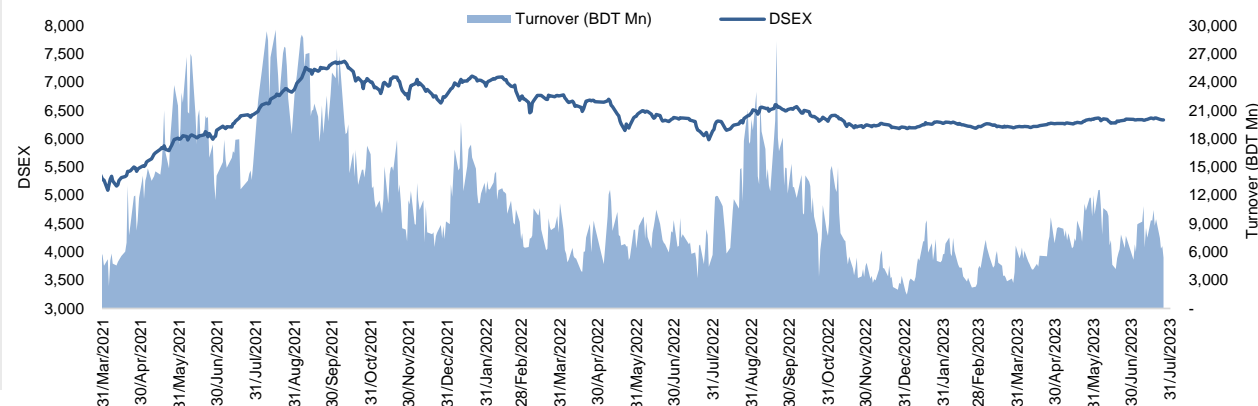


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.02%) gained 1.49 points and closed at 6,332.52. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (-0.06%) closed at 2,160.44, 1,373.21, and 1,210.52 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.09% followed by Bank (+0.07%), Fuel & Power (+0.02%), NBF1 (+0.02%). Food & Allied experienced the highest loss of 0.05% followed by Pharmaceutical (-0.03%), Telecommunication (0.00%). Block trades contributed 3.9% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (-1.5%) was the most traded share with a turnover of BDT 288 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,332.52	6,331.03	+1.49	+0.02%	+2.0%
DS30	2,160.44	2,162.34	-1.90	-0.09%	-1.6%
DSES	1,373.21	1,373.13	+0.08	+0.01%	+1.1%
CDSET	1,210.52	1,211.19	-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	7,640,264	7,633,117	+0.1%
	Mn USD	70,246	70,180	
Turnover	Mn BDT	5,389	6,610	-18.5%
	Mn USD	50	61	
Volume	Mn Shares	119	137	-13.1%
No. of Trade		129,464	159,582	-18.9%

* Average Interbank Exchange Rate is BDT 108.77 as of Jul 25, 2023

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Figure: Sectorial Turnover (BDT Mn)

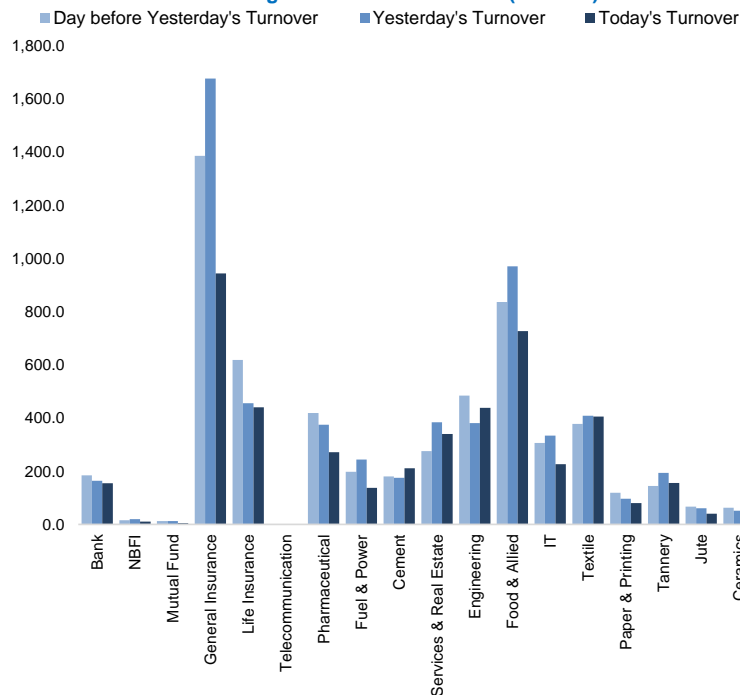
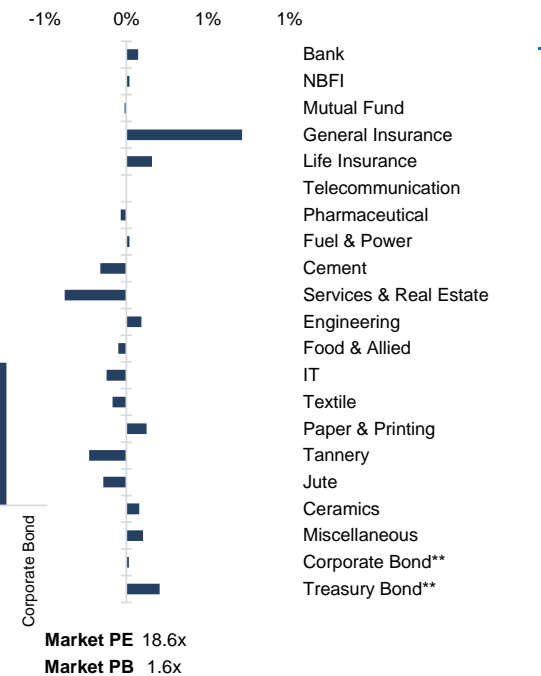


Figure: Sectorial Mcap Change



* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and 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	1,458	1,457	+1.05	+0.07%	35	687,335	9.3%	155.3	3.0%	12.5x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,922	1,922	+0.35	+0.02%	23	187,055	2.5%	10.3	0.2%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	833	833	-0.09	-0.01%	37	37,660	0.5%	4.7	0.1%	NM	0.7x	BATBC	280,098	6.1%	4.0	15.4x	6.2x
General Insurance	3,592	3,567	+25.30	+0.71%	42	104,842	1.4%	944.2	18.2%	19.2x	1.6x	SQURPHARMA	186,155	4.1%	32.5	9.9x	1.7x
Life Insurance	2,832	2,828	+4.46	+0.16%	15	79,168	1.1%	439.9	8.5%	NM	NM	ROBI	157,138	3.4%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	0.5	0.0%	15.6x	4.3x	RENATA	139,689	3.1%	0.3	38.0x	4.6x
Pharmaceutical	3,703	3,704	-1.29	-0.03%	34	718,248	9.7%	271.8	5.2%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,699	1,699	+0.32	+0.02%	23	448,273	6.0%	137.4	2.7%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,576	2,581	-4.12	-0.16%	7	123,744	1.7%	210.7	4.1%	27.3x	2.7x	BERGERPBL	81,472	1.8%	0.2	27.1x	6.3x
Services & Real Esta	1,989	1,997	-7.54	-0.38%	8	78,583	1.1%	340.1	6.6%	26.7x	1.0x	LHBL	79,554	1.7%	57.6	13.5x	4.0x
Engineering	4,514	4,510	+4.17	+0.09%	42	529,829	7.1%	438.4	8.5%	69.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,539	21,550	-10.52	-0.05%	21	398,554	5.4%	727.4	14.0%	20.0x	7.4x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,190	3,194	-3.86	-0.12%	11	41,593	0.6%	226.7	4.4%	29.1x	3.0x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,642	1,644	-1.39	-0.08%	58	171,982	2.3%	405.3	7.8%	80.2x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,660	10,647	+13.26	+0.12%	6	41,072	0.6%	80.3	1.6%	39.6x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.9x	0.8x
Tannery	3,266	3,273	-7.43	-0.23%	6	34,492	0.5%	156.3	3.0%	49.7x	3.4x	DUTCHBANGL	44,203	1.0%	1.6	7.6x	1.0x
Jute	16,682	16,706	-23.52	-0.14%	3	4,081	0.1%	39.9	0.8%	NM	-1416.7x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	685	684	+0.54	+0.08%	5	31,672	0.4%	30.4	0.6%	52.5x	1.9x	UNILEVERCL	39,349	0.9%	1.0	44.7x	13.1x
Miscellaneous	4,159	4,155	+4.29	+0.10%	14	226,471	3.1%	536.4	10.4%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.3	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%	0.0	12.1x	0.9x
Treasury Bond**	89	89	+0.18	+0.20%	232	2,854,101	38.5%	24.8	0.5%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
WMSHIPYARD	13.6	+9.7%	67.9	NM	0.6x
OAL	14.0	+9.4%	51.2	NM	1.1x
MEGHNAINS	54.0	+7.8%	90.0	35.1x	3.5x
EASTERNINS	54.8	+6.4%	15.2	16.5x	1.0x
KPPL	13.6	+6.3%	14.7	NM	NM
DESHBANDHU	29.1	+6.2%	77.1	83.1x	1.6x
GENNEXT	7.2	+5.9%	54.5	NM	1x
CENTRALPHL	13.4	+5.5%	18.3	NM	2.3x
CRYSTALINS	62.4	+5.4%	174.5	19.2x	2.5x
YPL	29.5	+5.4%	102.4	NM	5.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AL-HAJTEX	175.7	-5.1%	15.5	NM	19.4x
PREMIERCEM	63.1	-4.8%	24.1	NM	1x
HEIDELBCEM	289.1	-3.2%	126.7	36.3x	4.3x
UNITEDINS	43.0	-2.9%	3.6	27.0x	1.3x
MONNOAGML	945.0	-2.8%	16.3	NM	5.4x
ADNTEL	141.3	-2.8%	116.0	36.7x	5.1x
RSRMSTEEL	17.5	-2.8%	1.4	NM	0.4x
AZIZPIPES	118.4	-2.7%	22.6	NM	NM
PARAMOUNT	46.4	-2.5%	32.2	31.1x	1.7x
ORIONINFU	365.8	-2.3%	102.2	NM	26.5x

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	4.2%	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%	9.0x	0.9x
ISLAMIBANK	30,494	1.7%	8.9x	0.8x
LHBL	28,936	1.7%	13.5x	4.0x
NBL	19,116	1.1%	NM	0.8x
PUBALIBANK	18,880	1.1%	4.8x	0.6x
CITYBANK	18,235	1.0%	5.5x	0.7x
OLYMPIC	16,995	1.0%	17.3x	2.9x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	14,417	0.8%	15.0x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
PRIMEBANK	13,629	0.8%	5.0x	0.7x
SEAPEARL	13,553	0.8%	33.0x	13.2x
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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SEAPEARL	227.4	-1.5%	287.8	33.0x	13.2x
FUWANGFOO	35.2	+3.2%	258.9	NM	8.9x
BSC	118.7	-	238.0	7.6x	1.5x
KBPPWBIL	34.4	+4.2%	203.2	NM	2.9x
CRYSTALINS	62.4	+5.4%	174.5	19.2x	2.5x
ASIANS	56.4	+5.0%	158.4	26.9x	2.1x
DELTALIFE	156.1	-1.2%	144.1	NM	NM
LEGACYFOOT	131.8	-1.3%	142.4	NM	14.8x
RUPALILIFE	128.6	+2.6%	135.5	NM	NM
HEIDELBCEM	289.1	-3.2%	126.7	36.3x	4.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
KDSALTD	76.0	76.0	2.0	295	22.42
EMERALDOIL	145.0	145.0	4.0	129	18.71
GEMINISEA	803.0	801.0	2.0	15	11.70
PTL	84.2	69.3	12.0	129	9.53
ORIONINFU	407.1	407.1	2.0	21	8.42
BATBC	482.0	479.8	13.0	16	7.56
PRAGATILIF	135.0	135.0	1.0	49	6.58
NBL	8.0	8.0	8.0	768	6.14
INTRACO	47.0	46.9	3.0	123	5.78
AL-HAJTEX	179.0	177.0	2.0	32	5.69

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
KDSALTD	76.0	76.0	22.4	295	2
EMERALDOIL	145.0	145.0	18.7	129	4
GEMINISEA	803.0	801.0	11.7	15	2
PTL	84.2	69.3	9.5	129	12
ORIONINFU	407.1	407.1	8.4	21	2
BATBC	482.0	479.8	7.6	16	13
PRAGATILIF	135.0	135.0	6.6	49	1
NBL	8.0	8.0	6.1	768	8
INTRACO	47.0	46.9	5.8	123	3
AL-HAJTEX	179.0	177.0	5.7	32	2
GP	261.9	261.6	5.5	21	5
SONALIPAPR	569.0	569.0	5.2	9	4
SIBL	11.2	11.0	4.4	400	5
FORTUNE	75.7	68.2	4.2	57	3
EBL	26.7	26.5	4.0	152	7
BRACBANK	32.3	32.3	3.7	116	3
MEGHNAINS	52.0	52.0	3.7	71	1
DUTCHBANGL	65.0	64.5	3.7	56	3
RUPALILIFE	120.0	120.0	3.6	30	2
MARICO	2,350.0	2,350.0	3.5	2	2
MIDLANDBNK	14.4	14.4	3.2	223	1
FUWANGFOOD	33.5	33.5	3.0	90	1
Total			208.3		153

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

TAKAFULINS

(Q2 Un-audited): EPS was Tk. 0.32 for April-June 2023 as against Tk. 0.34 for April-June 2022; EPS was Tk. 0.69 for January-June 2023 as against Tk. 0.70 for January-June 2022. NOCFPS was Tk. 1.42 for January-June 2023 as against Tk. 0.83 for January-June 2022. NAV per share was Tk. 18.46 as on June 30, 2023 and Tk. 19.42 as on June 30, 2022.

BGIC

(Q2 Un-audited): EPS was Tk. 0.54 for April-June 2023 as against Tk. 0.55 for April-June 2022; EPS was Tk. 1.27 for January-June 2023 as against Tk. 1.25 for January-June 2022. NOCFPS was Tk. 1.16 for January-June 2023 as against Tk. 1.15 for January-June 2022. NAV per share was Tk. 20.85 as on June 30, 2023 and Tk. 20.41 as on June 30, 2022.

PARAMOUNT

(Q2 Un-audited): EPS was Tk. 0.38 for April-June 2023 as against Tk. 0.64 for April-June 2022; EPS was Tk. 1.12 for January-June, 2023 as against Tk. 1.50 for January-June, 2022. NOCFPS was Tk. 0.78 for January-June 2023 as against Tk. 2.50 for January-June 2022. NAV per share was Tk. 26.91 as on June 30, 2023 and Tk. 26.60 as on June 30, 2022.

SBACBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.23 for April-June 2023 as against Tk. 0.10 (restated) for April-June 2022; Consolidated EPS was Tk. 0.41 for January-June 2023 as against Tk. 0.31 (restated) for January-June 2022. Consolidated NOCFPS was Tk. 3.18 for January-June 2023 as against Tk. (1.12) (restated) for January-June 2022. Consolidated NAV per share was Tk. 13.25 as on June 30, 2023 and Tk. 13.27 (restated) as on December 31, 2022.

CONTININS

(Q2 Un-audited): EPS was Tk. 0.52 for April-June 2023 as against Tk. 0.54 for April-June 2022; EPS was Tk. 1.08 for January-June 2023 as against Tk. 1.04 for January-June 2022. NOCFPS was Tk. 0.18 for January-June 2023 as against Tk. 0.23 for January-June 2022. NAV per share was Tk. 21.45 as on June 30, 2023 and Tk. 20.40 as on June 30, 2022.

HEIDELBCEM

(Q2 Un-audited): EPS was Tk. 1.61 for April-June 2023 as against Tk. (0.66) for April-June 2022; EPS was Tk. 8.46 for January-June 2023 as against Tk. (3.63) for January-June 2022. NOCFPS was Tk. 40.68 for January-June 2023 as against Tk. (5.34) for January-June 2022. NAV per share was Tk. 67.53 as on June 30, 2023 and Tk. 60.07 as on December 31, 2022.

CITYBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.23 for April-June 2023 as against Tk. 1.07 (restated) for April-June 2022; Consolidated EPS was Tk. 1.97 for January-June 2023 as against Tk. 1.81 (restated) for January-June 2022. Consolidated NOCFPS was Tk. 1.23 for January-June 2023 as against Tk. (6.74) (restated) for January-June 2022. Consolidated NAV per share was Tk. 29.96 as on June 30, 2023 and Tk. 28.21 (restated) as on December 31, 2022.

PEOPLESINS

(Q2 Un-audited): EPS was Tk. 0.54 for April-June 2023 as against Tk. 0.54 for April-June 2022; EPS was Tk. 1.06 for January-June 2023 as against Tk. 1.12 for January-June 2022. NOCFPS was Tk. 0.04 for January-June 2023 as against Tk. 1.31 for January-June 2022. NAV per share was Tk. 32.51 as on June 30, 2023 and Tk. 31.20 as on June 30, 2022.

GIB

(Q2 Un-audited): EPS was Tk. 0.13 for April-June 2023 as against Tk. 0.30 (restated) for April-June 2022; EPS was Tk. 0.74 for January-June 2023 as against Tk. 0.50 (restated) for January-June 2022. NOCFPS was Tk. (10.51) for January-June 2023 as against Tk. 6.31 (restated) for January-June 2022. NAV per share was Tk. 14.51 as on June 30, 2023 and Tk. 8.74 (restated) as on June 30, 2022.

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NBL

(Q2 Un-audited): Consolidated EPS was Tk. (0.98) for April-June 2023 as against Tk. (0.36) (restated) for April-June 2022; Consolidated EPS was Tk. (1.95) for January-June 2023 as against Tk. (0.54) (restated) for January-June 2022. NOCFPS was Tk. (3.89) for January-June 2023 as against Tk. (4.79) for January-June 2022. Consolidated NAV per share was Tk. 10.94 as on June 30, 2023 and Tk. 15.49 as on June 30, 2022.

OIMEX

The company has informed that the Board of Directors of the Company in its meeting held on July 25, 2023 took the following decisions: "Resolved that an amount of Tk. 60,000,000.00 (Six Crore) divided into 6,000,000 (Sixty lac) Ordinary shares at Tk. 10 each will be raised as Paid-up Capital of the Company from the existing directors as share money deposit." The above proposal has been submitted earlier to BSEC after receiving the letter from Bangladesh Securities and Exchange Commission ref: BSEC/SRMIC/100-2017/239, dated 12 June 2022. The aforesaid proposal has not been duly accepted by BSEC due to non-compliance with articles 13 and 53 of the memorandums exposed which are as follows- Article 13. Where the directors decide to increase the capital of the company by the issue of further shares, such shares shall be offered to members in proportion to the existing shares held by each member. Article 53. All new shares shall be offered in first instance and either at par or at a premium to all the then holders of all classes of shares in the proportion of the amount of capital held by them. As a result, the above-said proposal has been reconsidered and submitted again to BSEC to get a proper review complying with articles 13 and 53 of the memorandums exposed.

BIFC

The company has informed that the Board of Directors has appointed Mr. Md. Anwarullah Sadeq as Managing Director (Current Charge) of the company with effect from July 03, 2023.

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