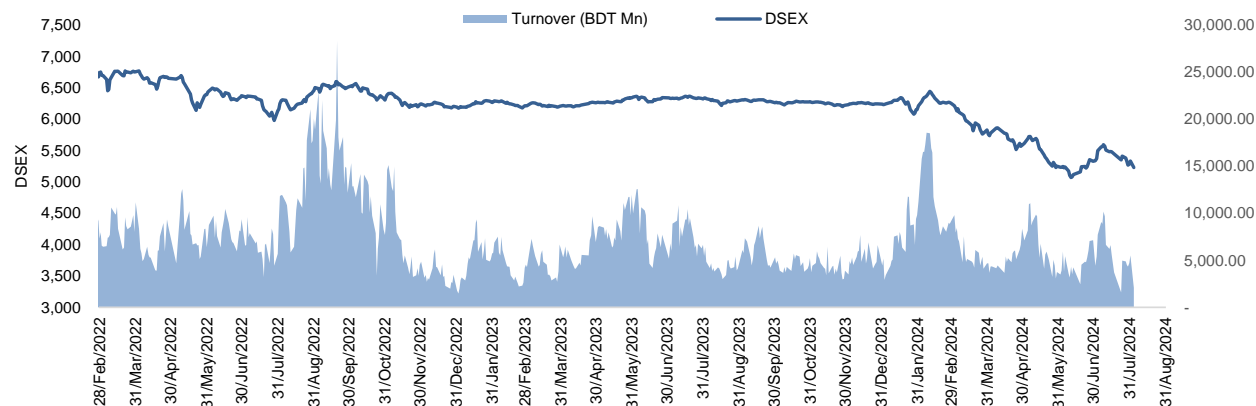


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.96%) lost 104.67 points and closed at 5,229.27. The blue-chip index DS30 (-2.20%), the Shariah-based index DSES (-1.85%), and the large-cap index CDSET (-1.62%) closed at 1,859.03, 1,143.85, and 1,008.95 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 2.97% followed by NBF1 (-2.72%), Engineering (-2.67%), Fuel & Power (-2.27%), Food & Allied (-2.12%), Bank (-1.92%), and Pharmaceutical (-1.90%), respectively. Block trades contributed 29.8% of the overall market turnover. Unilever Consumer Care Limited (+2.0%) was the most traded share with a turnover of BDT 486 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,229.27	5,333.94	-104.67	-1.96%	-16.3%
DS30	1,859.03	1,900.85	-41.82	-2.20%	-11.2%
DSES	1,143.85	1,165.38	-21.53	-1.85%	-16.1%
CDSET	1,008.95	1,025.56	-16.61	-1.62%	-16.1%

	Advanced	Declined	Unchanged	Total
All Category	6	372	19	397
A Category (Equity)	4	220	13	237
B Category (Equity)	1	99	1	101
N Category (Equity)	0	5	0	5
Z Category (Equity)	1	48	5	54
Mutual Funds	0	29	7	36
Corporate Bonds	0	2	2	4
Treasury Bonds	1	1	1	3

* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,454,446	6,533,681	-1.2%
	Mn USD	54,699	55,370	
Turnover	Mn BDT	2,078	5,528	-62.4%
	Mn USD	18	47	
Volume	Mn Shares	41	168	-75.4%
No. of Trade		28,660	149,286	-80.8%

* Average Interbank Exchange Rate is BDT 118.00 as of Aug 04, 2024

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Figure: Sectorial Turnover (BDT Mn)

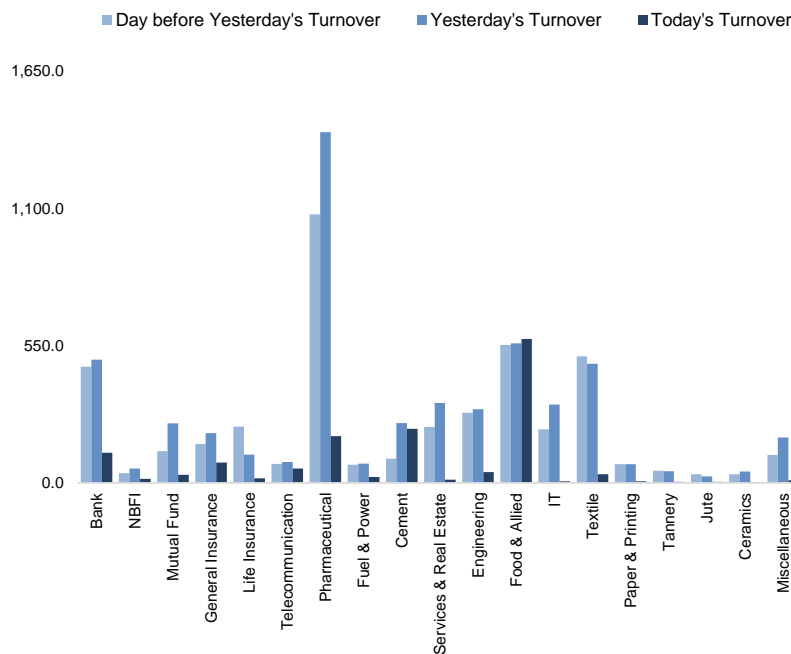
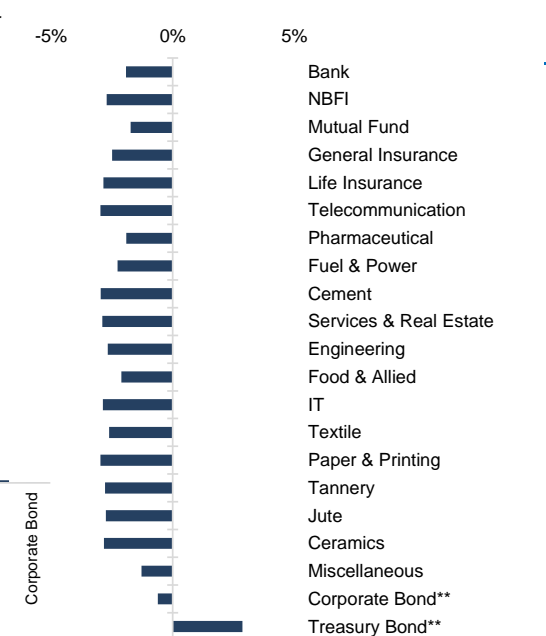


Figure: Sectorial Mcap Change



Market PE 13.9x

Market PB 1.2x

* 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	1,314	1,339	-25.69	-1.92%	36	629,221	9.7%	120.8	8.3%	6.8x	0.6x	GP	333,794	9.4%	44.2	9.4x	4.6x
NBFI	1,089	1,119	-30.42	-2.72%	23	105,395	1.6%	16.1	1.1%	NM	NM	SQURPHARMA	189,612	5.3%	65.7	9.4x	1.6x
Mutual Fund	625	636	-11.02	-1.73%	37	29,188	0.5%	32.7	2.2%	NM	0.6x	WALTONHIL	177,880	5.0%	6.0	13.7x	1.6x
General Insurance	3,066	3,144	-78.27	-2.49%	43	88,807	1.4%	81.3	5.6%	15.9x	1.4x	BATBC	173,934	4.9%	44.2	10.0x	3.3x
Life Insurance	1,875	1,930	-55.04	-2.85%	15	49,835	0.8%	17.9	1.2%	NM	NM	ROBI	120,472	3.4%	12.2	25.8x	1.9x
Telecommunication	4,070	4,195	-124.71	-2.97%	3	471,268	7.3%	57.3	3.9%	11.2x	3.1x	BEXIMCO	103,842	2.9%	0.0	NM	1.2x
Pharmaceutical	3,136	3,197	-60.89	-1.90%	34	594,960	9.2%	187.1	12.8%	15.9x	1.7x	BERGERPBL	82,664	2.3%	0.8	25.5x	5.8x
Fuel & Power	1,163	1,190	-26.99	-2.27%	23	306,110	4.7%	23.6	1.6%	20.1x	0.7x	RENATA	78,991	2.2%	3.3	34.4x	2.4x
Cement	2,199	2,266	-67.08	-2.96%	7	105,022	1.6%	216.4	14.8%	17.7x	2.3x	UPGDCL	72,984	2.1%	2.1	9.7x	2.2x
Services & Real Estate	1,358	1,398	-40.42	-2.89%	9	75,058	1.2%	12.8	0.9%	23.5x	0.5x	MARICO	70,623	2.0%	6.5	14.1x	7.1x
Engineering	2,887	2,966	-79.11	-2.67%	42	333,498	5.2%	43.4	3.0%	14.1x	1.0x	BRACBANK	64,241	1.8%	2.1	6.6x	0.9x
Food & Allied	15,665	16,003	-338.50	-2.12%	21	287,598	4.5%	576.6	39.5%	15.3x	4.9x	ISLAMIBANK	52,486	1.5%	0.0	8.1x	0.7x
IT	2,454	2,527	-72.73	-2.88%	11	32,289	0.5%	6.8	0.5%	26.6x	2.1x	UNILEVERCL	49,803	1.4%	486.3	56.1x	22.7x
Textile	1,151	1,182	-30.89	-2.61%	58	119,399	1.8%	35.1	2.4%	NM	0.8x	BXPHARMA	46,931	1.3%	20.0	8.8x	1.0x
Paper & Printing	6,330	6,524	-193.65	-2.97%	6	29,041	0.4%	6.8	0.5%	40.8x	1.3x	ICB	46,659	1.3%	0.7	NM	1.1x
Tannery	2,285	2,350	-65.46	-2.79%	6	25,026	0.4%	4.5	0.3%	43.1x	2.4x	DUTCHBANGL	39,811	1.1%	4.4	5.2x	0.8x
Jute	16,121	16,577	-456.16	-2.75%	3	3,778	0.1%	4.0	0.3%	NM	NM	EBL	34,497	1.0%	5.0	5.0x	0.8x
Ceramics	464	477	-13.47	-2.82%	5	20,585	0.3%	3.0	0.2%	54.9x	1.2x	POWERGRID	32,806	0.9%	1.2	NM	0.2x
Miscellaneous	4,189	4,244	-54.28	-1.28%	15	228,263	3.5%	10.6	0.7%	38.5x	1.8x	BEACONPHAR	29,314	0.8%	1.3	65.1x	4.8x
Corporate Bond**	7,069	7,113	-43.77	-0.62%	16	41,109	0.6%	1.0	0.1%	NM	NM	PUBALIBANK	28,921	0.8%	1.0	3.4x	0.6x
Treasury Bond**	297	288	+8.27	+2.87%	236	2,878,574	44.6%	1.4	0.1%	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
SHYAMPSUG	146.5	+5.0%	18.2	NM	NM	SQURPHARMA	117,112	8.6%	9.4x	1.6x	UNILEVERCL	2,583.9	+2.0%	486.3	56.1x	22.7x
UNILEVERCL	2,583.9	+2.0%	486.3	56.1x	22.7x	BEXIMCO	69,460	5.1%	NM	1.2x	HEIDELBCEM	308.6	-3.0%	186.0	43.3x	4.3x
BGIC	37.4	+1.9%	2.8	31.7x	1.9x	BATBC	45,948	3.4%	10.0x	3.3x	SQURPHARMA	213.9	-0.1%	65.7	9.4x	1.6x
REPUBLIC	39.8	+1.3%	5.8	17.5x	2.1x	RENATA	35,002	2.6%	34.4x	2.4x	EIL	43.7	+0.5%	46.0	38.7x	2.3x
EIL	43.7	+0.5%	46.0	38.7x	2.3x	ISLAMIBANK	33,649	2.5%	8.1x	0.7x	BATBC	322.1	-3.0%	44.2	10.0x	3.3x
N/A	-	-	-	-	-	BXPHARMA	32,479	2.4%	8.8x	1.0x	GP	247.2	-3.0%	44.2	9.4x	4.6x
N/A	-	-	-	-	-	BRACBANK	32,157	2.4%	6.6x	0.9x	TECHNODRUG	61.6	-3.0%	27.5	NM	2.1x
N/A	-	-	-	-	-	GP	30,004	2.2%	9.4x	4.6x	BXPHARMA	105.2	-3.0%	20.0	8.8x	1.0x
N/A	-	-	-	-	-	LHBL	24,690	1.8%	13.5x	3.3x	MIDLANDBNK	22.4	-2.6%	18.3	12.0x	1.6x
N/A	-	-	-	-	-	EBL	24,199	1.8%	5.0x	0.8x	SHYAMPSUG	146.5	+5.0%	18.2	NM	NM

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)
ZEALBANGLA	97.0	-3.0%	0.3	NM	NM	NBL	16,930	1.2%	NM	1.7x	BRACBANK	41.0	41.0	1.0	7,453	305.56
MONNOAGML	423.7	-3.0%	2.1	NM	3x	CITYBANK	16,830	1.2%	4.1x	0.6x	NTC	319.2	319.2	3.0	650	207.48
EASTRNLLUB	1,374.6	-3.0%	2.3	71.6x	7.9x	BSRMLTD	14,210	1.0%	4.6x	0.6x	TAMIJTEX	119.5	119.5	1.0	200	23.90
PHARMAID	702.0	-3.0%	1.2	43.1x	6.5x	ALARABANK	13,534	1.0%	9.7x	1.0x	CENTRALINS	59.2	59.0	2.0	400	23.64
LOVELLO	90.6	-3.0%	0.5	65.7x	6.9x	PRIMEBANK	12,985	1.0%	4.0x	0.6x	GP	270.0	250.0	3.0	81	21.26
DUTCHBANGL	45.3	-3.0%	4.4	5.2x	0.8x	OLYMPIC	12,616	0.9%	13.9x	2.2x	TECHNODRUG	63.0	61.6	3.0	85	5.33
IFADAUTOS	25.9	-3.0%	0.2	NM	0.7x	UTTARABANK	11,350	0.8%	11.2x	0.8x	SPCERAMICS	31.3	31.3	2.0	100	3.13
ORIONINFU	508.3	-3.0%	3.0	NM	34.1x	ORIONPHARM	11,317	0.8%	14.7x	0.7x	ORIONPHARM	67.5	64.7	2.0	44	2.87
LIBRAINFU	861.4	-3.0%	1.8	NM	1.0x	ROBI	10,738	0.8%	25.8x	1.9x	SHEPHERD	14.1	14.1	1.0	200	2.82
LINDEBD	1,003.9	-3.0%	5.2	26.6x	2.5x						LOVELLO	90.6	90.6	1.0	30	2.72

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BRACBANK	41.0	41.0	305.6	7,453	1
NTC	319.2	319.2	207.5	650	3
TAMIJTEX	119.5	119.5	23.9	200	1
CENTRALINS	59.2	59.0	23.6	400	2
GP	270.0	250.0	21.3	81	3
TECHNODRUG	63.0	61.6	5.3	85	3
SPCERAMICS	31.3	31.3	3.1	100	2
ORIONPHARM	67.5	64.7	2.9	44	2
SHEPHERD	14.1	14.1	2.8	200	1
LOVELLO	90.6	90.6	2.7	30	1
1STPRIMFMF	44.5	44.4	2.7	60	2
MALEKSPIN	29.2	29.2	2.3	80	2
BEXIMCO	115.0	104.1	2.2	20	3
PARAMOUNT	57.3	57.3	2.0	35	1
SQURPHARMA	210.0	210.0	1.8	9	1
ASIATICLAB	55.6	55.6	1.7	30	2
RUPALILIFE	179.6	163.7	1.2	7	2
RUPALILIFE	179.6	163.7	1.2	7	2
FORTUNE	28.8	28.8	1.2	40	2
KOHINOOR	619.1	619.1	1.1	2	1
ORIONINFU	527.0	514.8	1.0	2	2
AGNISYSL	34.0	34.0	1.0	28	1
Total			619.3		40

Important DSE News
OLYMPIC

The company has informed that the Board of Directors has taken the decision to purchase and import of Brand-New Capital Machinery for Snack Food Making Plant with Standard Accessories for making Chanachur having total Production Capacity of 6,600 Metric Tons annually, from M/s. Global Marketing Services, Calcutta, India for total US\$ 18,85,250.00 equivalent to around Tk. 22,71,72,625.00 and installation and commissioning of the same at Company's Kutubpur Factory, under District-Narayanganj.

EXCH

Withdrawal of QIO application by Brain Station 23 PLC.: The Qualified Investor Offer (QIO) application of Brain Station 23 PLC. has been withdrawn by the issuer company. Hence, please disregard the news regarding commencement of electronic subscription of Brain Station 23 PLC.

SUNLIFEINS

(Q2 Un-audited): Referring to their previous news disseminated on 01.08.2024 regarding Q2 Financials, the company has submitted revised PSI which is as follows: Gross premium was Tk. 25.65 crore as on June 30, 2024 and Tk. 39.51 crore as on June 30, 2023. Life fund was Tk. 58.18 crore as on June 30, 2024 and Tk. 45.71 crore as on June 30, 2023. NOCFPS was Tk. (0.57) as on June 30, 2024 and Tk. (1.53) as on June 30, 2023. Previous news is to be ignored.

PRIMETEX

In response to a DSE query dated 29.07.2024 to the company on information regarding their production status, the company has informed, among others, as follows: ".....the company is unable to operate the mill at efficiency level for shortage of raw materials and the project is facing financial crisis. As a result, the company incurred huge losses which is highlighted in our un-audited 1st, 2nd and 3rd quarter (Q1, Q2 & Q3) Financial statements.....Due to shortage of raw materials and electric & gas supply problems we decided at the moment to temporarily shutdown our factory as on 01.12.2023. We did not inform you earlier because we are trying our best to solve out these problems. But unfortunately, we were not able to overcome these problems, but still trying to this date. Under the above circumstances, at this moment we could not provide the information regarding production/operational status of our company for the last 6 (six) months, because production of our company for last 6 (six) months has been temporarily shutdown....."

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BIFC		0.0%	0%	Record Date	12-Aug-24
GP		0.0%	160%	Record Date	13-Aug-24
BERGERPBL		0.0%	500%	Record Date	18-Aug-24
PROVATIINS		0.0%	13%	Record Date	21-Aug-24
PADMALIFE		0.0%	0%	Record Date	22-Aug-24
NHFIL		0.0%	10%	Record Date	22-Aug-24
MARICO		0.0%	1000%	Record Date	25-Aug-24
CLICL		0.0%	3%	Record Date	25-Aug-24

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