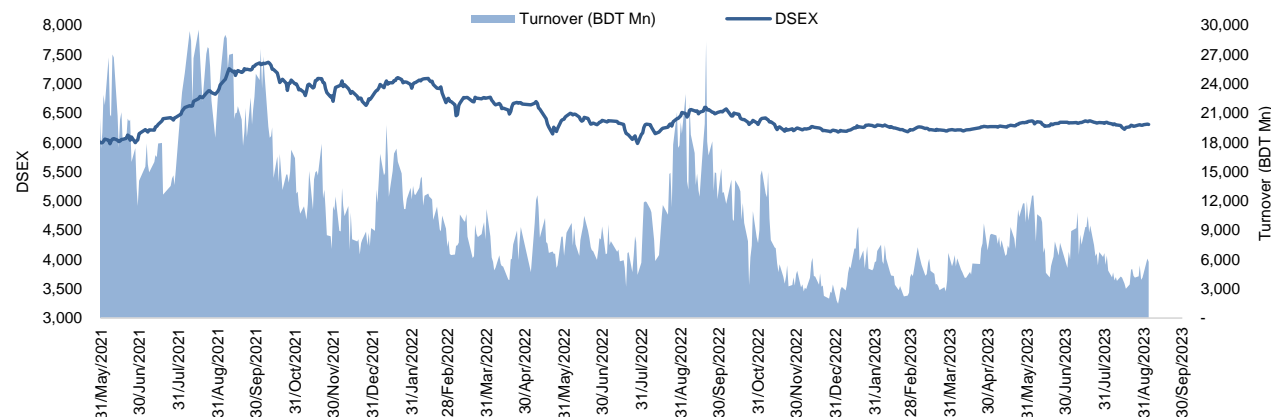


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.06%) lost 3.79 points and closed at 6,307.82. The blue-chip index DS30 (-0.15%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (-0.05%) closed at 2,143.49, 1,372.12, and 1,211.08 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.07% followed by Pharmaceutical (-0.07%), Food & Allied (-0.03%), Engineering (-0.03%), NBF (I) (-0.02%), Bank (-0.01%), and Telecommunication (0.00%), respectively. Block trades contributed 6.2% of the overall market turnover. Fu Wang Food Ltd. (+3.0%) was the most traded share with a turnover of BDT 657 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,307.82	6,311.61	-3.79	-0.06%	+1.6%
DS30	2,143.49	2,146.79	-3.29	-0.15%	-2.4%
DSES	1,372.12	1,373.93	-1.82	-0.13%	+1.0%
CDSET	1,211.08	1,211.72	-0.64	-0.05%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	58	102	164	324
A Category (Equity)	39	52	114	205
B Category (Equity)	15	41	41	97
N Category (Equity)	1	1	3	5
Z Category (Equity)	3	8	6	17
Mutual Funds	0	1	14	15
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,765,172	7,766,674	-0.0%
	Mn USD	70,915	70,929	-0.0%
Turnover	Mn BDT	5,771	6,107	-5.5%
	Mn USD	53	56	-5.5%
Volume	Mn Shares	124	124	-0.2%
No. of Trade		133,313	138,589	-3.8%

* Average Interbank Exchange Rate is BDT 109.50 as of Sep 04, 2023

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Figure: Sectorial Turnover (BDT Mn)

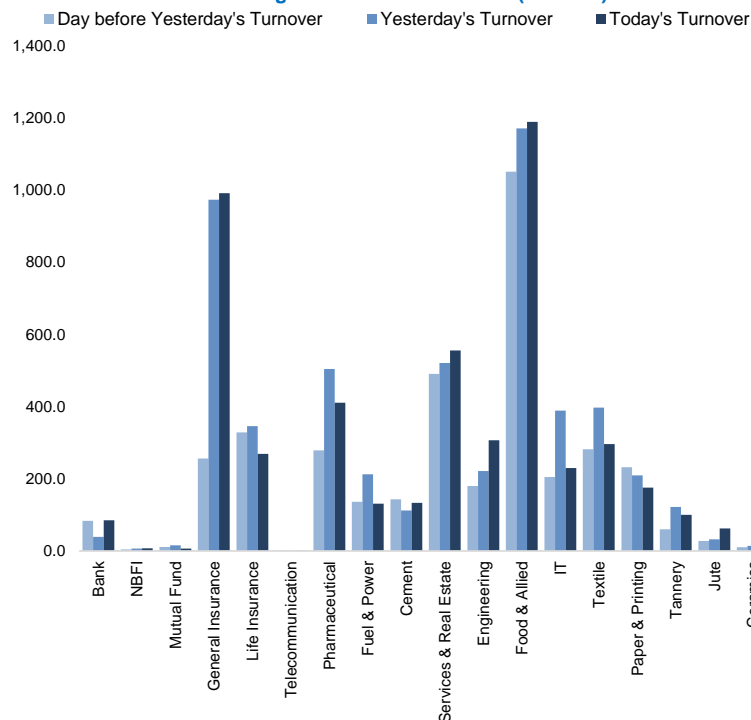
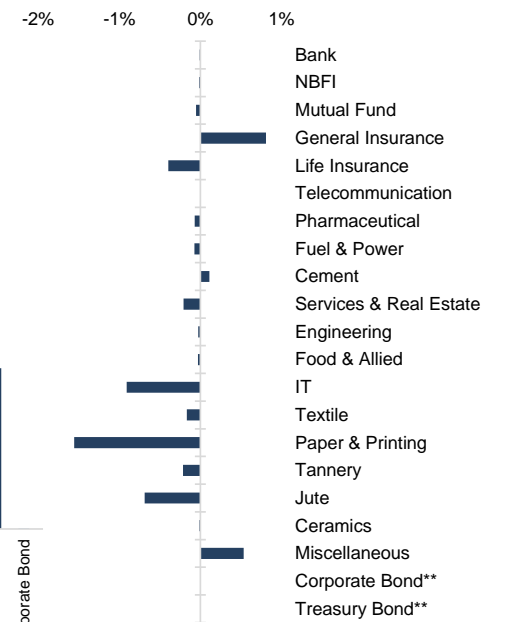


Figure: Sectorial Mcap Change



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	1,451	-0.16	-0.01%	35	683,987	9.3%	85.2	1.6%	12.1x	0.7x	GP	386,996	8.5%	0.1	11.9x	7.3x
NBFI	1,919	1,919	-0.33	-0.02%	23	186,693	2.5%	7.4	0.1%	NM	6.1x	WALTONHIL	317,378	7.0%	0.2	49.1x	3.2x
Mutual Fund	830	831	-0.44	-0.05%	37	37,551	0.5%	6.7	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.2	15.4x	6.2x
General Insurance	3,551	3,523	+28.55	+0.81%	42	103,653	1.4%	991.1	18.3%	19.2x	1.6x	SQURPHARMA	186,775	4.1%	33.9	9.9x	1.7x
Life Insurance	2,667	2,677	-10.60	-0.40%	15	74,531	1.0%	268.6	5.0%	NM	NM	ROBI	157,138	3.5%	0.2	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.3	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.3	38.0x	4.6x
Pharmaceutical	3,729	3,731	-2.55	-0.07%	34	723,263	9.8%	410.7	7.6%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,703	-1.27	-0.07%	23	448,852	6.1%	130.7	2.4%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,587	2,584	+2.89	+0.11%	7	124,257	1.7%	133.4	2.5%	27.4x	2.7x	BERGERPBL	87,005	1.9%	7.6	28.4x	6.2x
Services & Real Estate	1,871	1,875	-3.90	-0.21%	8	73,932	1.0%	555.2	10.3%	24.7x	1.2x	LHBL	81,296	1.8%	73.1	13.8x	4.1x
Engineering	4,494	4,495	-1.19	-0.03%	42	527,431	7.2%	306.9	5.7%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,658	21,664	-6.27	-0.03%	21	400,750	5.4%	1,188.4	22.0%	20.2x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,155	3,184	-28.87	-0.91%	11	41,132	0.6%	229.6	4.2%	29.0x	3.0x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,632	1,635	-2.74	-0.17%	58	170,847	2.3%	295.9	5.5%	79.6x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,891	11,064	-172.11	-1.56%	6	41,964	0.6%	175.5	3.2%	40.5x	2.1x	ISLAMIBANK	52,486	1.2%	1.2	8.4x	0.7x
Tannery	3,223	3,230	-6.89	-0.21%	6	34,044	0.5%	100.0	1.9%	46.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	16,246	16,358	-112.15	-0.69%	3	3,974	0.1%	62.6	1.2%	NM	-1379.6x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-0.08	-0.01%	5	31,446	0.4%	10.2	0.2%	53.4x	1.9x	UNILEVERCL	39,374	0.9%	0.4	45.5x	22.4x
Miscellaneous	4,250	4,228	+22.55	+0.53%	14	231,417	3.1%	445.3	8.2%	16.3x	1.8x	POWERGRID	37,347	0.8%	0.1	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,139	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,806,826	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
MIRACLEIND	46.4	+10.0%	120.2	NM	1.5x	SQURPHARMA	121,499	7.0%	9.9x	1.7x	FUWANGFOOE	41.6	+3.0%	657.3	NM	10.5x
EASTERNINS	59.0	+9.9%	141.5	19.0x	1.1x	BATBC	74,086	4.3%	15.4x	6.2x	EHL	102.3	+0.3%	325.4	13.9x	1.3x
YPL	29.3	+8.9%	154.6	NM	5.5x	BEXIMCO	69,196	4.0%	12.0x	1.2x	GEMINISEA	803.1	-0.6%	176.2	38.3x	31.6x
NORTHRNINS	46.2	+5.5%	3.9	25.0x	1.9x	RENATA	68,042	3.9%	38.0x	4.6x	RUPALILIFE	114.0	-1.6%	169.3	NM	NM
CRYSTALINS	71.1	+4.9%	154.3	21.9x	2.9x	BXPHARMA	45,564	2.6%	14.6x	1.5x	YPL	29.3	+8.9%	154.6	NM	5.5x
ARAMITCEM	28.1	+4.9%	40.4	NM	29.0x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	CRYSTALINS	71.1	+4.9%	154.3	21.9x	2.9x
PARAMOUNT	45.2	+4.6%	30.0	30.3x	2x	GP	38,700	2.2%	11.9x	7.3x	SEAPEARL	179.4	-1.4%	149.5	26.0x	10.4x
ASIAPACINS	61.8	+3.7%	47.1	25.9x	2.7x	BRACBANK	30,964	1.8%	8.3x	0.9x	EMERALDOIL	168.6	+0.1%	146.5	NM	NM
SINOBANGLA	73.6	+3.2%	55.2	40.3x	2.6x	ISLAMIBANK	29,927	1.7%	8.4x	0.7x	EASTERNINS	59.0	+9.9%	141.5	19.0x	1.1x
KEYACOSMET	6.6	+3.1%	51.1	NM	0.5x	LHBL	28,562	1.6%	13.8x	4.1x	CONTININS	48.6	-2.6%	134.7	81.0x	2.3x

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)
SIMTEX	26.5	-4.0%	92.0	29.1x	1.2x	NBL	19,116	1.1%	NM	0.8x	SIMTEX	30.0	26.0	26.0	3,144	88.22
CENTRALPHL	12.7	-3.1%	22.5	NM	2x	CITYBANK	18,190	1.0%	5.5x	0.7x	EMERALDOIL	160.0	152.6	13.0	421	65.75
GENNEXT	6.4	-3.0%	27.4	NM	0.5x	OLYMPIC	16,066	0.9%	18.0x	3.0x	BEXIMCO	115.2	104.3	6.0	269	30.85
BDTHAI	13.3	-2.9%	8.4	NM	0.5x	ROBI	15,714	0.9%	69.8x	2.5x	BATBC	479.8	479.8	4.0	53	25.50
OIMEX	21.5	-2.7%	10.4	NM	2.0x	ALARABANK	14,357	0.8%	15.8x	1.1x	EGEN	43.8	40.7	3.0	512	20.88
CONTININS	48.6	-2.6%	134.7	81.0x	2.3x	BSRMLTD	14,210	0.8%	NM	0.7x	SONALIPAPR	718.7	648.9	4.0	20	13.92
AGNISYSL	26.6	-2.6%	35.0	22.5x	1.7x	SEAPEARL	13,733	0.8%	26.0x	10.4x	BEACHHATCH	44.0	44.0	1.0	200	8.80
CAPMIBLMF	11.9	-2.5%	4.8	NM	1.3x	UPGDCL	13,547	0.8%	16.7x	4.4x	CRYSTALINS	67.0	61.5	5.0	132	8.66
GREENDELT	72.6	-2.4%	40.7	11.5x	1.0x	PRIMEBANK	13,491	0.8%	5.2x	0.7x	SEAPEARL	187.0	172.0	4.0	48	8.42
SONALIPAPR	675.9	-2.3%	103.4	72.3x	3.9x						FORTUNE	75.0	68.2	7.0	89	6.17

* 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
SIMTEX	30.0	26.0	88.2	3,144	26
EMERALDOIL	160.0	152.6	65.8	421	13
BEXIMCO	115.2	104.3	30.9	269	6
BATBC	479.8	479.8	25.5	53	4
EGEN	43.8	40.7	20.9	512	3
SONALIPAPR	718.7	648.9	13.9	20	4
BEACHHATCH	44.0	44.0	8.8	200	1
CRYSTALINS	67.0	61.5	8.7	132	5
SEAPEARL	187.0	172.0	8.4	48	4
FORTUNE	75.0	68.2	6.2	89	7
HRTEX	115.0	104.4	5.8	55	10
BEACONPHAR	266.3	266.3	5.1	19	1
ABBANK	9.1	9.1	4.6	504	1
SALVOCHEM	61.8	56.0	4.5	74	4
LRBDL	34.9	31.6	4.3	135	7
RUPALILIFE	117.0	117.0	3.5	30	1
UNIONINS	57.8	56.0	3.5	62	2
CITYGENINS	45.5	45.5	3.2	70	1
EHL	100.0	100.0	3.0	30	1
ORIONPHARM	79.6	78.0	3.0	38	2
SILCOPHL	25.7	25.7	2.6	100	1
NBL	8.2	8.1	2.5	309	3
Total			356.8		153

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CAPMBDBLMF		0.0%	6%	Record Date	07-Sep-23
CAPMIBBLMF		0.0%	6%	Record Date	07-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
BSCCL		0.0%	51%	Record Date	20-Sep-23
IBNSINA		0.0%	60%	Record Date	21-Sep-23
BIFC		0.0%	0%	Record Date	26-Sep-23
EHL		0.0%	25%	Record Date	18-Oct-23

Important DSE News

PUBALIBANK

Trouser Line Limited (where Mrs. Rana Laila Hafiz is the Director of Pubali Bank Ltd. and Managing Director of Trouser Line Limited), has further informed that it has completed its buying of 20,00,000 shares of the Company through Dhaka Stock Exchange Limited as per declaration disseminated on 20.06.2023.

UCB

Hajee Abul Kalam, one of the Sponsors of the company, has expressed his intention to transfer 1,15,00,000 shares out of his holding of 2,95,34,047 shares of the company to his son Mohammed Nasim Kalam (General Shareholder of the company), by way of gift outside the trading system of the Exchange within 30 working days with effect from August 29, 2023.

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