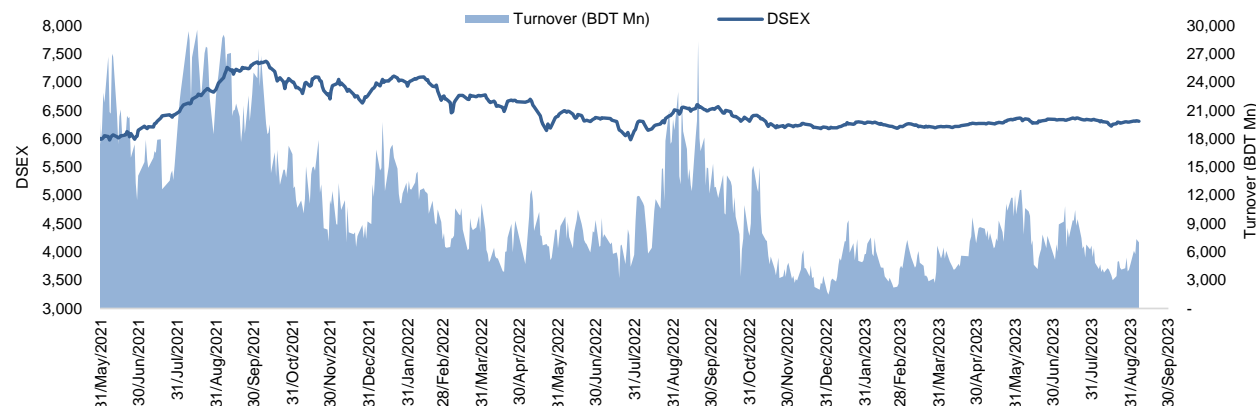


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.16%) lost 9.9 points and closed at 6,307.08. The blue-chip index DS30 (-0.33%), the Shariah-based index DSES (-0.22%), and the large-cap index CDSET (-0.14%) closed at 2,137.10, 1,369.19, and 1,209.14 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.16% followed by Bank (-0.11%), Pharmaceutical (-0.10%), Engineering (-0.07%), Fuel & Power (-0.04%), Telecommunication (0.00%), and NBFI (+0.01%), respectively. Block trades contributed 13.1% of the overall market turnover. Fu Wang Food Ltd. (-3.7%) was the most traded share with a turnover of BDT 568 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,307.08	6,316.98	-9.90	-0.16%	+1.6%
DS30	2,137.10	2,144.21	-7.11	-0.33%	-2.7%
DSES	1,369.19	1,372.17	-2.98	-0.22%	+0.8%
CDSET	1,209.14	1,210.81	-1.67	-0.14%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	53	110	166	329
A Category (Equity)	35	61	110	206
B Category (Equity)	11	41	47	99
N Category (Equity)	3	0	2	5
Z Category (Equity)	4	8	7	19
Mutual Funds	0	2	16	18
Corporate Bonds	0	0	4	4
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,764,300	7,769,524	-0.1%
	Mn USD	70,745	70,793	
Turnover	Mn BDT	7,008	7,343	-4.6%
	Mn USD	64	67	
Volume	Mn Shares	140	150	-6.4%
No. of Trade		155,663	153,484	+1.4%

* Average Interbank Exchange Rate is BDT 109.75 as of Sep 07, 2023

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Figure: Sectorial Turnover (BDT Mn)

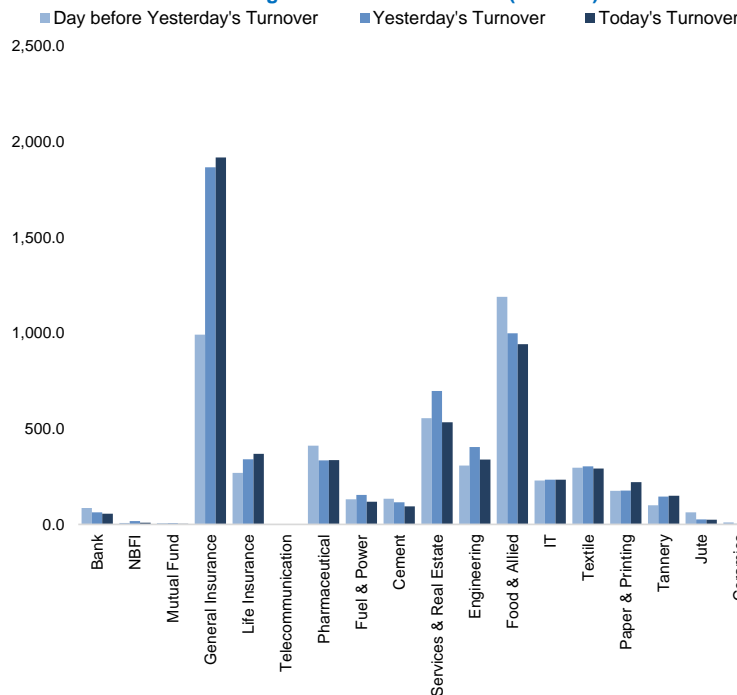
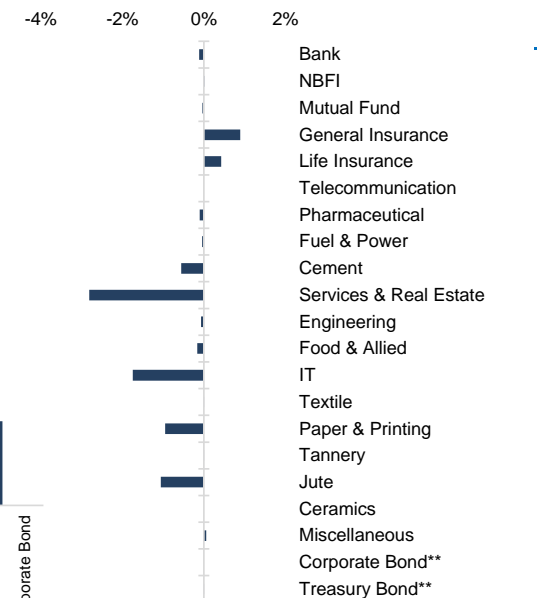


Figure: Sectorial Mcap Change



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	1,448	1,450	-1.63	-0.11%	35	682,560	9.3%	56.2	0.9%	12.1x	0.7x	GP	386,996	8.5%	0.2	11.9x	7.3x
NBFI	1,918	1,918	+0.18	+0.01%	23	186,676	2.5%	8.6	0.1%	NM	6.1x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	828	829	-0.28	-0.03%	36	37,461	0.5%	3.7	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.7	15.4x	6.2x
General Insurance	3,720	3,687	+33.01	+0.90%	42	108,571	1.5%	1,916.7	31.5%	20.1x	1.7x	SQURPHARMA	186,775	4.1%	35.3	9.9x	1.7x
Life Insurance	2,664	2,653	+11.37	+0.43%	15	74,458	1.0%	368.8	6.1%	NM	NM	ROBI	157,138	3.5%	0.0	69.8x	2.5x
Telecommunication	4,946	4,946	-	-	3	580,232	7.9%	0.2	0.0%	15.6x	4.4x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,723	3,727	-3.89	-0.10%	34	722,226	9.8%	336.4	5.5%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,701	1,702	-0.72	-0.04%	23	448,634	6.1%	118.9	2.0%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,567	2,581	-14.41	-0.56%	7	123,278	1.7%	94.0	1.5%	27.2x	2.7x	BERGERPBL	88,457	1.9%	5.4	28.9x	6.3x
Services & Real Esta	1,842	1,895	-53.24	-2.81%	8	72,758	1.0%	534.2	8.8%	24.3x	1.2x	LHBL	80,599	1.8%	58.1	13.7x	4.1x
Engineering	4,492	4,496	-3.21	-0.07%	42	527,267	7.2%	339.3	5.6%	69.0x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,625	21,661	-35.72	-0.16%	21	400,153	5.4%	941.6	15.5%	20.1x	7.6x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,119	3,175	-55.41	-1.75%	11	40,665	0.6%	233.3	3.8%	28.7x	2.9x	BRACBANK	57,596	1.3%	0.1	8.3x	0.9x
Textile	1,633	1,633	+0.11	+0.01%	58	170,982	2.3%	292.5	4.8%	79.7x	1.2x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,674	10,776	-101.95	-0.95%	6	41,124	0.6%	221.4	3.6%	39.7x	2.1x	ISLAMIBANK	52,486	1.2%	0.2	8.4x	0.7x
Tannery	3,231	3,231	+0.22	+0.01%	6	34,127	0.5%	149.9	2.5%	46.7x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	7.9x	1.0x
Jute	15,994	16,165	-170.79	-1.06%	3	3,913	0.1%	24.4	0.4%	NM	-1358.3x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	680	680	-	-	5	31,446	0.4%	1.9	0.0%	53.4x	1.9x	UNILEVERCL	39,113	0.9%	2.3	45.2x	22.2x
Miscellaneous	4,270	4,268	+2.55	+0.06%	14	232,501	3.2%	440.2	7.2%	16.4x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	10	35,139	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	88	88	+0.00	+0.00%	232	2,806,902	38.1%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PARAMOUNT	52.6	+9.8%	99.1	35.3x	2.0x
PIONEERINS	79.4	+7.4%	207.5	14.5x	1.7x
STANDARINS	47.2	+5.8%	63.8	19.8x	2.1x
SONARBAINS	48.6	+4.7%	39.1	33.9x	2.1x
RELIANCINS	75.2	+4.6%	53.4	14.7x	1.1x
GREENDELT	78.7	+4.5%	147.6	12.4x	1.1x
TAKAFULINS	45.6	+4.3%	11.5	30.8x	2x
MEGHNALIFE	74.4	+3.3%	94.8	NM	NM
SAMATALETH	61.8	+3.0%	5.3	NM	4.3x
YPL	29.3	+2.8%	133.2	NM	5.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	24.9	-8.5%	119.7	NM	2.1x
MEGHNA PET	33.7	-7.2%	5.5	NM	NM
SEAPEARL	165.8	-6.3%	219.4	24.0x	9.6x
CRYSTALINS	72.5	-6.1%	109.1	22.3x	2.9x
DAFODILCOM	78.5	-5.3%	31.3	NM	5.8x
LEGACYFOOT	120.8	-4.7%	136.2	NM	13.5x
NORTHERN	202.8	-4.7%	5.2	NM	2.5x
EHL	98.7	-4.2%	185.0	13.4x	1.2x
INTRACO	39.3	-4.1%	78.3	26.1x	3.1x
PRIMELIFE	52.8	-4.0%	20.2	NM	NM

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	4.3%	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%	8.3x	0.9x
ISLAMIBANK	29,927	1.7%	8.4x	0.7x
LHBL	28,562	1.6%	13.7x	4.1x
PUBALIBANK	19,162	1.1%	4.6x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.5x	0.7x
OLYMPIC	16,066	0.9%	18.0x	3.0x
ROBI	15,714	0.9%	69.8x	2.5x
ALARABANK	14,357	0.8%	15.6x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
SEAPEARL	13,733	0.8%	24.0x	9.6x
UPGDCL	13,547	0.8%	16.7x	4.4x
PRIMEBANK	13,491	0.8%	5.2x	0.7x

* 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
FUWANGFOOT	41.3	-3.7%	568.2	NM	10.4x
SEAPEARL	165.8	-6.3%	219.4	24.0x	9.6x
PIONEERINS	79.4	+7.4%	207.5	14.5x	1.7x
EHL	98.7	-4.2%	185.0	13.4x	1.2x
CONTININS	49.1	-3.5%	165.6	81.8x	2.3x
SONALIPAPR	660.1	-0.4%	161.3	70.6x	3.9x
MIRACLEIND	48.7	+1.9%	158.2	NM	1.6x
GREENDELT	78.7	+4.5%	147.6	12.4x	1.1x
LEGACYFOOT	120.8	-4.7%	136.2	NM	13.5x
YPL	29.3	+2.8%	133.2	NM	5.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEXGSUKUK	85.0	85.0	3.0	5,880	499.80
SIMTEX	27.5	26.5	15.0	2,789	75.45
SQURPHARMA	215.0	215.0	2.0	175	37.63
SEAPEARL	186.2	173.0	6.0	195	34.11
BRACBANK	32.3	32.3	2.0	938	30.28
BEXIMCO	115.3	104.1	7.0	224	25.61
CRYSTALINS	74.5	70.0	4.0	319	23.37
JAMUNAOIL	186.0	186.0	1.0	125	23.25
MJLBD	94.0	94.0	2.0	210	19.74
EMERALDOIL	156.0	155.0	5.0	88	13.70

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEXGSUKUK	85.0	85.0	499.8	5,880	3
SIMTEX	27.5	26.5	75.5	2,789	15
SQURPHARMA	215.0	215.0	37.6	175	2
SEAPPEARL	186.2	173.0	34.1	195	6
BRACBANK	32.3	32.3	30.3	938	2
BEXIMCO	115.3	104.1	25.6	224	7
CRYSTALINS	74.5	70.0	23.4	319	4
JAMUNAOIL	186.0	186.0	23.3	125	1
MJLBD	94.0	94.0	19.7	210	2
EMERALDOIL	156.0	155.0	13.7	88	5
EBL	30.0	26.7	11.4	397	11
ACTIVEFINE	17.4	17.4	10.4	600	2
HRTEX	115.0	104.4	8.8	80	8
SONALIPAPR	625.0	613.0	6.3	10	3
PADMAOIL	212.0	212.0	5.3	25	2
LRBDL	35.0	31.6	5.0	152	6
BSCCL	218.9	218.9	4.4	20	1
AL-HAJTEX	181.5	175.1	4.2	24	3
BBSCABLES	45.0	45.0	4.1	92	2
GP	261.6	261.6	3.7	14	6
EASTERNINS	71.1	71.0	3.6	50	2
ROBI	27.1	27.0	3.4	125	3
Total			920.4		161

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PRIMELIFE		0.0%	0%	Record Date	27-Sep-23
EHL		0.0%	25%	Record Date	18-Oct-23

Important DSE News

PRIMELIFE

The Board of Directors has recommended No Dividend for the year ended December 31, 2022. Date of AGM: 06.11.2023, Time: 12:00 PM, Venue: Digital Platform. Record Date: 27.09.2023.

(Q1 Un-audited): As per consolidated life revenue account of the company for January to March, 2023, excess of total expenses including claims over total income (deficit) was BDT 751.18 million as against excess of total expenses including claims over total income (deficit) of BDT 901.51 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund as on March 31, 2023 was BDT 6,962.15 million as against BDT 7,176.01 million as on March 31, 2022 resulting a net decrease of BDT 213.86 million.

(Q2 Un-audited): As per consolidated life revenue account of the company for April to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 56.10 million as against excess of total expenses including claims over total income (deficit) of BDT 90.27 million in the corresponding previous period of 2022. Whereas as per consolidated life revenue account of the company for January to June, 2023, excess of total expenses including claims over total income (deficit) was BDT 807.29 million as against excess of total expenses including claims over total income (deficit) of BDT 991.79 million in the corresponding previous period of 2022. Accordingly, Balance of Life Insurance Fund was BDT 6,906.04 million as on June 30, 2023 as against BDT 7,085.74 million as on June 30, 2022 resulting a net decrease of BDT 179.70 million.

LEGACYFOOT

The company has informed that Rupali Bank Limited has officially sanctioned the exemption of interest from Rupali Bank Limited, Ramna Corporate Branch, on the outstanding loan balance of the company, amounting to Tk. 315,957,741.00 as per the Financial Statements for the period ended March 31, 2023. The Company is now required to pay Tk. 116,647,303.53 as final settlement of the entire loan with Rupali Bank Limited. The disbursement for this repayment will be made from the funds received through raising of paid-up capital, in accordance with the guidelines stipulated by the Securities and Exchange Commission (Issue of Capital) Rules, 2001.

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