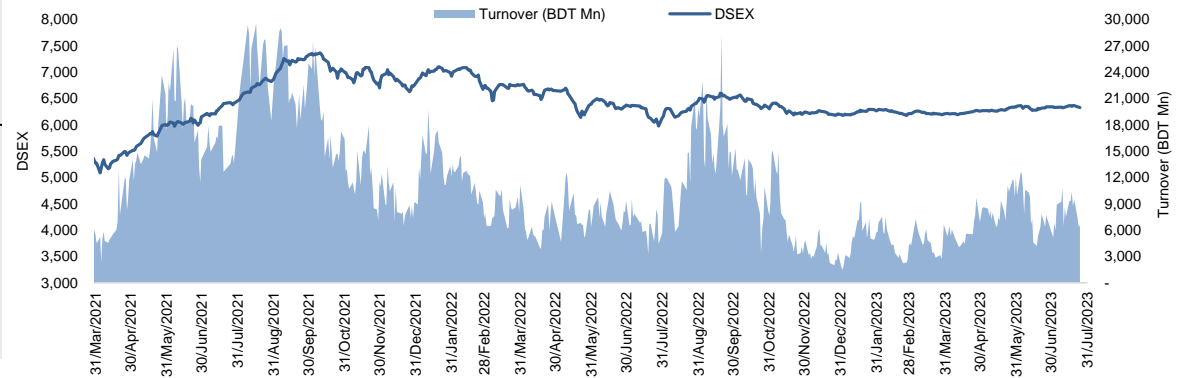


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.11%) lost 6.86 points and closed at 6,331.03. The blue-chip index DS30 (-0.20%), the Shariah-based index DSES (-0.10%), and the large-cap index CDSET (+0.06%) closed at 2,162.34, 1,373.13, and 1,211.19 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.27% followed by Engineering (-0.12%), NBFi (-0.04%), Fuel & Power (-0.02%), Bank (-0.01%), Telecommunication (0.00%), and Pharmaceutical (+0.07%), respectively. Block trades contributed 4.6% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+0.9%) was the most traded share with a turnover of BDT 302 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,331.03	6,337.89	-6.86	-0.11%	+2.0%
DS30	2,162.34	2,166.69	-4.35	-0.20%	-1.5%
DSES	1,373.13	1,374.48	-1.35	-0.10%	+1.1%
CDSET	1,211.19	1,210.52	+0.67	+0.06%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	49	125	187	361
A Category (Equity)	31	69	130	230
B Category (Equity)	11	47	48	106
N Category (Equity)	2	1	1	4
Z Category (Equity)	5	8	8	21
Mutual Funds	0	2	22	24
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,633,117	7,630,482	+0.0%
	Mn USD	70,183	70,159	
Turnover	Mn BDT	6,610	6,335	+4.3%
	Mn USD	61	58	
Volume	Mn Shares	137	145	-6.0%
No. of Trade		159,582	157,802	+1.1%

\* Average Interbank Exchange Rate is BDT 108.76 as of Jul 24, 2023

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

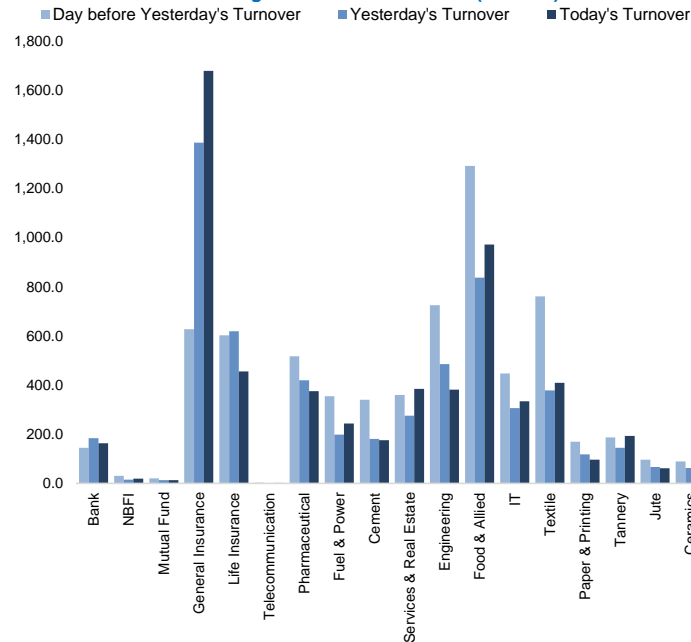
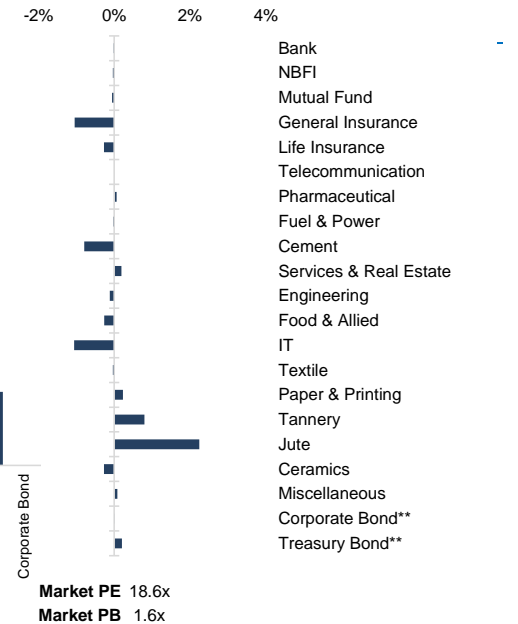


Figure: Sectorial Mcap Change



Market PE 18.6x  
Market PB 1.6x

\* 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	1,457	1,457	-0.19	-0.01%	35	686,839	9.3%	163.7	2.6%	12.0x	0.7x	GP	386,996	8.5%	1.4	11.9x	7.3x
NBFI	1,922	1,923	-0.71	-0.04%	23	187,021	2.5%	20.0	0.3%	NM	4.4x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	833	833	-0.49	-0.06%	37	37,664	0.5%	12.9	0.2%	NM	0.7x	BATBC	280,098	6.1%	4.5	15.4x	6.2x
General Insurance	3,567	3,605	-37.70	-1.05%	42	104,104	1.4%	1,677.1	26.6%	19.0x	1.6x	SQURPHARM	186,687	4.1%	69.4	9.9x	1.7x
Life Insurance	2,828	2,836	-7.71	-0.27%	15	79,044	1.1%	455.6	7.2%	NM	NM	ROBI	157,138	3.4%	0.0	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	1.7	0.0%	15.6x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,704	3,702	+2.43	+0.07%	34	718,499	9.7%	375.0	5.9%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,699	1,700	-0.42	-0.02%	23	448,188	6.0%	244.1	3.9%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,581	2,601	-20.58	-0.79%	7	123,942	1.7%	175.3	2.8%	28.1x	2.7x	BERGERPBL	81,416	1.8%	2.6	27.0x	6.3x
Services & Real Esta	1,997	1,993	+3.75	+0.19%	8	78,881	1.1%	384.4	6.1%	26.8x	1.0x	LHBL	78,857	1.7%	50.1	13.4x	4.0x
Engineering	4,510	4,515	-5.30	-0.12%	42	529,339	7.1%	381.3	6.0%	69.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,550	21,607	-57.31	-0.27%	21	398,749	5.4%	970.9	15.4%	20.0x	7.4x	BXPBARMA	65,222	1.4%	0.7	14.6x	1.5x
IT	3,194	3,228	-34.17	-1.06%	11	41,643	0.6%	334.2	5.3%	29.1x	3.0x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,644	1,644	-0.58	-0.04%	58	172,127	2.3%	409.2	6.5%	80.2x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,647	10,622	+24.55	+0.23%	6	41,021	0.6%	96.8	1.5%	39.6x	2.1x	ISLAMIBANK	52,486	1.2%	0.1	8.9x	0.8x
Tannery	3,273	3,247	+25.96	+0.80%	6	34,570	0.5%	193.4	3.1%	49.8x	3.4x	DUTCHBANGL	44,203	1.0%	2.0	7.6x	1.0x
Jute	16,706	16,339	+366.80	+2.24%	3	4,087	0.1%	61.1	1.0%	NM	-1418.7x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	684	686	-1.85	-0.27%	5	31,648	0.4%	51.1	0.8%	52.5x	1.9x	UNILEVERCL	39,472	0.9%	2.1	44.8x	13.1x
Miscellaneous	4,155	4,152	+3.58	+0.09%	14	226,238	3.1%	298.9	4.7%	16.0x	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%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.3	12.1x	0.9x
Treasury Bond**	89	89	+0.18	+0.21%	232	2,848,281	38.4%	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
LEGACYFOOT	133.5	+10.0%	170.9	NM	14.9x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	SEAPPEARL	230.8	+0.9%	302.3	33.4x	13.4x
ASIAINS	53.7	+9.8%	155.4	25.6x	2.0x	BATBC	74,086	4.3%	15.4x	6.2x	FUWANGFOOD	34.1	-3.4%	263.3	NM	8.6x
EIL	31.1	+9.1%	95.2	28.8x	1.7x	BEXIMCO	69,196	4.0%	12.0x	1.2x	RDFOOD	51.1	-3.9%	216.6	41.5x	3.2x
AIL	93.5	+5.3%	153.2	58.4x	4.1x	RENATA	68,042	4.0%	38.0x	4.6x	CRYSTALINS	59.2	+0.5%	178.6	18.2x	2.4x
UNITEDINS	44.3	+4.7%	11.6	27.9x	1.4x	BXPBARMA	45,564	2.6%	14.6x	1.5x	GEMINISEA	815.9	+0.8%	177.2	38.9x	32.1x
AZIZPIPES	121.7	+4.6%	37.0	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	LEGACYFOOT	133.5	+10.0%	170.9	NM	14.9x
ORIONINFU	374.5	+4.1%	138.2	NM	27x	GP	38,700	2.2%	11.9x	7.3x	LRBDL	35.1	-0.6%	160.9	16.0x	0.9x
PRIMELIFE	67.5	+3.5%	33.2	NM	NM	BRACBANK	30,976	1.8%	9.0x	0.9x	ASIAINS	53.7	+9.8%	155.4	25.6x	2.0x
SONALIANS	550.4	+2.8%	59.8	NM	4.8x	LHBL	26,980	1.6%	13.4x	4.0x	AIL	93.5	+5.3%	153.2	58.4x	4.1x
REPUBLIC	37.7	+2.2%	30.5	18.9x	2.1x	EBL	24,998	1.5%	6.9x	0.9x	ADNTEL	145.4	-2.2%	150.7	37.8x	5.3x

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)
RUPALILIFE	125.4	-9.9%	114.7	NM	NM	NBL	19,116	1.1%	NM	0.7x	SEAPPEARL	245.0	216.0	11.0	310	74.79
JANATAINS	38.4	-6.8%	40.3	27.3x	2x	PUBALIBANK	18,314	1.1%	4.8x	0.6x	AL-HAJTEX	185.0	176.0	6.0	186	33.46
PARAMOUNT	47.6	-6.5%	35.6	27.2x	1.8x	CITYBANK	18,211	1.1%	5.5x	0.8x	RUPALILIFE	145.1	145.0	2.0	100	14.48
MIDLANDBNK	14.7	-6.4%	78.3	15.2x	1.1x	SEAPPEARL	16,847	1.0%	33.4x	13.4x	INTRACO	46.9	46.9	1.0	289	13.53
GLOBALINS	36.4	-5.5%	44.4	23.5x	2.6x	ROBI	15,714	0.9%	85.7x	2.3x	PRIMEINSUR	78.1	74.8	2.0	149	10.51
RELIANCINS	67.3	-4.3%	12.2	12.9x	1.1x	ALARABANK	15,220	0.9%	14.9x	1.1x	CITYGENINS	46.8	46.8	1.0	200	9.36
UNIONCAP	9.2	-4.2%	15.8	NM	NM	PRIMEBANK	14,248	0.8%	5.1x	0.7x	SHAHJABANK	18.3	17.5	6.0	442	7.97
HEIDELBCEM	298.6	-4.0%	81.3	52.5x	4.5x	BSRMLTD	14,210	0.8%	NM	0.7x	NBL	8.0	7.9	9.0	900	7.19
RDFOOD	51.1	-3.9%	216.6	41.5x	3.2x	UPGDCL	13,547	0.8%	16.7x	4.4x	BATBC	479.8	479.8	10.0	14	6.95
ASIAPACINS	53.6	-3.9%	16.9	22.1x	2.3x						SONALIPAPR	621.0	590.0	4.0	11	6.72

\* 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
SEAPPEARL	245.0	216.0	74.8	310	11
AL-HAJTEX	185.0	176.0	33.5	186	6
RUPALILIFE	145.1	145.0	14.5	100	2
INTRACO	46.9	46.9	13.5	289	1
PRIMEINSUR	78.1	74.8	10.5	140	2
CITYGENINS	46.8	46.8	9.4	200	1
SHAHJABANK	18.3	17.5	8.0	442	6
NBL	8.0	7.9	7.2	900	9
BATBC	479.8	479.8	7.0	14	10
SONALIPAPR	621.0	590.0	6.7	11	4
CNATEX	11.1	11.1	6.7	600	1
PTL	76.7	69.3	6.5	89	7
SIBL	11.2	11.1	5.6	500	6
ROBI	27.8	27.0	5.4	199	6
RENATA	1,201.0	1,141.8	5.3	5	2
AIL	80.0	80.0	5.0	62	3
LINDEBD	1,380.0	1,380.0	4.1	3	2
GSPFINANCE	31.5	27.3	3.9	132	4
IFIC	11.5	10.1	3.5	324	5
BXPHERMA	160.5	132.2	3.2	23	5
LRBDL	35.0	35.0	3.2	90	2
GP	286.1	261.6	3.0	11	5
<b>Total</b>			<b>302.9</b>		<b>187</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PRIMEINSUR		0.0%	10%	Record Date	30-Jul-23
CNATEX		0.0%	0%	Record Date	31-Jul-23
CNATEX		0.0%	0%	Record Date	31-Jul-23
CNATEX		0.0%	0%	Record Date	31-Jul-23
CNATEX		0.0%	0%	Record Date	31-Jul-23
CNATEX		0.0%	0%	Record Date	31-Jul-23
PURABIGEN		3.0%	0%	Record Date	6-Aug-23
RUPALILIFE		0.0%	11%	Record Date	17-Aug-23

#### Important DSE News

##### UTTARABANK

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.90 for April-June 2023 as against Tk. 1.38 for April-June 2022; Consolidated EPS was Tk. 1.64 for January-June 2023 as against Tk. 2.00 for January-June 2022. Consolidated NOCFPS was Tk. (6.73) for January-June 2023 as against Tk. (11.23) for January-June 2022. Consolidated NAV per share was Tk. 28.31 as on June 30, 2023 and Tk. 26.21 as on June 30, 2022.

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Uttara Bank PLC.' instead of 'Uttara Bank Limited' with effect from July 26, 2023. Other things (except name) will remain unchanged.

##### ASIANS

**(Q2 Un-audited):** EPS was Tk. 1.22 for April-June 2023 as against Tk. 0.87 for April-June 2022; EPS was Tk. 1.43 for January-June 2023 as against Tk. 1.42 for January-June 2022. NOCFPS was Tk. 1.81 for January-June 2023 as against Tk. 2.28 (restated) for January-June 2022. NAV per share was Tk. 27.29 as on June 30, 2023 and Tk. 26.42 as on June 30, 2022.

##### ABBANK

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.31 for April-June 2023 as against Tk. 0.23 for April-June 2022; Consolidated EPS was Tk. 0.43 for January-June 2023 as against Tk. 0.41 for January-June 2022. Consolidated NOCFPS was Tk. (1.99) for January-June 2023 as against Tk. 0.41 for January-June 2022. Consolidated NAV per share was Tk. 30.06 as on June 30, 2023 and Tk. 29.66 as on June 30, 2022.

##### UCB

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.35 for April-June 2023 as against Tk. 0.62 (restated) for April-June 2022; Consolidated EPS was Tk. 0.68 for January-June 2023 as against Tk. 0.85 (restated) for January-June 2022. Consolidated NOCFPS was Tk. 28.95 for January-June 2023 as against Tk. (8.77) (restated) for January-June 2022. Consolidated NAV per share was Tk. 29.09 as on June 30, 2023 and Tk. 27.32 (restated) as on June 30, 2022.

##### MIRACLEIND

Mr. Md. Wahiduzzaman Chowdhury, one of the Directors of the company has further informed that he has completed his sale of 10,00,000 shares of the Company at prevailing market price through Chittagong Stock Exchange PLC as per declaration news disseminated by DSE on 17.07.2023.

##### NRBCBANK

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.511 for January-June 2023 as against Tk. 0.734 for January-June 2022. Consolidated NOCFPS was Tk. 8.754 for January-June 2023 as against Tk. 11.786 for January-June 2022. Consolidated NAV per share was Tk. 15.84 as on June 30, 2023 and Tk. 16.01 as on December 31, 2022. The company has further informed that Consolidated EPS was Tk. (0.512) for April-June 2023 as against Tk. (0.065) for April-June 2022. The comparative figures of the corresponding previous period are restated.

##### PURABIGEN

Refer to the earlier news disseminated by DSE on 05.07.2023 regarding Stock Dividend for the year ended December 31, 2022, the Company has further informed that BSEC has accorded consent for issuance of 3% Stock Dividend for the year ended December 31, 2022. The company has fixed the Record date on 06.08.2023 for entitlement of the aforesaid Bonus Shares.

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**OLYMPIC**

The Company has informed that the Board of Directors has appointed Mr. Aziz Mohammad Bhai as the Chairman of the Board of Directors and Mrs. Nurjehan Hudda, as the Acting Managing Director of the company with immediate effect.

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