

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.19%) gained 12.11 points and closed at 6,311.61. The blue-chip index DS30 (+0.24%), the Shariah-based index DSES (+0.10%), and the large-cap index CDSET (-0.03%) closed at 2,146.79, 1,373.93, and 1,211.72 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.09% followed by Fuel & Power (+0.06%), Engineering (+0.02%), NBFI (+0.01%), Food & Allied (+0.00%), Telecommunication (0.00%), and Bank (-0.06%), respectively. Block trades contributed 5.7% of the overall market turnover. Fu Wang Food Ltd. (-0.5%) was the most traded share with a turnover of BDT 564 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,311.61	6,299.50	+12.11	+0.19%	+1.7%
DS30	2,146.79	2,141.61	+5.17	+0.24%	-2.2%
DSES	1,373.93	1,372.52	+1.41	+0.10%	+1.1%
CDSET	1,211.72	1,212.08	-0.36	-0.03%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	122	35	175	332
A Category (Equity)	83	14	119	216
B Category (Equity)	31	16	45	92
N Category (Equity)	3	0	1	4
Z Category (Equity)	5	5	10	20
Mutual Funds	3	0	22	25
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,766,674	7,760,576	
	Mn USD	70,935	70,879	+0.1%
Turnover	Mn BDT	6,107	4,562	+33.9%
	Mn USD	56	42	
Volume	Mn Shares	124	91	+36.9%
No. of Trade		138,589	105,825	+31.0%

\* Average Interbank Exchange Rate is BDT 109.49 as of Sep 03, 2023

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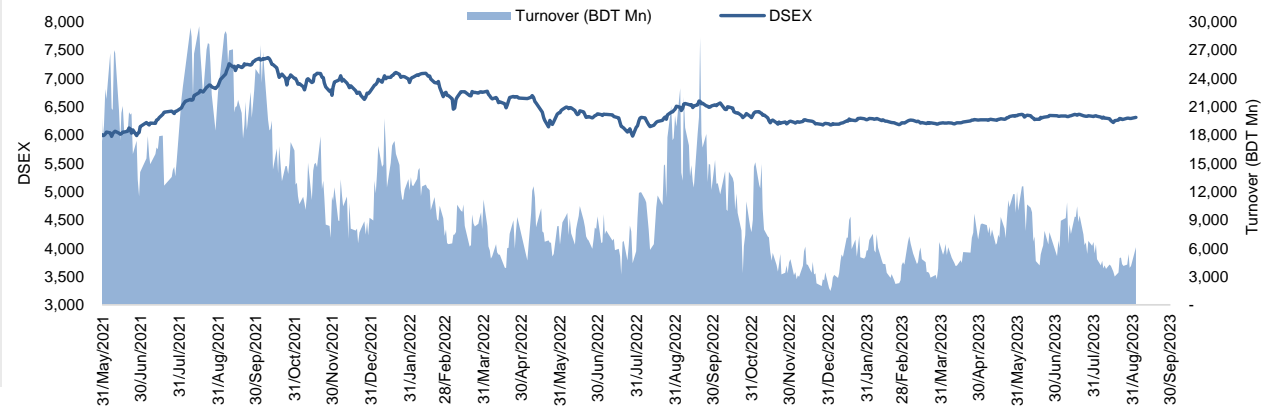


Figure: Sectorial Turnover (BDT Mn)

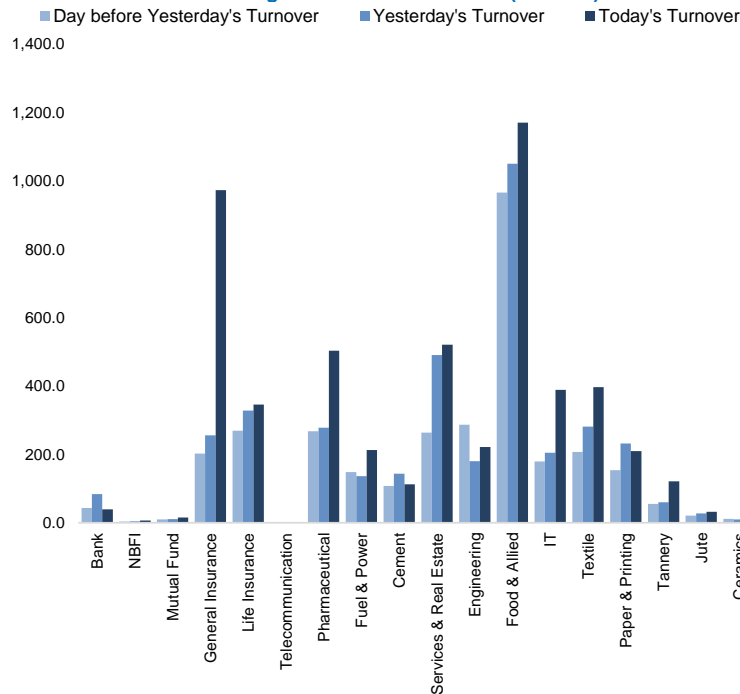
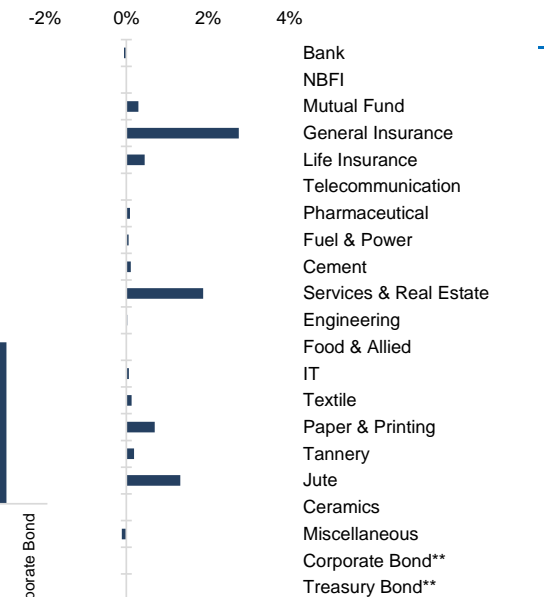


Figure: Sectorial Mcap Change



Market PE 18.5x

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	1,451	1,452	-0.84	-0.06%	35	684,062	9.3%	39.3	0.7%	12.1x	0.7x	GP	386,996	8.5%	0.3	11.9x	7.3x
NBFI	1,919	1,919	+0.15	+0.01%	23	186,724	2.5%	6.4	0.1%	NM	6.1x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	831	828	+2.44	+0.29%	37	37,571	0.5%	15.6	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.4x	6.2x
General Insurance	3,523	3,428	+94.50	+2.76%	42	102,820	1.4%	972.9	16.9%	19.1x	1.6x	SQURPHARM <sup>A</sup>	187,130	4.1%	20.2	9.9x	1.7x
Life Insurance	2,677	2,665	+12.03	+0.45%	15	74,828	1.0%	346.0	6.0%	NM	NM	ROBI	157,138	3.5%	0.1	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.6	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,731	3,728	+3.32	+0.09%	34	723,757	9.8%	503.8	8.7%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,703	1,702	+0.95	+0.06%	23	449,188	6.1%	212.4	3.7%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,584	2,581	+2.76	+0.11%	7	124,118	1.7%	112.3	1.9%	27.4x	2.7x	BERGERPBL	85,730	1.9%	0.4	28.0x	6.1x
Services & Real Esta	1,875	1,841	+34.64	+1.88%	8	74,086	1.0%	520.7	9.0%	24.7x	1.2x	LHBL	81,296	1.8%	75.8	13.8x	4.1x
Engineering	4,495	4,494	+1.05	+0.02%	42	527,571	7.2%	221.4	3.8%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,664	21,664	+0.18	+0.00%	21	400,866	5.4%	1,170.1	20.3%	20.2x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,184	3,182	+2.04	+0.06%	11	41,508	0.6%	388.5	6.7%	29.3x	3.0x	BRACBANK	57,596	1.3%	0.0	8.3x	0.9x
Textile	1,635	1,633	+2.12	+0.13%	58	171,134	2.3%	397.0	6.9%	79.8x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	11,064	10,987	+76.96	+0.70%	6	42,627	0.6%	209.5	3.6%	41.1x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.4x	0.7x
Tannery	3,230	3,224	+6.14	+0.19%	6	34,117	0.5%	121.6	2.1%	46.7x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,358	16,144	+214.26	+1.33%	3	4,002	0.1%	31.9	0.6%	NM	-1389.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	+0.08	+0.01%	5	31,450	0.4%	14.0	0.2%	53.4x	1.9x	UNILEVERCL	39,325	0.9%	1.2	45.5x	22.4x
Miscellaneous	4,228	4,232	-4.62	-0.11%	14	230,189	3.1%	472.4	8.2%	16.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,139	0.5%	1.4	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.01%	232	2,806,773	38.1%	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
EASTERNINS	53.7	+9.8%	19.2	17.3x	1.0x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOI	40.4	-0.5%	564.2	NM	10.2x
CRYSTALINS	67.8	+9.2%	296.4	20.9x	2.7x	BATBC	74,086	4.3%	15.4x	6.2x	EHL	102.0	+7.3%	303.2	13.8x	1.3x
SIMTEX	27.6	+8.7%	195.1	30.3x	1.2x	BEXIMCO	69,196	4.0%	12.0x	1.2x	CRYSTALINS	67.8	+9.2%	296.4	20.9x	2.7x
EHL	102.0	+7.3%	303.2	13.8x	1.3x	RENATA	68,042	3.9%	38.0x	4.6x	KBPPWBIL	28.3	-	217.6	NM	2.4x
CONTININS	49.9	+6.9%	101.4	83.2x	2.3x	BXPHARMA	45,564	2.6%	14.6x	1.5x	SIMTEX	27.6	+8.7%	195.1	30.3x	1.2x
JANATAINS	40.4	+6.0%	76.6	28.7x	2.6x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	GEMINISEA	808.1	+3.6%	189.1	38.5x	31.8x
LEGACYFOOT	123.3	+5.4%	111.4	NM	14x	GP	38,700	2.2%	11.9x	7.3x	RUPALILIFE	115.9	+1.6%	175.2	NM	NM
MEGHNAINS	45.3	+5.1%	38.5	23.0x	3.2x	BRACBANK	30,964	1.8%	8.3x	0.9x	EMERALDOIL	168.4	-2.0%	163.0	NM	NM
ASIAPACINS	59.6	+4.9%	29.2	24.9x	2.6x	ISLAMIBANK	29,927	1.7%	8.4x	0.7x	NAVANAPHAR	106.3	+4.0%	162.3	24.1x	2.6x
CENTRALPHL	13.1	+4.8%	46.7	NM	2.3x	LHBL	28,562	1.6%	13.8x	4.1x	DAFODILCOM	80.8	-6.5%	144.6	NM	6.0x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	19,162	1.1%	4.7x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DAFODILCOM	80.8	-6.5%	144.6	NM	6.0x	NBL	19,116	1.1%	NM	0.8x	EMERALDOIL	156.7	155.1	4.0	425	66.48
RDFOOD	48.8	-2.0%	101.7	39.7x	3x	CITYBANK	18,190	1.0%	5.5x	0.7x	EASTERNINS	53.7	53.7	1.0	740	39.74
EMERALDOIL	168.4	-2.0%	163.0	NM	NM	OLYMPIC	16,066	0.9%	18.1x	3.0x	RENATA	1,141.8	1,141.8	1.0	32	36.65
AL-HAJTEX	181.6	-1.7%	16.3	NM	20.0x	ROBI	15,714	0.9%	69.8x	2.5x	SEAPEARL	183.0	163.8	6.0	134	23.41
INTECH	25.6	-1.5%	4.8	NM	22.7x	ALARABANK	14,357	0.8%	15.7x	1.1x	SIMTEX	26.7	25.5	6.0	870	22.81
ARAMIT	272.0	-1.5%	5.6	45.9x	1.9x	BSRMLTD	14,210	0.8%	NM	0.7x	FORTUNE	74.9	74.9	2.0	225	16.86
PUBALIBANK	27.5	-1.4%	0.1	4.7x	0.6x	SEAPEARL	13,733	0.8%	26.4x	10.5x	BEXIMCO	115.2	115.0	4.0	139	15.97
YPL	26.9	-1.1%	53.0	NM	5.0x	UPGDCL	13,547	0.8%	16.7x	4.4x	SONALIPAPR	739.0	660.0	3.0	21	14.48
SHYAMPSUG	100.0	-1.1%	1.5	NM	NM	PRIMEBANK	13,491	0.8%	5.2x	0.7x	FINEFOODS	123.0	119.0	8.0	108	13.14
IMAMBUTTON	105.3	-1.0%	8.6	NM	21.9x						CRYSTALINS	64.0	56.0	6.0	142	8.87
<div>* 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</div>																

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\*\* 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	156.7	155.1	66.5	425	4
EASTERNINS	53.7	53.7	39.7	740	1
RENATA	1,141.8	1,141.8	36.7	32	1
SEAPEARL	183.0	163.8	23.4	134	6
SIMTEX	26.7	25.5	22.8	870	6
FORTUNE	74.9	74.9	16.9	225	2
BEXIMCO	115.2	115.0	16.0	139	4
SONALIPAPR	739.0	660.0	14.5	21	3
FINEFOODS	123.0	119.0	13.1	108	8
CRYSTALINS	64.0	56.0	8.9	142	6
GEMINISEA	793.9	734.2	8.4	11	3
AAMRANET	66.2	55.9	7.5	114	2
RUPALILIFE	117.9	117.9	7.1	60	1
ALIF	13.3	12.0	5.1	403	5
BEACHHATCH	44.8	44.8	4.5	100	2
AOL	32.9	32.9	3.9	120	6
LRBDL	31.7	31.6	3.8	121	7
GP	261.6	261.6	3.7	14	7
JHRML	87.8	73.0	2.8	33	2
MIDLANDBNK	13.8	13.8	2.8	200	1
HRTEX	105.0	104.4	2.6	25	5
CITYGENINS	47.0	47.0	2.4	50	1
<b>Total</b>			<b>348.8</b>		<b>132</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

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**Important DSE News**  
**SOUTHEASTB**  
 Mr. Iftekhar Azim Ahmed, one of the Sponsors of the company, has expressed his intention to transfer 50,00,000 shares out of his holding of 54,15,000 shares of the company to his son Mr. Saleh Ahmed (General Shareholder of the company), by way of gift outside the trading system of the Exchange within 30 working days with effect from August 13, 2023.