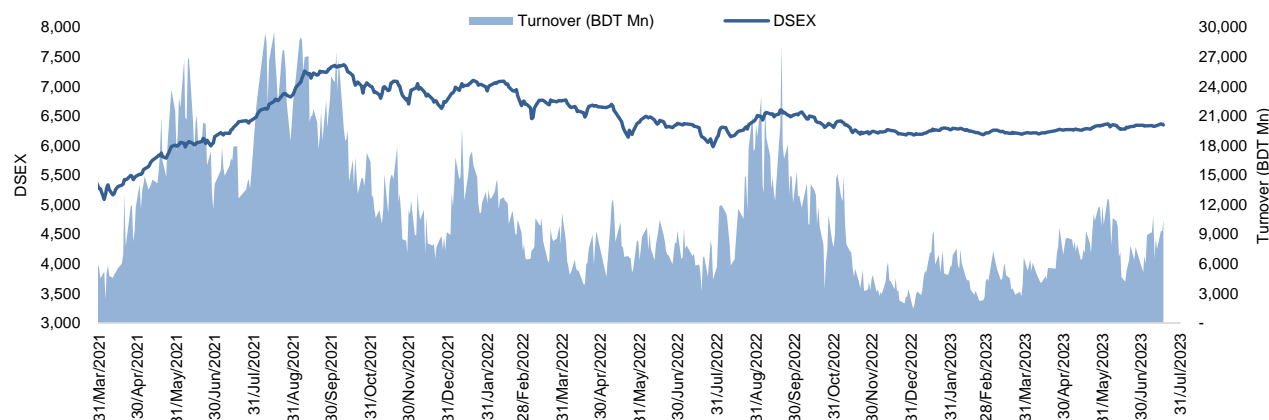


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.16%) lost 10.06 points and closed at 6,351.10. The blue-chip index DS30 (-0.12%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (-0.03%) closed at 2,197.77, 1,387.93, and 1,214.71 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.10% followed by Bank (+0.09%), Telecommunication (0.00%). Food & Allied experienced the highest loss of 0.33% followed by NBF (I) (-0.13%), Fuel & Power (-0.12%), Pharmaceutical (-0.07%). Block trades contributed 14.5% of the overall market turnover. Fu Wang Food Ltd. (-6.8%) was the most traded share with a turnover of BDT 673 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,351.10	6,361.16	-10.06	-0.16%	+2.3%
DS30	2,197.77	2,200.36	-2.60	-0.12%	+0.1%
DSES	1,387.93	1,386.77	+1.17	+0.08%	+2.1%
CDSET	1,214.71	1,215.03	-0.32	-0.03%	+0.0%

	Advanced	Declined	Unchanged	Total
All Category	63	119	188	370
A Category (Equity)	30	70	138	238
B Category (Equity)	29	36	38	103
N Category (Equity)	1	3	1	5
Z Category (Equity)	3	10	11	24
Mutual Funds	0	3	25	28
Corporate Bonds	1	0	5	6
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,622,420	7,611,685	+0.1%
	Mn USD	69,988	69,890	
Turnover	Mn BDT	10,446	9,327	+12.0%
	Mn USD	96	86	
Volume	Mn Shares	244	244	+0.1%
No. of Trade		202,923	198,627	+2.2%

* Average Interbank Exchange Rate is BDT 108.91 as of Jul 17, 2023

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	HZ Towhidi Khan Senior Research Associate (880) 1708805224 hztowhidi.khan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

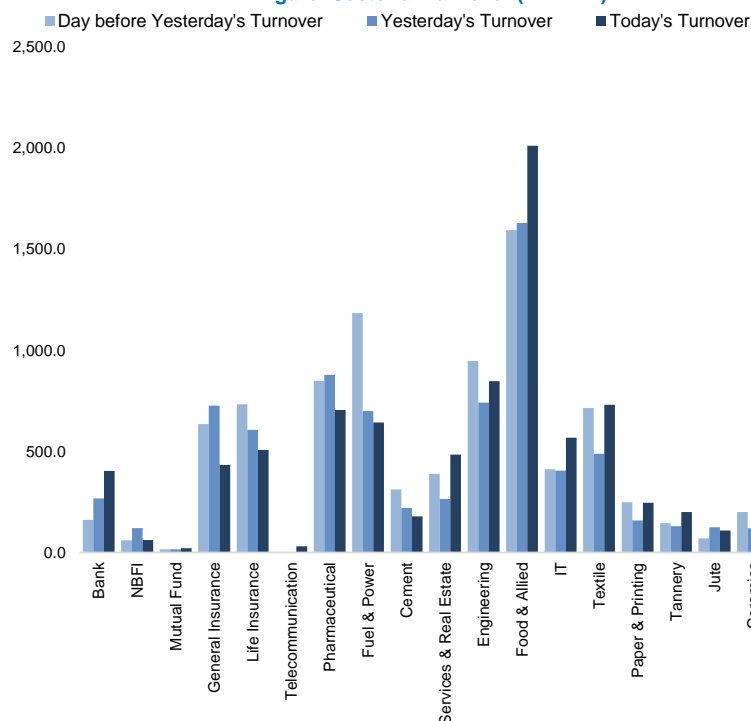
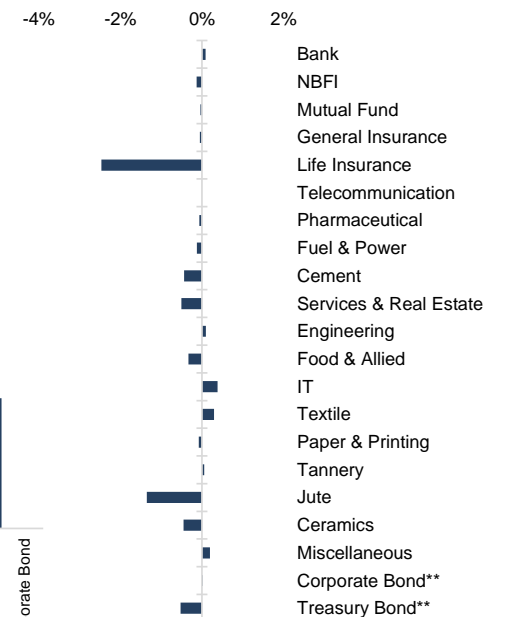


Figure: Sectorial Mcap Change



Market PE 18.6x

Market PB 1.7x

* 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	1,459	1,458	+1.26	+0.09%	35	687,780	9.3%	403.8	4.5%	11.8x	0.7x	GP	386,996	8.5%	4.2	11.9x	7.3x
NBFI	1,925	1,927	-2.57	-0.13%	23	187,314	2.5%	61.5	0.7%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	833	833	-0.30	-0.04%	37	37,675	0.5%	21.4	0.2%	NM	0.7x	BATBC	280,098	6.1%	1.2	15.3x	6.9x
General Insurance	3,348	3,350	-1.74	-0.05%	42	97,713	1.3%	433.4	4.9%	17.9x	1.5x	SQURPHARM	189,080	4.1%	90.2	10.0x	1.7x
Life Insurance	2,845	2,917	-71.87	-2.46%	15	79,523	1.1%	506.9	5.7%	NM	NM	ROBI	157,138	3.4%	26.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	30.5	0.3%	15.6x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,726	3,729	-2.49	-0.07%	34	722,860	9.8%	705.1	7.9%	19.5x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,703	1,706	-2.08	-0.12%	23	449,317	6.1%	642.2	7.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,617	2,629	-11.59	-0.44%	7	125,697	1.7%	178.9	2.0%	32.0x	2.7x	LHBL	81,993	1.8%	107.9	15.2x	4.1x
Services & Real Est	1,991	2,001	-10.09	-0.50%	8	78,661	1.1%	483.4	5.4%	26.7x	1.0x	BERGERPBL	81,440	1.8%	4.1	27.1x	6.3x
Engineering	4,525	4,520	+4.42	+0.10%	42	531,072	7.2%	847.2	9.5%	72.6x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,692	21,764	-71.90	-0.33%	21	401,392	5.4%	2,011.4	22.5%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,310	3,297	+12.70	+0.39%	11	43,152	0.6%	567.8	6.4%	30.2x	3.1x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,650	1,645	+4.91	+0.30%	58	172,751	2.3%	730.6	8.2%	85.1x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,813	10,822	-8.54	-0.08%	6	41,663	0.6%	246.0	2.8%	40.2x	2.1x	ISLAMIBANK	52,486	1.1%	0.0	8.9x	0.8x
Tannery	3,267	3,265	+1.92	+0.06%	6	34,506	0.5%	200.3	2.2%	49.7x	3.4x	DUTCHBANGL	44,203	1.0%	0.8	7.6x	1.0x
Jute	16,502	16,728	-226.53	-1.35%	3	4,037	0.1%	108.5	1.2%	NM	-1401.4x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	691	695	-3.15	-0.45%	5	31,980	0.4%	111.4	1.2%	48.3x	1.9x	UNILEVERCL	39,491	0.9%	0.5	44.9x	13.1x
Miscellaneous	4,178	4,170	+8.06	+0.19%	14	227,460	3.1%	643.7	7.2%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.02%	10	36,590	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.2	12.1x	0.9x
Treasury Bond**	89	89	-0.47	-0.53%	233	2,835,321	38.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap (BDT Mn)	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ASIAPACINS	51.9	+10.0%	30.6	21.4x	2.2x	SQURPHARMA	121,499	7.1%	10.0x	1.7x	FUWANGFOOD	37.3	-6.8%	673.1	NM	9.4x
AZIZPIPES	133.7	+10.0%	127.8	NM	NM	BATBC	74,086	4.3%	15.3x	6.9x	RDFOOD	59.9	+9.9%	569.7	48.7x	3.7x
DESHBANDHU	27.7	+9.9%	110.5	79.1x	1.5x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	217.4	-0.7%	330.5	31.5x	12.6x
RDFOOD	59.9	+9.9%	569.7	48.7x	3.7x	RENATA	68,042	4.0%	38.0x	4.6x	KBPPWBIL	38.9	+9.9%	311.4	NM	3.3x
KBPPWBIL	38.9	+9.9%	311.4	NM	3.3x	BXPHARMA	45,564	2.6%	14.6x	1.5x	MIDLANDBNK	16.9	+9.7%	292.1	17.4x	1.3x
MIDLANDBNK	16.9	+9.7%	292.1	17.4x	1.3x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	LRBDL	37.4	-4.1%	250.0	17.1x	1.0x
KPPL	14.9	+9.6%	88.8	NM	NM	GP	38,700	2.2%	11.9x	7.3x	EMERALDOIL	154.3	-9.9%	214.4	NM	NM
KAY&QUE	242.9	+8.7%	57.6	NM	3.3x	BRACBANK	30,976	1.8%	9.0x	0.9x	DELTALIFE	154.9	-5.0%	197.6	NM	NM
BEACHHATCH	50.3	+8.6%	195.4	48.4x	4.7x	LHBL	26,980	1.6%	15.2x	4.1x	AOL	36.5	-1.6%	196.2	23.4x	1.9x
SAMATALETH	68.5	+7.7%	13.0	NM	4.8x	EBL	24,998	1.5%	6.9x	0.9x	BEACHHATCH	50.3	+8.6%	195.4	48.4x	4.7x
						OLYMPIC	19,683	1.1%	18.3x	3.0x						
						NBL	19,116	1.1%	NM	0.7x						
						PUBALIBANK	18,314	1.1%	4.7x	0.6x						
						CITYBANK	18,211	1.1%	5.5x	0.8x						
						SEAPEARL	16,847	1.0%	31.5x	12.6x						
						ROBI	15,714	0.9%	85.7x	2.3x						
						ALARABANK	15,220	0.9%	15.0x	1.1x						
						PRIMEBANK	14,248	0.8%	5.1x	0.7x						
						BSRMLTD	14,210	0.8%	NM	0.7x						
						UPGDCL	13,547	0.8%	16.7x	4.4x						
															</	

* 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
RUPALILIFE	209.0	171.0	699.3	3,847	17
SEAPEARL	238.0	219.0	203.9	929	8
AL-HAJTEX	183.0	166.0	132.6	766	47
SIMTEX	24.8	23.5	75.3	3,092	21
RDFOOD	57.0	49.2	60.0	1,104	24
GP	269.8	261.6	42.6	162	61
ROBI	29.0	27.0	32.1	1,165	42
BATBC	518.7	479.8	31.8	66	24
SJIBLPBOND	5,000.0	5,000.0	25.0	5	1
TOSRIFA	30.0	29.0	22.4	753	16
UNIONINS	56.6	56.0	21.3	379	4
EMERALDOIL	188.4	160.0	13.2	82	3
ISLAMICFIN	21.6	21.6	10.2	473	1
KBPPWBIL	32.5	32.5	7.0	215	1
PREMIERBAN	12.5	12.5	6.0	476	2
SQURPHARMA	194.5	194.5	5.9	30	2
PTL	82.0	72.1	5.9	78	8
GENEXIL	89.9	84.7	5.5	64	4
ADVENT	26.2	26.2	5.2	200	1
MLDYEING	24.8	22.5	5.1	210	7
FAREASTLIF	68.1	67.5	4.1	60	6
DESHBANDHU	27.6	22.8	3.9	149	6
Total			1,511.6		422

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SONARBAINS		5.0%	10%	Record Date	20-Jul-23
PRAGATILIF		0.0%	12%	Record Date	20-Jul-23
UNIONINS		0.0%	10%	Record Date	23-Jul-23
ICICL		0.0%	10%	Record Date	23-Jul-23
EIL		0.0%	7%	Record Date	24-Jul-23
PRIMEINSUR		0.0%	10%	Record Date	30-Jul-23
PADMALIFE		0.0%	0%	Record Date	20-Aug-23

Important DSE News
GP

(Q2 Audited): EPS was Tk. 8.84 for April-June 2023 as against Tk. 6.82 for April-June 2022; EPS was Tk. 14.62 for January-June 2023 as against Tk. 12.82 for January-June 2022. NOCFPS was Tk. 20.15 for January-June 2023 as against Tk. 23.61 for January-June 2022. NAV per share was Tk. 39.34 as on June 30, 2023 and Tk. 34.22 as on December 31, 2022. Reasons for deviation in EPS, NOCFPS and NAVPS: EPS has been increased due to increase in net profit after tax. NOCFPS has been decreased due to higher payment of income tax. NAVPS has been increased due to higher profit.

PADMALIFE

The Board of Directors has recommended No dividend for the year ended December 31, 2022. Date of AGM: 24.09.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 20.08.2023.

(Q1 Un-audited): As per life revenue account of the company for January to March 2023, Balance of Life Insurance Fund as on March 31, 2023 was BDT (2,397,932,844) as against BDT 131,707,345 as on March 31, 2022. Net premium was BDT 31,714,579 during January-March 2023 as against BDT 78,570,055 during January-March 2022.

ILFSL

(Q1 Un-audited): Consolidated EPS was Tk. (2.15) for January-March 2023 as against Tk. (2.11) for January-March 2022. Consolidated NOCFPS was Tk. 0.21 for January-March 2023 as against Tk. (1.51) for January-March 2022. Consolidated NAV per share was Tk. (164.39) as on March 31, 2023 and Tk. (162.24) as on March 31, 2022.

(Q2 Un-audited): Consolidated EPS was Tk. (2.76) for January-June 2023 as against Tk. (2.11) for January-June 2022; Consolidated NOCFPS was Tk. 0.14 for January-June 2023 as against Tk. 0.31 for January-June 2022. Consolidated NAV per share was Tk. (165.00) as on June 30, 2023 and Tk. (162.24) as on June 30, 2022.

AL-HAJTEX

The Company has informed that the newly constituted Board of Directors has elected Mr. Syed Tariquzzaman as the new Chairman of the Board of Directors of the company with effect from July 13, 2023.

KAY&QUE

Refer to the earlier news disseminated by DSE on 11.04.2023 regarding increase of paid-up capital of the Company, the company has further informed that BSEC has accorded its kind consent for raising the paid-up capital of the company from existing Tk. 51,476,560/- to Tk. 68,559,309/- by issuing 1,708,275 nos. of ordinary shares @ Tk. 10.00 each totaling Tk. 17,082,750/- only to Shareholders of Multisourcing Limited as per the Scheme of amalgamation approved by the Honorable High Court.

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