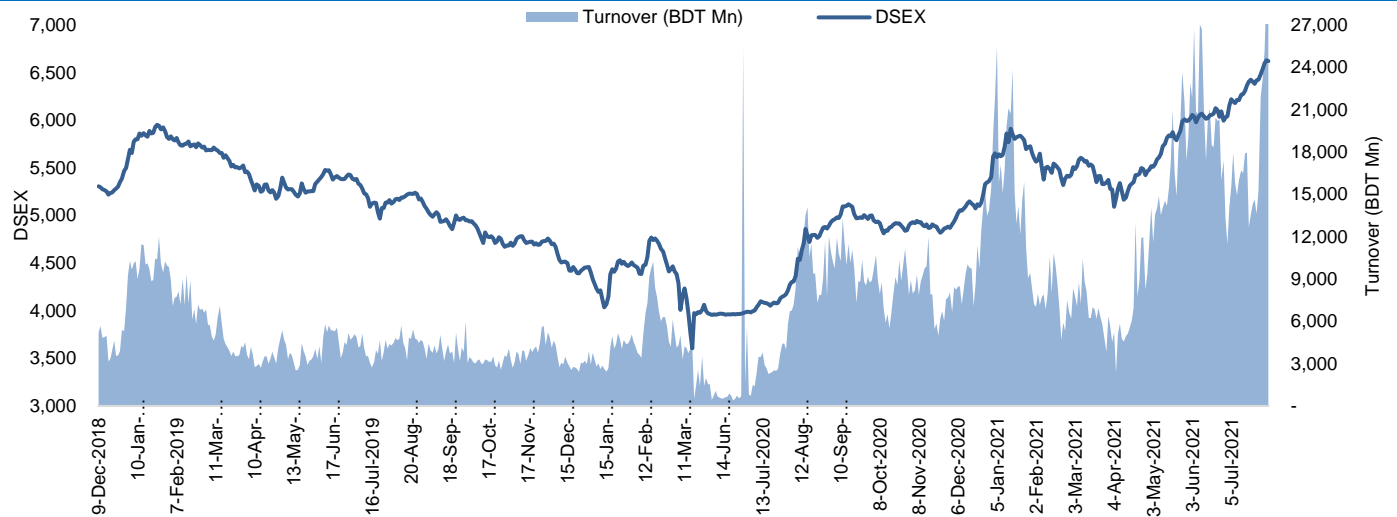


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.16%) lost 10.31 points and closed at 6,617.83. The blue-chip index DS30 (-0.36%), the Shariah-based index DSES (-0.66%), and the large-cap index CDSET (+0.25%) closed at 2,384.10, 1,442.47, and 1,298.17 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 2.85% followed by Bank (+1.07%), Engineering (+0.34%), Food & Allied (+0.20%). Telecommunication experienced the highest loss of 1.57% followed by Fuel & Power (-0.79%), Pharmaceutical (-0.62%). Block trades contributed 5.6% of the overall market turnover. Bangladesh Export Import Company Ltd. (+0.8%) was the most traded share with a turnover of BDT 1,671 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,617.83	6,628.14	-10.31	-0.16%	+22.5%
DS30	2,384.10	2,392.63	-8.52	-0.36%	+21.4%
DSES	1,442.47	1,452.11	-9.64	-0.66%	+16.1%
CDSET	1,298.17	1,294.97	+3.20	+0.25%	+15.6%

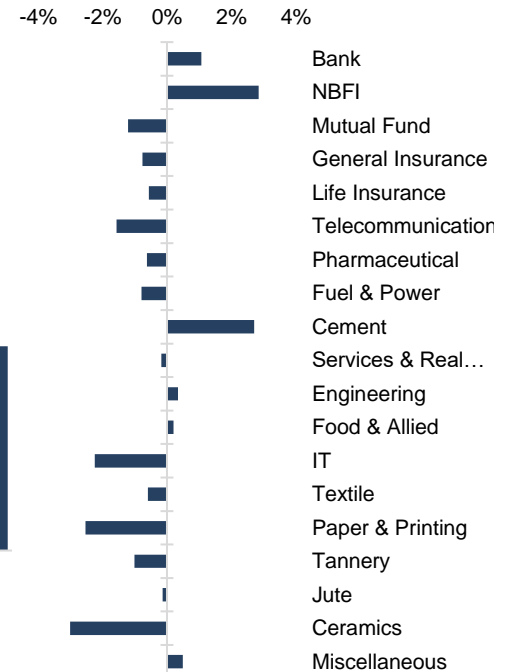
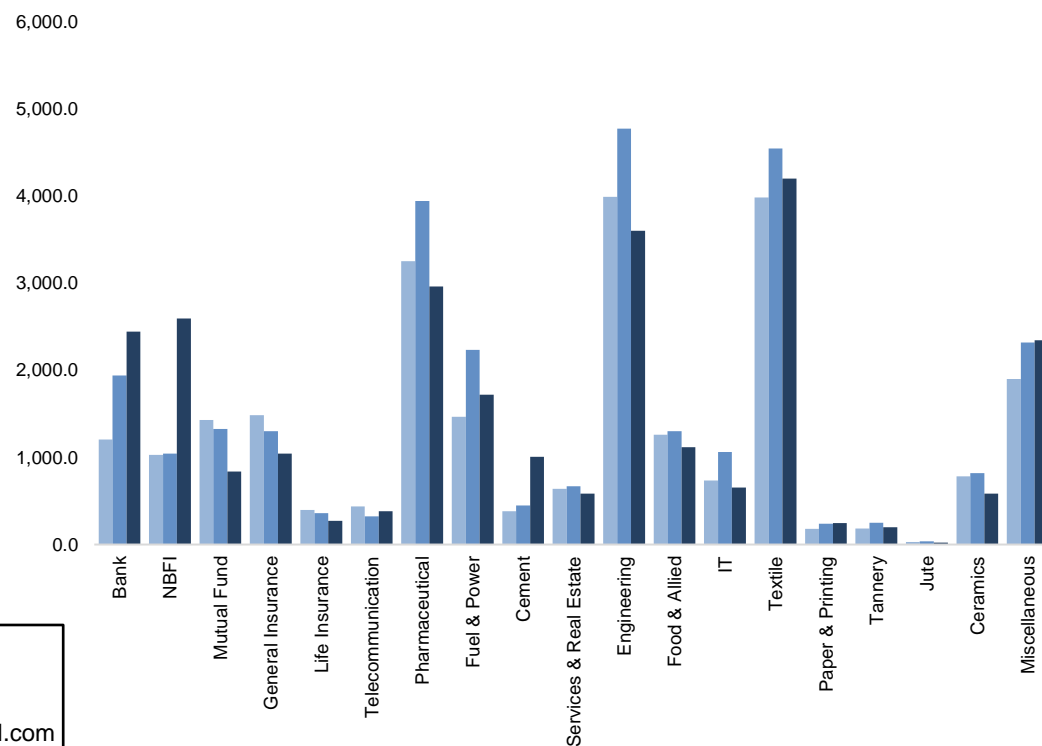
Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change

	Advanced	Declined	Unchanged	Total
All Category	137	223	15	375
A Category (Equity)	90	171	13	274
B Category (Equity)	26	32	1	59
N Category (Equity)	2	8	1	11
Z Category (Equity)	19	12	0	31
Mutual Funds	2	29	5	36
Corporate Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,450,445	5,455,356	-0.1%
	Mn USD	64,153	64,211	
Turnover	Mn BDT	28,401	29,395	-3.4%
	Mn USD	334	346	
Volume	Mn Shares	942	971	-3.0%
No. of Trade		392,759	421,803	-6.9%

Figure: Sectorial Turnover (BDT Mn)



Market PE 19.5x
Market PB 2.1x

Anika Mafiz Research Analyst (880) 1708805206 anika.mafiz@bracepl.com	Md Mahirul Quddus Research Associate (880) 1709636546 mmahirul.quddus@bracepl.com
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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	1,587	1,570	+16.76	+1.07%	31	689,285	14.1%	2,444.1	9.1%	8.4x	0.8x	GP	487,323	10.0%	128.5	13.3x	9.8x
NBFI	2,239	2,177	+61.95	+2.85%	23	224,651	4.6%	2,592.4	9.7%	42.6x	3.5x	WALTONHIL	446,516	9.1%	68.7	44.7x	7.8x
Mutual Fund	1,109	1,123	-13.57	-1.21%	37	50,486	1.0%	836.7	3.1%	NM	1.0x	BATBC	308,502	6.3%	336.1	22.8x	8.3x
General Insurance	5,191	5,231	-39.78	-0.76%	38	135,060	2.8%	1,043.9	3.9%	23.9x	2.5x	ROBI	224,184	4.6%	167.4	NM	3.4x
Life Insurance	2,669	2,684	-15.12	-0.56%	13	73,892	1.5%	272.9	1.0%	NM	NM	SQURPHARMA	204,504	4.2%	242.8	14.1x	2.4x
Telecommunication	6,269	6,369	-99.79	-1.57%	3	742,163	15.2%	382.0	1.4%	18.6x	6.1x	UPGDCL	168,575	3.4%	59.2	17.5x	5.6x
Pharmaceutical	3,892	3,917	-24.38	-0.62%	31	710,407	14.5%	2,960.1	11.0%	23.3x	2.9x	RENATA	134,995	2.8%	25.4	29.4x	5.6x
Fuel & Power	1,839	1,854	-14.65	-0.79%	23	511,411	10.5%	1,718.4	6.4%	13.5x	1.6x	ICB	97,826	2.0%	44.4	47.2x	2.2x
Cement	2,312	2,251	+60.99	+2.71%	7	131,216	2.7%	1,008.1	3.8%	19.1x	2.8x	BEXIMCO	85,792	1.8%	1,670.7	23.6x	1.3x
Services & Real Estate	1,204	1,206	-2.05	-0.17%	8	46,048	0.9%	585.1	2.2%	NM	1.0x	BXPBARMA	83,646	1.7%	208.9	18.3x	2.4x
Engineering	5,476	5,457	+18.75	+0.34%	42	674,474	13.8%	3,601.0	13.4%	32.6x	3.1x	BERGERPBL	83,494	1.7%	80.8	25.1x	7.2x
Food & Allied	23,431	23,384	+47.63	+0.20%	20	412,931	8.4%	1,114.9	4.2%	30.7x	8.9x	LHBL	76,651	1.6%	653.4	21.0x	4.2x
IT	3,223	3,297	-74.04	-2.25%	11	38,072	0.8%	655.2	2.4%	35.2x	2.7x	MARICO	74,419	1.5%	37.6	23.3x	27.4x
Textile	1,513	1,522	-8.98	-0.59%	58	163,788	3.3%	4,199.4	15.7%	NM	1.1x	BRACBANK	66,546	1.4%	170.1	13.8x	1.3x
Paper & Printing	6,553	6,723	-169.80	-2.53%	6	19,222	0.4%	244.2	0.9%	50.6x	1.3x	DUTCHBANGL	52,687	1.1%	44.2	9.7x	1.6x
Tannery	2,248	2,271	-22.93	-1.01%	6	24,750	0.5%	196.4	0.7%	NM	2.5x	SUMITPOWER	48,695	1.0%	203.0	8.7x	1.3x
Jute	8,937	8,949	-11.99	-0.13%	3	2,225	0.0%	22.5	0.1%	NM	16.1x	BEACONPHAR	48,325	1.0%	141.4	47.9x	9.2x
Ceramics	686	707	-21.29	-3.01%	5	33,725	0.7%	583.9	2.2%	38.4x	2.2x	ISLAMIBANK	46,690	1.0%	7.4	9.7x	0.7x
Miscellaneous	4,021	4,001	+19.70	+0.49%	14	208,305	4.3%	2,343.1	8.7%	27.5x	2.0x	TITASGAS	40,360	0.8%	53.8	11.2x	0.6x
												OLYMPIC	36,989	0.8%	57.3	17.9x	4.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TALLUSPIN	9.9	+10.0%	8.4	NM	0.9x
NHFIL	51.7	+10.0%	261.9	16.0x	2.9x
MEGHNA PET	19.8	+10.0%	3.2	NM	NM
USMANIAGL	75.7	+9.9%	8.3	NM	0.9x
ISLAMICFIN	26.0	+9.7%	423.4	16.5x	1.8x
FAREASTFIN	9.4	+9.3%	35.8	NM	8.2x
IPDC	32.8	+9.0%	154.3	15.4x	2.1x
FIRSTFIN	7.5	+8.7%	7.0	3.6x	1.2x
RSRMSTEEL	32.4	+8.0%	158.0	NM	0.7x
TUNGHAI	7.0	+7.7%	9.9	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	133,807	7.5%	14.1x	2.4x
BATBC	81,599	4.6%	22.8x	8.3x
RENATA	65,905	3.7%	29.4x	5.6x
BEXIMCO	59,582	3.3%	23.6x	1.3x
BXPBARMA	58,402	3.3%	18.3x	2.4x
GP	48,732	2.7%	13.3x	9.8x
BRACBANK	35,775	2.0%	13.8x	1.3x
BEACONPHAR	33,826	1.9%	47.9x	9.2x
LHBL	27,073	1.5%	21.0x	4.2x
EBL	24,175	1.4%	6.6x	1.1x
ISLAMIBANK	22,729	1.3%	9.7x	0.7x
OLYMPIC	22,437	1.3%	17.9x	4.2x
ROBI	22,306	1.3%	NM	3.4x
CITYBANK	19,555	1.1%	5.3x	1.0x
SUMITPOWER	17,915	1.0%	8.7x	1.3x
IFIC	17,398	1.0%	15.1x	0.9x
PUBALIBANK	17,330	1.0%	6.6x	0.6x
UPGDCL	16,858	0.9%	17.5x	5.6x
NBL	16,717	0.9%	7.8x	0.5x
PRIMEBANK	15,812	0.9%	7.8x	1.2x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	97.9	+0.8%	1,670.7	23.6x	1.3x
IFIC	16.2	+7.3%	1,044.7	15.1x	0.9x
LHBL	66.0	+3.4%	653.4	21.0x	4.2x
ORIONPHARM	70.9	-4.1%	548.2	23.1x	0.9x
APOLOISPAT	13.1	+0.8%	426.6	NM	0.7x
ISLAMICFIN	26.0	+9.7%	423.4	16.5x	1.8x
MALEKSPIN	34.9	-4.1%	410.4	NM	0.8x
LANKABAFIN	37.0	+2.2%	409.0	17.7x	1.9x
MLDYEING	32.7	+2.5%	349.6	67.2x	2.1x
GPHISPAT	51.4	-5.2%	345.5	19.0x	2.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DACCADYE	24.4	-8.6%	69.7	51.9x	2.8x
EMERALDOIL	34.0	-6.8%	36.7	NM	2.2x
GHAIL	21.7	-6.5%	120.5	NM	1.5x
AFCAGRO	31.2	-6.0%	82.4	NM	1.7x
BEACONPHAR	209.2	-5.8%	141.4	47.9x	9.2x
PAPERPROC	155.3	-5.7%	25.4	NM	5.7x
SONALIPAPR	375.1	-5.6%	67.3	95.3x	1.2x
SALVOCHEM	43.0	-5.5%	89.4	96.9x	3.4x
FINEFOODS	56.9	-5.5%	54.1	NM	5.4x
NURANI	10.6	-5.4%	77.6	NM	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
ALARABANK	25.0	25.0	772.1	30,884	1
NHFIL	51.7	47.6	221.8	4,368	21
DELTALIFE	145.0	140.0	358.6	2,560	5
GBBPOWER	37.5	37.5	21.2	564	2
ISLAMICFIN	26.0	26.0	11.4	440	3
FARCHEM	19.6	19.6	7.8	399	1
BEXIMCO	99.7	96.5	29.6	300	2
KTL	33.4	33.4	6.7	200	2
POPULAR1MF	7.3	7.3	1.4	190	1
BNICL	130.0	130.0	20.4	157	1

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
PREMIERCEM	75.4	68.0	11.0	151	4
TALLUSPIN	9.4	9.4	1.3	140	2
RAK CERAMIC	47.8	47.8	6.2	129	1
PTL	62.0	59.0	7.4	121	3
IFIC	14.5	13.8	1.6	114	2
BRACBANK	47.8	47.5	5.4	113	2
BAYLEASING	31.2	31.2	3.4	110	1
NAHEEACP	51.0	51.0	5.1	100	1
ESQUIRENIT	44.6	44.6	3.3	74	1
ARAMITCEM	59.4	59.4	3.6	60	1
AMANFEED	75.0	73.0	4.2	56	2
CONTININS	48.6	48.6	2.5	51	2
BXPHERMA	188.0	188.0	9.4	50	1
KEYACOSMET	10.1	10.1	0.5	50	1
MALEKSPIN	39.0	37.0	1.9	50	2
METROSPIN	23.7	23.7	1.2	50	1
PF1STMF	11.7	11.7	0.6	50	1
PREMIERLEA	11.0	11.0	0.6	50	1
ALARABANK	23.2	23.2	1.2	50	1
BARKAPOWER	30.4	30.4	1.4	45	1
NFML	36.9	34.4	1.5	41	2
EGEN	67.0	65.7	2.7	41	2
KAY&QUE	250.0	250.0	10.0	40	1
BEACONPHAR	204.0	204.0	7.8	38	1
MAKSONSPIN	23.0	23.0	0.7	30	1
RUPALIBANK	34.0	34.0	1.0	30	1
FORTUNE	65.9	65.9	1.9	29	1
OIMEX	32.0	32.0	0.9	28	1
RDFOOD	39.7	39.7	1.0	26	1
GHAIL	23.0	23.0	0.6	25	1
Total			1,596.1	30	####

Important DSE News
BERGERPBL

(Q1 Un-audited): Consolidated EPS was Tk. 16.09 for April-June 2021 as against Tk. 2.32 for April-June 2020; Consolidated NOCFPS was Tk. 1.24 for April-June 2021 as against Tk. (10.34) for April-June 2020. Consolidated NAV per share was Tk. 248.87 as on June 30, 2021 and Tk. 232.78 as on March 31, 2021. The Company also informed that EPS for first quarter ended 30 June, 2021 increased significantly mainly due to higher revenue compared to same period of previous year, which was heavily impacted by countrywide lockdown in Q1 2020-2021. Reduction of tax rate from 25.0% to 22.5% as per Finance Act 2021 is another reason for the increase of earnings per share. The net operating cash flow per share (NOCFPS) improved mainly because of higher revenue and lower operational expenses compared to revenue growth. (end)

EASTLAND

Mr. Moazzem Hossain, one of the Sponsor Directors of the Company, has expressed his intention to sell his entire holding of 16,77,811 shares of the Company at prevailing market price (in the Block Market) through Stock Exchange (DSE) within next 30 working days.

CNW

South Bangla Agriculture and Commerce Bank Ltd.: (Q2): As per un-audited half-yearly consolidated financial statements, net profit after taxation is BDT 209.50 million and basic EPS of BDT 0.31 for the 6 months (January-June 2021) period ended on 30 June 2021 against net profit after taxation of BDT 338.88 million and basic EPS of BDT 0.49 for the same period of the previous year. However, Post-IPO basic EPS for the 6 (six) months (January-June 2021) period ended on 30 June 2021 would be BDT 0.27. Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares) would be BDT 15.28 as on 30 June 2021 and the same would be Tk. 14.61 (considering Post-IPO paid up shares). Pre-IPO weighted average paid-up number of shares for 6 (six) months (January-June 2021) was 684,645,517 which was same for the same period of the previous year and Post-IPO paid-up number of shares would be 784,645,517.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BERGERPBL	-	0.0%	375.0%	Record Date	16-Aug-21
NBL	-	5.0%	0.0%	Record Date	17-Aug-21
MARICO	-	0.0%	200.0%	Record Date	18-Aug-21
SANDHANINS	-	0.0%	12.0%	Record Date	25-Aug-21

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