.1	+5.5%	321.6	14.1x	1.2x
GENNEXT	6.5	+4.8%	58.3	NM	0.5x
GEMINISEA	779.7	+2.5%	105.9	37.2x	30.7x
INTECH	26.0	+2.4%	9.1	NM	23x
SHURWID	14.4	+2.1%	1.0	NM	1.1x
EASTERNINS	48.9	+2.1%	8.9	15.8x	0.9x
NITOLINS	39.2	+2.1%	0.0	20.0x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RELIANCINS	67.6	-2.9%	4.3	13.2x	1.0x
OAL	11.7	-2.5%	13.0	NM	1x
JUTESPINN	329.9	-2.4%	1.4	NM	NM
CENTRALPHL	12.5	-2.3%	15.8	NM	2.2x
LEGACYFOOT	117.0	-2.3%	49.8	NM	13.1x
UNIONCAP	8.4	-2.3%	3.2	NM	NM
MIDASFIN	10.0	-2.0%	0.8	7.5x	1.1x
ARAMITCEM	26.6	-1.8%	22.8	NM	27.4x
PRIMELIFE	54.9	-1.8%	4.6	NM	NM
LIBRAINFU	831.7	-1.8%	7.2	NM	0.7x

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%	26.4x	10.5x
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
FUWANGFOOD	40.6	+6.3%	574.2	NM	10.3x
EHL	95.1	+5.5%	321.6	14.1x	1.2x
RUPALILIFE	114.1	+0.2%	209.6	NM	NM
SONALIPAPR	690.2	-1.0%	164.1	73.8x	4.0x
EMERALDOIL	171.8	+1.6%	159.5	NM	NM
SEAPEARL	181.9	-0.4%	128.9	26.4x	10.5x
RDFOOD	49.8	+2.0%	116.4	40.5x	3.1x
KBPPWBIL	28.3	+1.4%	115.8	NM	2.4x
GEMINISEA	779.7	+2.5%	105.9	37.2x	30.7x
INTRACO	41.3	+0.2%	100.0	27.5x	3.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	181.7	166.0	12.0	609	108.48
EMERALDOIL	185.0	153.2	15.0	499	77.21
SIMTEX	26.9	25.0	12.0	2,008	51.21
SONALIPAPR	697.0	645.1	5.0	67	46.49
BEXIMCO	104.1	104.1	6.0	334	34.81
FINEFOODS	121.3	119.0	5.0	160	19.31
ADNTEL	136.0	135.1	2.0	109	14.82
AL-HAJTEX	190.0	175.0	4.0	59	10.65
RENATA	1,141.8	1,141.8	4.0	4	4.87
DAFODILCOM	80.6	74.1	3.0	52	4.13

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPPEARL	181.7	166.0	108.5	609	12
EMERALDOIL	185.0	153.2	77.2	499	15
SIMTEX	26.9	25.0	51.2	2,008	12
SONALIPAPR	697.0	645.1	46.5	67	5
BEXIMCO	104.1	104.1	34.8	334	6
FINEFOODS	121.3	119.0	19.3	160	5
ADNTEL	136.0	135.1	14.8	109	2
AL-HAJTEX	190.0	175.0	10.6	59	4
RENATA	1,141.8	1,141.8	4.9	4	4
DAFODILCOM	80.6	74.1	4.1	52	3
IBNSINA	277.0	267.4	3.8	14	7
NBL	8.1	7.6	3.7	464	4
PADMAOIL	201.5	200.0	3.3	17	5
LRBDL	31.6	31.6	2.7	86	5
INTRACO	45.3	42.3	2.5	57	2
SILCOPHL	21.1	21.1	2.1	100	1
SINOBANGLA	77.9	75.9	2.0	26	3
IFIC	10.3	10.1	1.9	189	2
AAMRANET	64.0	64.0	1.9	30	2
ROBI	27.0	27.0	1.6	60	2
BNICL	62.0	62.0	1.6	25	1
ACI	241.0	237.5	1.2	5	2
<b>Total</b>			<b>418.3</b>		<b>133</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

#### Important DSE News

##### PREMIERLEA

The Board of Directors has recommended No dividend for the year ended December 31, 2022. Date of AGM: 16.11.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 25.09.2023. The Company has reported Consolidated EPS of Tk. (15.97), Consolidated NAV per share of Tk. (18.23) and Consolidated NOCFPS of Tk. 12.19 for the year ended December 31, 2022 as against Tk. (18.18), Tk. (2.12) and Tk. 4.59 respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** Consolidated EPS was Tk. (1.56) for January-March 2023 as against Tk. (2.42) for January-March 2022. Consolidated NOCFPS was Tk. 0.97 for January-March 2023 as against Tk. 2.32 for January-March 2022. Consolidated NAV per share was Tk. (19.79) as on March 31, 2023 and Tk. (4.58) as on March 31, 2022.

**(Q2 Un-audited):** Consolidated EPS was Tk. (2.67) for April-June 2023 as against Tk. (2.99) for April-June 2022; Consolidated EPS was Tk. (4.22) for January-June 2023 as against Tk. (5.40) for January-June 2022. Consolidated NOCFPS was Tk. 2.90 for January-June 2023 as against Tk. 4.49 for January-June 2022. Consolidated NAV per share was Tk. (22.48) as on June 30, 2023 and Tk. (7.65) as on June 30, 2022. Consolidated EPS has been increased due to increase in interest income against loan/lease/advance.

##### EHL

The Board of Directors has recommended 25% Cash Dividend for the year ended June 30, 2023. Date of AGM: 18.10.2023, Time: 10:30 AM, Venue: Digital Platform through the link: <https://ehl.bdvirtualagm.com>. Record Date: 21.09.2023. The Company has reported EPS of Tk. 7.37, NAV per share of Tk. 80.08 and NOCFPS of Tk. 20.56 for the year ended June 30, 2023 as against Tk. 5.88, Tk. 74.71 and Tk. 21.80 respectively for the year ended June 30, 2022.

##### WALTONHIL

Referring to the BSEC letter No. BSEC/SRMIC/160-2020/Part-I/140 dated May 25, 2023 and BSEC/SRMIC/160-2020(Part-I)/200 dated May 22, 2022, S. M. Ashrafur Alam, one of the Sponsor Directors of the Company, has expressed his intention to sell 25,000 shares out of his holding 6,58,81,643 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Limited within next 30 working days.

##### LANKABAFIN

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'LankaBangla Finance PLC' instead of 'LankaBangla Finance Limited' with effect from September 03, 2023. Other things (except name) will remain unchanged.

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