

Daily Market Update

The market closed in green today. The benchmark index DSEX (+3.77%) gained 197.16 points and closed at 5,426.42. The blue-chip index DS30 (+4.07%), the Shariah-based index DSES (+2.86%), and the large-cap index CDSET (+3.70%) closed at 1,934.74, 1,176.61, and 1,046.28 points, respectively. All the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 9.11% followed by NBF1 (+9.10%), Food & Allied (+6.41%), Engineering (+6.02%), Bank (+5.07%), Fuel & Power (+4.96%), and Pharmaceutical (+1.85%), respectively. Block trades contributed 2.1% of the overall market turnover. Trust Bank Limited (+9.8%) was the most traded share with a turnover of BDT 484 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,426.42	5,229.27	+197.16	+3.77%	-13.1%
DS30	1,934.74	1,859.03	+75.71	+4.07%	-7.6%
DSES	1,176.61	1,143.85	+32.76	+2.86%	-13.7%
CDSET	1,046.28	1,008.95	+37.33	+3.70%	-13.0%

	Advanced	Declined	Unchanged	Total
All Category	328	60	9	397
A Category (Equity)	193	36	8	237
B Category (Equity)	83	18	0	101
N Category (Equity)	1	4	0	5
Z Category (Equity)	51	2	1	54
Mutual Funds	32	3	2	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,633,488	6,454,446	+2.8%
	Mn USD	56,216	54,699	
Turnover	Mn BDT	7,500	2,078	+260.9%
	Mn USD	64	18	
Volume	Mn Shares	255	41	+515.6%
No. of Trade		148,420	28,660	+417.9%

* Average Interbank Exchange Rate is BDT 118.00 as of Aug 06, 2024

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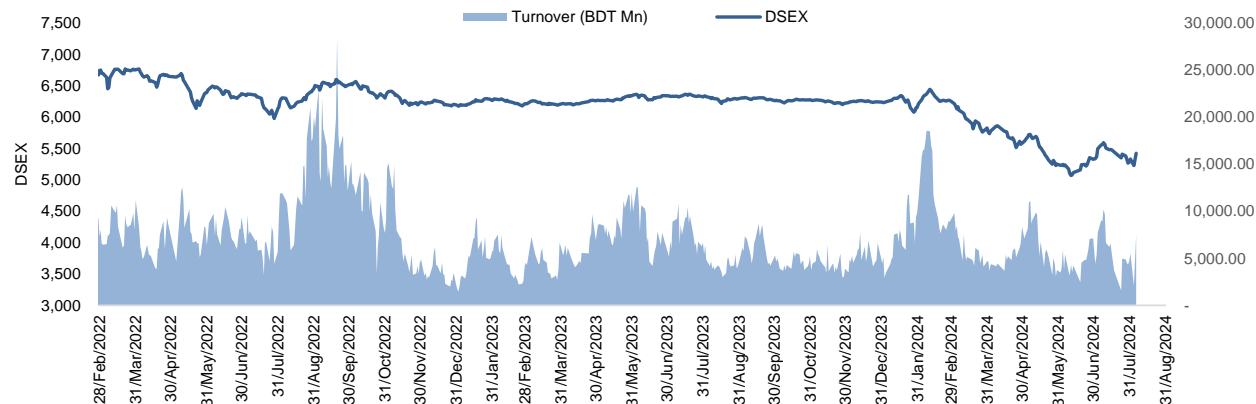


Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

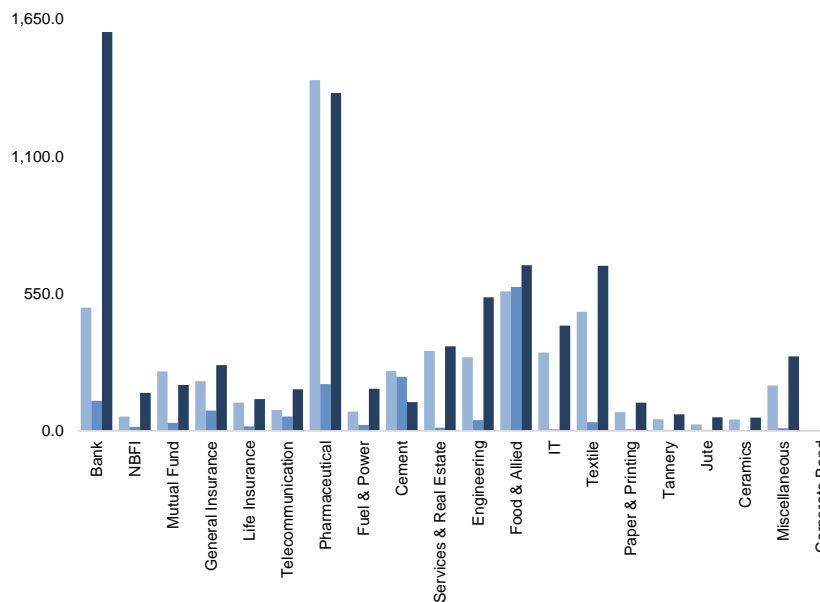
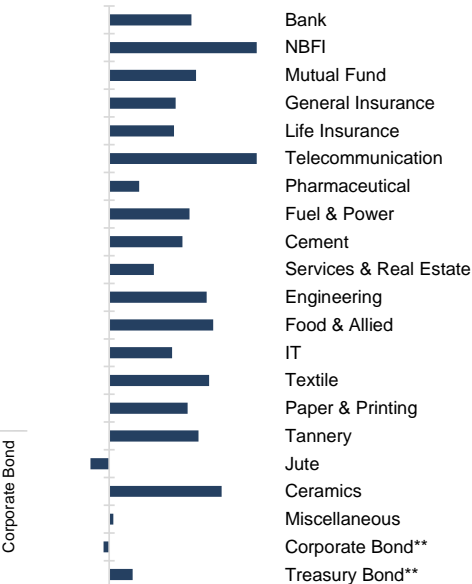


Figure: Sectorial Mcap Change

-5% 0% 5% 10%



Market PE 14.6x
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	1,380	1,314	+66.65	+5.07%	36	661,144	10.0%	1,598.8	21.8%	7.2x	0.7x	GP	362,961	9.7%	75.9	10.3x	5.1x
NBFI	1,188	1,089	+99.05	+9.10%	23	114,983	1.7%	152.9	2.1%	NM	NM	SQURPHARMA	194,044	5.2%	212.2	9.6x	1.6x
Mutual Fund	658	625	+33.45	+5.35%	37	30,750	0.5%	184.0	2.5%	NM	0.6x	WALTONHIL	188,755	5.1%	20.5	14.6x	1.7x
General Insurance	3,191	3,066	+125.55	+4.10%	43	92,443	1.4%	263.8	3.6%	16.6x	1.4x	BATBC	186,948	5.0%	171.1	10.7x	3.6x
Life Insurance	1,950	1,875	+75.09	+4.01%	15	51,831	0.8%	127.0	1.7%	NM	NM	ROBI	132,520	3.5%	82.7	28.4x	2.1x
Telecommunication	4,441	4,070	+370.62	+9.11%	3	514,181	7.8%	166.9	2.3%	12.3x	3.4x	BEXIMCO	103,842	2.8%	0.3	NM	1.2x
Pharmaceutical	3,194	3,136	+57.88	+1.85%	34	605,941	9.1%	1,353.9	18.4%	16.2x	1.7x	RENATA	83,396	2.2%	13.3	36.3x	2.6x
Fuel & Power	1,220	1,163	+57.71	+4.96%	23	321,304	4.8%	169.0	2.3%	21.1x	0.7x	BERGERPBL	82,928	2.2%	7.4	25.6x	5.8x
Cement	2,299	2,199	+99.47	+4.52%	7	109,773	1.7%	115.4	1.6%	18.5x	2.4x	UPGDCL	77,215	2.1%	4.7	10.3x	2.3x
Services & Real Estate	1,395	1,358	+37.44	+2.76%	9	77,128	1.2%	339.1	4.6%	24.2x	0.6x	MARICO	71,234	1.9%	16.3	14.2x	7.2x
Engineering	3,060	2,887	+173.72	+6.02%	42	353,569	5.3%	535.4	7.3%	14.9x	1.1x	LHBL	68,405	1.8%	66.5	14.4x	3.5x
Food & Allied	16,669	15,665	+1004.14	+6.41%	21	306,034	4.6%	663.4	9.0%	16.3x	5.2x	ISLAMIBANK	52,486	1.4%	12.5	8.1x	0.7x
IT	2,549	2,454	+95.11	+3.88%	11	33,540	0.5%	421.7	5.7%	27.7x	2.2x	UNILEVERCL	52,293	1.4%	173.2	58.9x	23.9x
Textile	1,222	1,151	+70.92	+6.16%	58	126,758	1.9%	661.6	9.0%	NM	0.9x	ICB	50,735	1.4%	7.6	NM	1.2x
Paper & Printing	6,636	6,330	+305.84	+4.83%	6	30,445	0.5%	112.9	1.5%	42.8x	1.3x	BXPBARMA	45,548	1.2%	1.7	8.5x	1.0x
Tannery	2,411	2,285	+125.77	+5.50%	6	26,404	0.4%	66.1	0.9%	45.5x	2.5x	DUTCHBANGL	43,062	1.2%	6.3	5.6x	0.9x
Jute	15,935	16,121	-185.52	-1.15%	3	3,734	0.1%	54.7	0.7%	NM	NM	EBL	36,262	1.0%	8.9	5.2x	0.9x
Ceramics	496	464	+32.14	+6.93%	5	22,012	0.3%	53.5	0.7%	58.7x	1.3x	POWERGRID	35,273	0.9%	1.1	NM	0.2x
Miscellaneous	4,200	4,189	+10.88	+0.26%	15	228,856	3.5%	298.8	4.1%	38.6x	1.8x	PUBALIBANK	31,813	0.9%	2.0	3.7x	0.6x
Corporate Bond**	7,045	7,069	-24.79	-0.35%	16	40,650	0.6%	2.2	0.0%	NM	NM	BESTHLDNG	29,235	0.8%	61.6	21.2x	0.5x
Treasury Bond**	301	297	+4.31	+1.45%	236	2,881,585	43.4%	0.4	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
DSSL	9.9	+10.0%	7.9	43.0x	0.5x	SQURPHARMA	117,112	8.6%	9.6x	1.6x	TRUSTBANK	29.2	+9.8%	483.5	5.6x	1.0x
RNSPIN	13.2	+10.0%	0.9	57.1x	1.2x	BEXIMCO	69,460	5.1%	NM	1.2x	UTTARABANK	22.7	+6.1%	437.2	10.9x	0.8x
ROBI	25.3	+10.0%	82.7	28.4x	2.1x	BATBC	45,948	3.4%	10.7x	3.6x	AGNISYSL	32.7	-1.8%	238.0	30.6x	2.0x
PUBALIBANK	27.5	+10.0%	2.0	3.7x	0.6x	RENATA	35,002	2.6%	36.3x	2.6x	TECHNODRUG	59.8	-2.9%	236.5	NM	2.0x
BARKAPOWER	13.2	+10.0%	10.6	8.9x	0.6x	ISLAMIBANK	33,649	2.5%	8.1x	0.7x	SQURPHARMA	218.9	+2.3%	212.2	9.6x	1.6x
GENNEXT	5.5	+10.0%	16.0	NM	0.5x	BXPBARMA	32,479	2.4%	8.5x	1.0x	CITYBANK	20.8	+5.6%	174.9	4.3x	0.7x
ACMEPL	16.5	+10.0%	27.9	NM	1x	BRACBANK	32,157	2.4%	7.1x	1.0x	UNILEVERCL	2,713.1	+5.0%	173.2	58.9x	23.9x
AOL	19.8	+10.0%	14.0	12.7x	1.0x	GP	30,004	2.2%	10.3x	5.1x	BATBC	346.2	+7.5%	171.1	10.7x	3.6x
SAIHAMTEX	15.4	+10.0%	14.3	21.1x	0.4x	LHBL	24,690	1.8%	14.4x	3.5x	SEAPEARL	68.6	-3.0%	168.8	23.0x	3.5x
MIDASFIN	8.8	+10.0%	1.5	NM	1.1x	EBL	24,199	1.8%	5.2x	0.9x	FEKDIL	20.6	+3.0%	158.2	13.2x	1.0x
						PUBALIBANK	20,448	1.5%	3.7x	0.6x						
						NBL	16,930	1.2%	NM	1.7x						
						CITYBANK	16,830	1.2%	4.3x	0.7x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.0x	1.1x						
						PRIMEBANK	12,985	1.0%	4.2x	0.7x						
						OLYMPIC	12,616	0.9%	15.3x	2.5x						
						UTTARABANK	11,350	0.8%	10.9x	0.8x						
						ORIONPHARM	11,317	0.8%	14.3x	0.7x						
						ROBI	10,738	0.8%	28.4x	2.1x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
SONARBAINS	29.1	-3.0%	5.6	29.0x	1.3x	TAMIJTEX	122.6	122.6	1.0	200	24.52					
KOHINOOR	582.6	-3.0%	42.9	51.4x	10x	ORIONINFU	541.0	494.5	9.0	47	23.97					
BEACONPHAR	123.1	-3.0%	19.1	63.1x	4.6x	BRACBANK	39.9	39.0	3.0	432	17.17					
ORIONINFU	493.1	-3.0%	125.3	NM	33.0x	1STPRIMFMF	46.0	46.0	11.0	350	16.10					
GEMINISEA	295.5	-3.0%	62.2	41.9x	13.5x	SPCL	60.0	59.0	7.0	163	9.64					
NRBBANK	13.0	-3.0%	32.5	15.8x	1.0x	IFIC	9.7	9.7	1.0	703	6.82					
LOVELLO	87.9	-3.0%	62.6	63.7x	6.7x	EGEN	33.7	33.7	1.0	182	6.13					
KBPPWBIL	107.7	-3.0%	84.4	NM	9.1x	ORIONPHARM	71.0	65.4	4.0	89	6.03					
SEAPEARL	68.6	-3.0%	168.8	23.0x	3.5x	AGNISYSL	36.4	35.0	3.0	150	5.39					
PARAMOUNT	55.6	-3.0%	16.1	22.9x	2.0x	BXPBARMA	107.5	107.5	1.0	50	5.38					

* 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
TAMIJTEX	122.6	122.6	24.5	200	1
ORIONINFU	541.0	494.5	24.0	47	9
BRACBANK	39.9	39.0	17.2	432	3
1STPRIMFMF	46.0	46.0	16.1	350	11
SPCL	60.0	59.0	9.6	163	7
IFIC	9.7	9.7	6.8	703	1
EGEN	33.7	33.7	6.1	182	1
ORIONPHARM	71.0	65.4	6.0	89	4
AGNISYSL	36.4	35.0	5.4	150	3
BXPHARMA	107.5	107.5	5.4	50	1
SONALIANSH	305.0	305.0	4.3	14	2
NRBBANK	13.9	13.0	3.9	300	3
GP	263.0	263.0	3.7	14	2
LOVELLO	90.6	88.0	3.6	40	2
SQURPHARMA	220.2	220.2	3.0	14	1
AIL	118.0	118.0	2.3	19	1
FEKDIL	20.0	19.4	2.0	100	3
FEKDIL	20.0	19.4	2.0	100	3
GEMINISEA	318.0	318.0	1.8	6	1
KOHINOOR	642.0	620.5	1.3	2	2
BEXIMCO	104.1	104.1	1.0	10	1
SPCERAMICS	34.0	34.0	1.0	30	1
Total			158.1		75

Important DSE News

ASIAINS

(Q2 Un-audited): EPS was Tk. 0.51 for April-June 2024 as against Tk. 1.22 for April-June 2023; EPS was Tk. 0.88 for January-June 2024 as against Tk. 1.43 for January-June 2023. NOCFPS was Tk. 1.29 for January-June 2024 as against Tk. 1.81 for January-June 2023. NAV per share was Tk. 28.03 as on June 30, 2024 and Tk. 27.29 as on June 30, 2023.

VAMLBDMF1

(Q3 Un-audited): EPU was Tk. (1.69) for October 2023-June 2024 as against Tk. 0.12 for October 2022-June 2023. EPU was Tk. (0.77) for April 2024-June 2024 as against Tk. (0.00) for April 2023-June 2023. NOCFPU was Tk. 0.25 for October 2023-June 2024 as against Tk. 0.18 for October 2022-June 2023. NAV per unit at market price was Tk. 9.18 as on June 30, 2024 and Tk. 11.08 as on September 30, 2023. NAV per unit at cost price was Tk. 11.04 as on June 30, 2024 and Tk. 10.94 as on September 30, 2023.

GLDNJMF

(Q2 Un-audited): EPU was Tk. (0.34) for April-June 2024 as against Tk. 0.11 for April-June 2023. EPU was Tk. (1.47) for January-June 2024 as against Tk. 0.15 for January-June 2023. NOCFPU was Tk. 0.21 for January-June 2024 as against Tk. 0.24 for January-June 2023. NAV per unit at market price was Tk. 8.59 as on June 30, 2024 and Tk. 10.30 as on December 31, 2023 and NAV per unit at cost price was Tk. 10.28 as on June 30, 2024 and Tk. 10.39 as on December 31, 2023.

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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