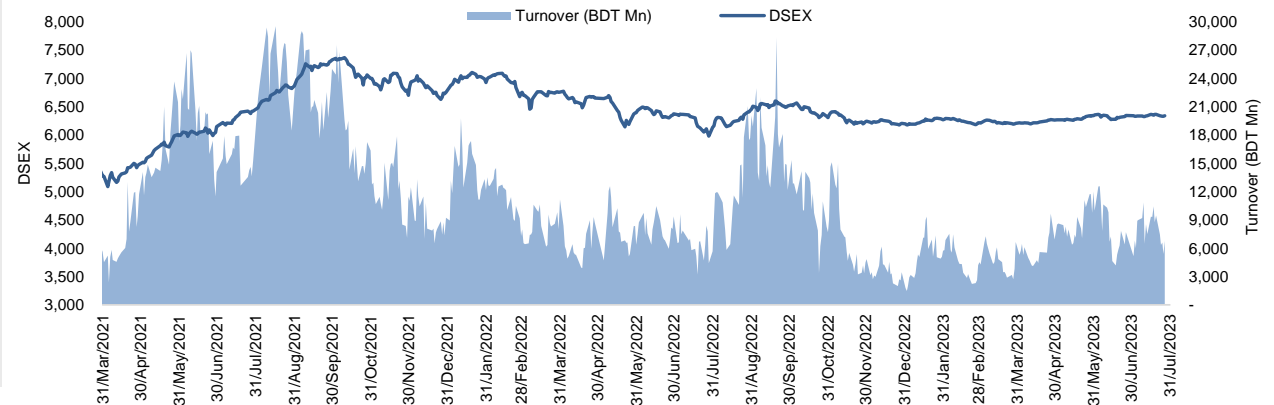


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.11%) gained 6.99 points and closed at 6,339.51. The blue-chip index DS30 (-0.03%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (-0.02%) closed at 2,159.87, 1,373.96, and 1,210.28 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.09% followed by Food & Allied (+0.08%), Fuel & Power (+0.01%). Pharmaceutical experienced the highest loss of 0.12% followed by Bank (-0.05%), NBF1 (0.00%). Block trades contributed 4.5% of the overall market turnover. Fu Wang Food Ltd. (+8.2%) was the most traded share with a turnover of BDT 403 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,339.51	6,332.52	+6.99	+0.11%	+2.1%
DS30	2,159.87	2,160.44	-0.58	-0.03%	-1.6%
DSES	1,373.96	1,373.21	+0.75	+0.05%	+1.1%
CDSET	1,210.28	1,210.52	-0.24	-0.02%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	80	85	180	345
A Category (Equity)	51	48	118	217
B Category (Equity)	23	29	53	105
N Category (Equity)	2	1	1	4
Z Category (Equity)	4	7	8	19
Mutual Funds	0	3	17	20
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,638,988	7,640,264	-0.0%
	Mn USD	70,082	70,094	
Turnover	Mn BDT	6,772	5,389	+25.6%
	Mn USD	62	49	
Volume	Mn Shares	146	119	+22.9%
No. of Trade		158,886	129,464	+22.7%

* Average Interbank Exchange Rate is BDT 109.00 as of Jul 26, 2023

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Figure: Sectorial Turnover (BDT Mn)

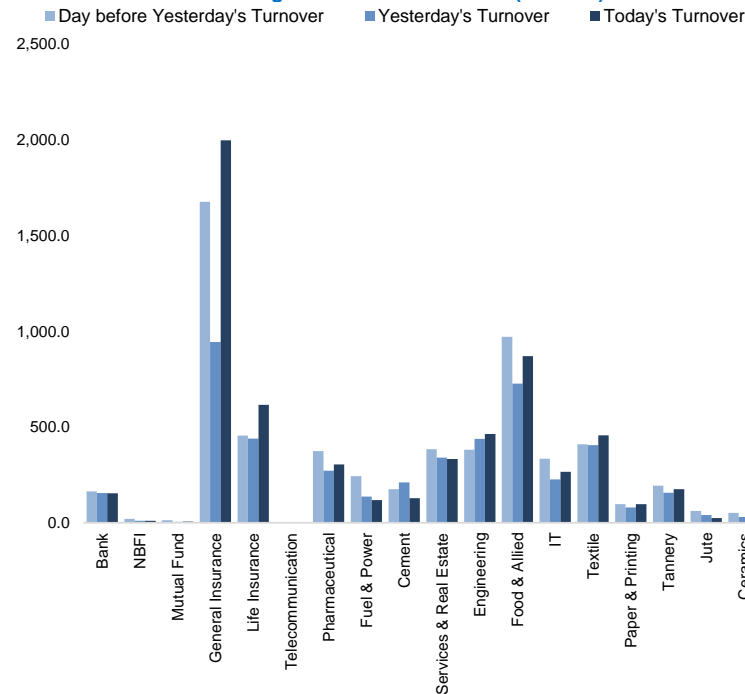
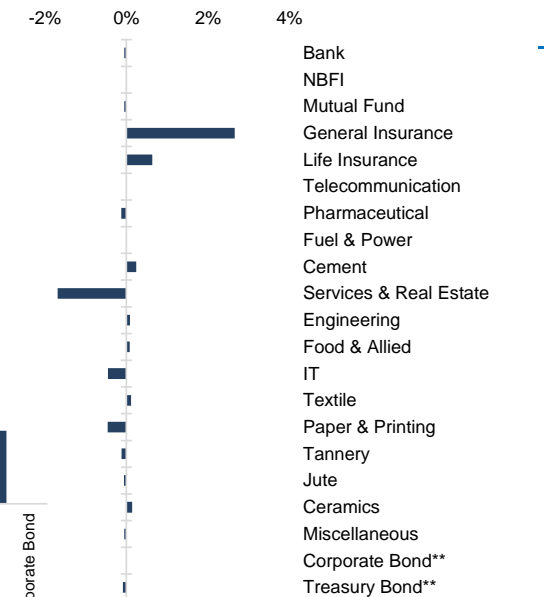


Figure: Sectorial Mcap Change



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	1,457	1,458	-0.73	-0.05%	35	686,988	9.3%	153.5	2.4%	12.5x	0.7x	GP	386,996	8.5%	0.5	11.9x	7.3x
NBFI	1,922	1,922	-	-	23	187,055	2.5%	10.6	0.2%	NM	4.5x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	833	-0.43	-0.05%	37	37,641	0.5%	5.8	0.1%	NM	0.7x	BATBC	280,098	6.1%	0.9	15.4x	6.2x
General Insurance	3,688	3,592	+95.51	+2.66%	42	107,630	1.5%	1,998.0	30.9%	19.8x	1.7x	SQURPHARMA	186,155	4.1%	47.8	9.9x	1.7x
Life Insurance	2,850	2,832	+18.04	+0.64%	15	79,673	1.1%	616.3	9.5%	NM	NM	ROBI	157,138	3.4%	0.5	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	1.1	0.0%	15.5x	4.5x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,698	3,703	-4.60	-0.12%	34	717,356	9.7%	305.0	4.7%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,700	1,699	+0.20	+0.01%	23	448,326	6.0%	118.3	1.8%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,583	2,576	+6.34	+0.25%	7	124,048	1.7%	128.1	2.0%	27.3x	2.7x	BERGERPBL	81,310	1.8%	0.8	27.0x	6.3x
Services & Real Esta	1,955	1,989	-33.57	-1.69%	8	77,257	1.0%	332.9	5.1%	26.3x	1.0x	LHBL	80,019	1.8%	44.8	13.6x	4.0x
Engineering	4,518	4,514	+3.91	+0.09%	42	530,288	7.2%	463.7	7.2%	69.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,556	21,539	+17.24	+0.08%	21	398,873	5.4%	870.5	13.5%	20.1x	7.4x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,176	3,190	-14.39	-0.45%	11	41,405	0.6%	265.9	4.1%	29.0x	3.0x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,644	1,642	+1.94	+0.12%	58	172,185	2.3%	456.9	7.1%	80.3x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,611	10,660	-48.55	-0.46%	6	40,885	0.6%	97.2	1.5%	39.4x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,262	3,266	-3.74	-0.11%	6	34,452	0.5%	176.0	2.7%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,672	16,682	-9.90	-0.06%	3	4,079	0.1%	25.2	0.4%	NM	-1415.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	686	685	+1.00	+0.15%	5	31,719	0.4%	60.0	0.9%	52.6x	1.9x	UNILEVERCL	39,239	0.9%	1.4	44.6x	13.0x
Miscellaneous	4,157	4,159	-2.11	-0.05%	14	226,356	3.1%	380.8	5.9%	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%	0.0	12.1x	0.9x
Treasury Bond**	89	89	-0.08	-0.09%	232	2,851,655	38.5%	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
ASIAPACINS	60.5	+10.0%	101.5	25.3x	2.6x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOD	38.1	+8.2%	403.1	NM	9.6x
DGIC	35.3	+10.0%	31.1	39.2x	3.0x	BATBC	74,086	4.2%	15.4x	6.2x	DELTALIFE	159.0	+1.9%	298.9	NM	NM
FUWANGFOOD	38.1	+8.2%	403.1	NM	9.6x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	218.9	-3.7%	246.7	31.7x	12.7x
AL-HAJTEX	188.1	+7.1%	67.3	NM	20.7x	RENATA	68,042	3.9%	38.0x	4.6x	KBPPWBIL	34.8	+1.2%	201.7	NM	2.9x
JANATAINS	41.9	+6.9%	115.4	29.8x	2.7x	BXPHARMA	45,564	2.6%	14.6x	1.5x	ASIANS	57.9	+2.7%	174.7	27.6x	2.1x
CENTRALINS	40.0	+6.4%	19.2	21.9x	0.8x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	CONTININS	43.6	+2.8%	173.2	72.7x	2.0x
REPUBLIC	40.2	+6.3%	37.6	20.1x	2x	GP	38,700	2.2%	11.9x	7.3x	CRYSTALINS	65.8	+5.4%	169.6	20.2x	2.6x
CRYSTALINS	65.8	+5.4%	169.6	20.2x	2.6x	BRACBANK	30,964	1.8%	9.0x	0.9x	LEGACYFOOT	136.3	+3.4%	155.2	NM	15.3x
WMSHIPYARD	14.3	+5.1%	111.1	NM	0.7x	ISLAMIBANK	30,494	1.7%	8.4x	0.7x	GEMINISEA	802.6	+0.0%	152.7	38.3x	31.6x
DHAKAINS	58.1	+5.1%	31.3	19.2x	1.7x	LHBL	28,936	1.7%	13.6x	4.0x	UNIONINS	61.5	+3.7%	138.0	29.7x	3.5x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
NAVANAPHAR	98.6	-5.5%	81.1	22.4x	2.4x	PUBALIBANK	18,880	1.1%	4.6x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	218.9	-3.7%	246.7	31.7x	13x	CITYBANK	18,235	1.0%	5.5x	0.7x	EMERALDOIL	148.0	136.5	3.0	569	78.08
AIL	88.5	-3.7%	124.6	55.3x	3.9x	OLYMPIC	16,995	1.0%	17.4x	2.9x	AL-HAJTEX	180.3	175.0	14.0	383	67.54
NTC	389.4	-3.5%	2.4	NM	192.8x	ROBI	15,714	0.9%	69.8x	2.5x	SONALIPAPR	661.0	640.0	3.0	69	44.33
MEGHNA PET	33.3	-3.5%	3.8	NM	NM	ALARABANK	14,417	0.8%	15.0x	1.1x	BATBC	481.3	479.8	10.0	30	14.53
AAMRATECH	33.0	-2.9%	23.7	36.4x	3.1x	BSRMLTD	14,210	0.8%	NM	0.7x	SALVOCHEM	64.0	64.0	1.0	165	10.56
KPPL	13.2	-2.9%	24.0	NM	NM	PRIMEBANK	13,629	0.8%	5.1x	0.7x	NAVANAPHAR	108.0	108.0	1.0	97	10.51
GENNEXT	7.0	-2.8%	47.7	NM	0.6x	SEAPEARL	13,553	0.8%	31.7x	12.7x	CRYSTALINS	68.0	60.0	4.0	108	6.62
MIDLANDBNK	14.2	-2.7%	57.1	14.7x	1.1x	UPGDCL	13,547	0.8%	16.7x	4.4x	PTL	71.5	69.3	7.0	65	4.52
YPL	28.7	-2.7%	77.6	NM	5.4x						UTTARABANK	21.2	20.0	2.0	181	3.72
											BEACHHATCH	52.7	52.2	2.0	67	3.49

* 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

* 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
EMERALDOIL	148.0	136.5	78.1	569	3
AL-HAJTEX	180.3	175.0	67.5	383	14
SONALIPAPR	661.0	640.0	44.3	69	3
BATBC	481.3	479.8	14.5	30	10
SALVOCHEM	64.0	64.0	10.6	165	1
NAVANAPHAR	108.0	108.0	10.5	97	1
CRYSTALINS	68.0	60.0	6.6	108	4
PTL	71.5	69.3	4.5	65	7
UTTARABANK	21.2	20.0	3.7	181	2
BEACHHATCH	52.7	52.2	3.5	67	2
NBL	8.0	8.0	3.2	400	4
FORTUNE	75.5	68.2	3.2	45	3
MARICO	2,400.0	2,380.0	3.1	1	5
BXPHERMA	132.1	131.6	2.9	22	5
MALEKSPIN	25.5	24.4	2.9	117	5
GP	261.8	261.6	2.9	11	3
MIDLANDBNK	15.9	15.9	2.7	170	1
SILVAPHL	21.6	19.5	2.7	127	2
DELTALIFE	166.0	166.0	2.5	15	1
PREMIERCEM	65.0	65.0	2.5	38	1
BRACBANK	32.3	32.3	2.5	76	2
ACFL	23.9	23.9	2.3	98	1
Total			305.7		120

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

LANKABAFIN

(Q2 Un-audited): Consolidated EPS was Tk. 0.17 for April-June 2023 as against Tk. 0.15 for April-June 2022; Consolidated EPS was Tk. 0.32 for January-June 2023 as against Tk. 0.58 for January-June 2022. Consolidated NOCFPS was Tk. 1.42 for January-June 2023 as against Tk. (3.67) for January-June 2022. Consolidated NAV per share was Tk. 18.53 as on June 30, 2023 and Tk. 20.02 as on December 31, 2022.

MTB

(Q2 Un-audited): Consolidated EPS was Tk. 0.41 for April-June 2023 as against Tk. 0.71 (restated) for April-June 2022; Consolidated EPS was Tk. 1.10 for January-June 2023 as against Tk. 1.36 (restated) for January-June 2022. Consolidated NOCFPS was Tk. 13.22 for January-June 2023 as against Tk. 4.42 (restated) for January-June 2022. Consolidated NAV per share was Tk. 22.75 as on June 30, 2023 and Tk. 21.70 (restated) as on December 31, 2022.

ACI

Board of Directors of the Company has approved an investment proposal of BDT 10 (Ten) Crore in an upcoming digital bank named and titled 'Kori Digital Plc' subject to the approval from the concerned authorities. The company will secure 5% share i.e. 10,000,000 ordinary shares of TK. 10 each with this investment.

FIRSTSBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.78 for April-June 2023 as against Tk. 0.34 (Restated) for April-June 2022; Consolidated EPS was Tk. 1.15 for January-June 2023 as against Tk. 0.87 (Restated) for January-June 2022. Consolidated NOCFPS was Tk. (28.52) for January-June 2023 as against Tk. 11.01(Restated) for January-June 2022. Consolidated NAV per share was Tk. 22.41 as on June 30, 2023 and Tk. 19.81 (Restated) as on June 30, 2022. (cont.)

ROBI

(Q2 Un-audited): Consolidated EPS was Tk. 0.05 for April - June 2023 as against Tk. (0.02) for April - June 2022; Consolidated EPS was Tk. 0.13 for January - June 2023 as against Tk. 0.05 for January - June 2022; Consolidated NOCFPS was Tk. 3.41 for January - June 2023 as against Tk. 3.03 for January - June 2022. Consolidated NAV per share was Tk. 12.24 as on June 30, 2023 and Tk. 12.49 as on June 30, 2022.

KARNAPHULI

(Q2 Un-audited): EPS was Tk. 0.44 for April-June 2023 as against Tk. 0.57 for April-June 2022; EPS was Tk. 1.07 for January-June 2023 as against Tk. 1.16 for January-June 2022. NOCFPS was Tk. 1.14 for January-June 2023 as against Tk. 1.55 for January-June 2022. NAV per share was Tk. 21.78 as on June 30, 2023 and Tk. 21.35 as on June 30, 2022.

PUBALIBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.38 for April - June 2023 as against Tk. 1.17 for April - June 2022; Consolidated EPS was Tk. 2.71 for January - June 2023 as against Tk. 2.36 for January - June 2022; Consolidated NOCFPS was Tk. (2.28) for January - June 2023 as against Tk. (7.02) for January - June 2022. Consolidated NAV per share was Tk. 42.74 as on June 30, 2023 and Tk. 38.67 as on June 30, 2022.

ASIAPACINS

(Q2 Un-audited): EPS was Tk. 0.89 for April-June 2023 as against Tk. 0.93 for April-June 2022; EPS was Tk. 2.04 for January-June 2023 as against Tk. 2.02 for January-June 2022. NOCFPS was Tk. 1.32 for January-June 2023 as against Tk. 1.71 for January-June 2022. NAV per share was Tk. 23.07 as on June 30, 2023 and Tk. 23.99 as on June 30, 2022.

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PROVATIINS

(Q2 Un-audited): EPS was Tk. 0.32 for April-June 2023 as against Tk. 0.54 (restated) for April-June 2022; EPS was Tk. 1.04 for January-June 2023 as against Tk. 1.93 (restated) for January-June 2022. NOCFPS was Tk. 0.73 for January-June 2023 as against Tk. 2.47 for January-June 2022. NAV per share was Tk. 21.08 as on June 30, 2023 and Tk. 23.99 as on June 30, 2022.

NITOLINS

(Q2 Un-audited): EPS was Tk. 0.41 for April-June 2023 as against Tk. 0.42 for April-June 2022; EPS was Tk. 0.90 for January-June 2023 as against Tk. 1.07 for January-June 2022. NOCFPS was Tk. 0.79 for January-June 2023 as against Tk. 0.88 for January-June 2022. NAV per share was Tk. 30.94 as on June 30, 2023 and Tk. 28.98 as on June 30, 2022.

SHAHJABANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.50 for April-June 2023 as against Tk. 1.41 for April-June 2022; Consolidated EPS was Tk. 2.45 for January-June 2023 as against Tk. 2.32 for January-June 2022; Consolidated NOCFPS was Tk. 6.48 for January-June 2023 as against Tk. 5.60 for January-June 2022. Consolidated NAV per share was Tk. 20.82 as on June 30, 2023 and Tk. 19.01 as on June 30, 2022.

SOUTHEASTB

(Q2 Un-audited): Consolidated EPS was Tk. 0.31 for April-June 2023 as against Tk. 1.21 for April-June 2022; Consolidated EPS was Tk. 1.50 for January-June 2023 as against Tk. 2.46 for January-June 2022; Consolidated NOCFPS was Tk. 16.69 for January-June 2023 as against Tk. 2.46 for January-June 2022. Consolidated NAV per share was Tk. 26.36 as on June 30, 2023 and Tk. 26.88 as on June 30, 2022.

GLOBALINS

(Q2 Un-audited): EPS was Tk. 0.29 for April-June 2023 as against Tk. 0.46 for April-June 2022; EPS was Tk. 0.60 for January-June 2023 as against Tk. 0.85 for January-June 2022. NOCFPS was Tk. 0.54 for January-June 2023 as against Tk. 1.79 for January-June 2022. NAV per share was Tk. 14.40 as on June 30, 2023 and Tk. 14.22 as on June 30, 2022.

SONARBAINS

(Q2 Un-audited): Consolidated EPS was Tk. 0.29 for April-June 2023 as against Tk. 0.86 for April-June 2022; Consolidated EPS was Tk. 1.14 for January-June 2023 as against Tk. 1.68 for January-June 2022; Consolidated NOCFPS was Tk. 1.50 for January-June 2023 as against Tk. 2.81 for January-June 2022. Consolidated NAV per share was Tk. 23.22 as on June 30, 2023 and Tk. 21.93 as on June 30, 2022.

DUTCHBANGL

(Q2 Un-audited): EPS was Tk. 1.54 for April-June 2023 as against Tk. 2.02 (restated) for April-June 2022; EPS was Tk. 3.21 for January-June 2023 as against Tk. 3.33 (restated) for January-June 2022. NOCFPS was Tk. 23.54 for January-June 2023 as against Tk. 19.89 (restated) for January-June 2022. NAV per share was Tk. 57.12 as on June 30, 2023 and Tk. 51.25 (restated) as on June 30, 2022. NOCFPS increased mainly for increase of deposits from customers and increase of sale of trading securities.

MARICO

(Q1 Un-audited): EPS was Tk. 42.18 for April-June 2023 as against Tk. 32.67 for April-June 2022. NOCFPS was Tk. 51.08 for April-June 2023 as against Tk. 30.19 for April-June 2022. NAV per share was Tk. 156.03 as on June 30, 2023 and Tk. 73.03 as on June 30, 2022.

ISLAMIBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.78 for April-June 2023 as against Tk. 1.58 for April-June 2022; Consolidated EPS was Tk. 2.13 for January-June 2023 as against Tk. 2.10 for January-June 2022. Consolidated NOCFPS was Tk. (39.21) for January-June 2023 as against Tk. (12.29) for January-June 2022. Consolidated NAV per share was Tk. 44.06 as on June 30, 2023 and Tk. 41.73 as on June 30, 2022.

ACI

The company has informed that the Board of Directors of the Company has approved the formation of a new subsidiary company under the title of "ACI AVIONICS AND AIRLINES SERVICES LIMITED" having its authorized capital of BDT 50 (Fifty) Crore and a paid up capital of BDT 1 (One) Crore wherein the company shall hold 77% shares at the earliest convenience subject to the approval of concerned authorities.

CBLPBOND

The City Bank Limited, issuer of City Bank Perpetual Bond has informed that Record Date for the bond will be on August 17, 2023 for entitlement of coupon payments to be made on September 01, 2023 for the period from March 01, 2023 to August 31, 2023.

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