

Daily Market Update

The market closed in green today. The benchmark index DSEX (+3.55%) gained 192.37 points and closed at 5,618.79. The blue-chip index DS30 (+4.52%), the Shariah-based index DSES (+3.61%), and the large-cap index CDSET (+4.61%) closed at 2,022.17, 1,219.14, and 1,094.54 points, respectively. All the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 9.42% followed by Telecommunication (+9.04%), Food & Allied (+6.90%), Bank (+4.67%), Fuel & Power (+3.35%), Pharmaceutical (+2.87%), and Engineering (+2.69%), respectively. Block trades contributed 3.8% of the overall market turnover. British American Tobacco Bangladesh Company Limited (+8.6%) was the most traded share with a turnover of BDT 549 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,618.79	5,426.42	+192.37	+3.55%	-10.0%
DS30	2,022.17	1,934.74	+87.43	+4.52%	-3.4%
DSES	1,219.14	1,176.61	+42.53	+3.61%	-10.6%
CDSET	1,094.54	1,046.28	+48.26	+4.61%	-9.0%

	Advanced	Declined	Unchanged	Total
All Category	266	114	16	396
A Category (Equity)	170	57	9	236
B Category (Equity)	65	31	5	101
N Category (Equity)	0	5	0	5
Z Category (Equity)	31	21	2	54
Mutual Funds	33	2	2	37
Corporate Bonds	1	1	0	2
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,790,579	6,633,488	+2.4%
	Mn USD	57,547	56,216	
Turnover	Mn BDT	7,756	7,500	+3.4%
	Mn USD	66	64	
Volume	Mn Shares	272	255	+6.8%
No. of Trade		173,233	148,420	+16.7%

* Average Interbank Exchange Rate is BDT 118.00 as of Aug 07, 2024

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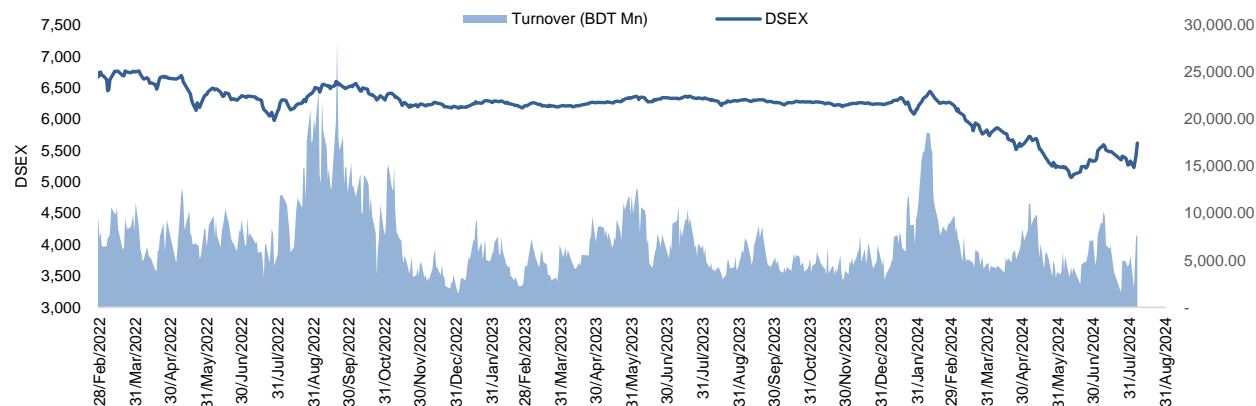


Figure: Sectorial Turnover (BDT Mn)

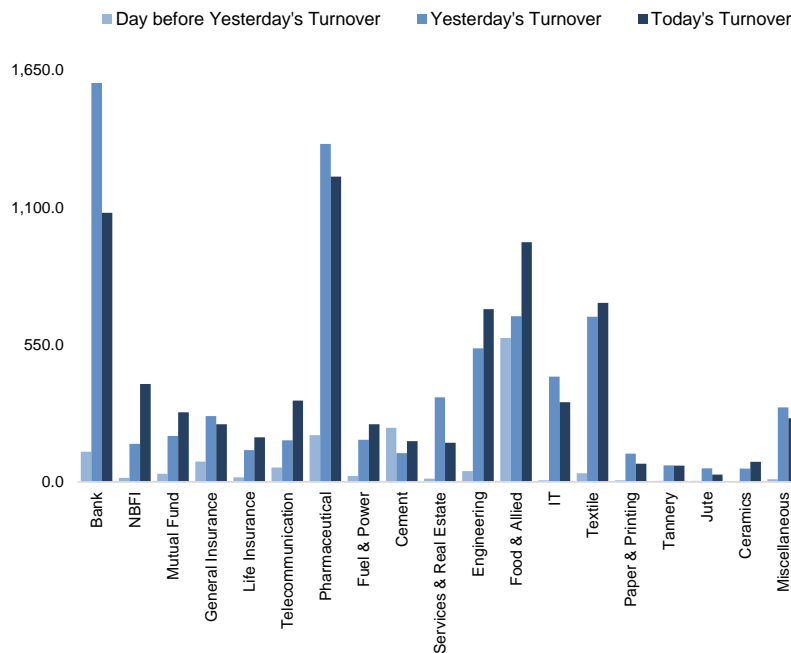
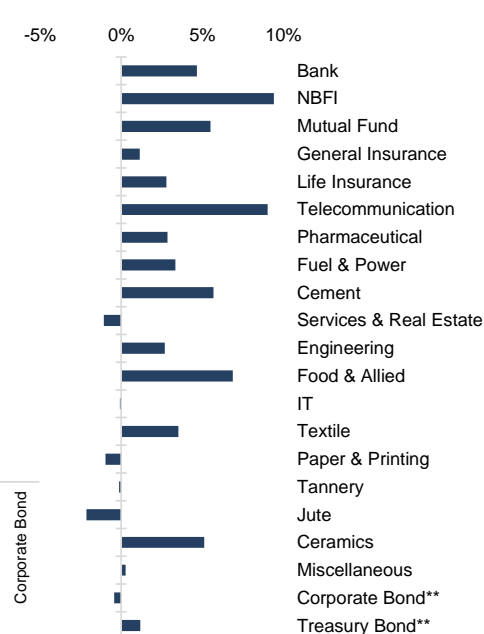


Figure: Sectorial Mcap Change



Market PE 15.3x
Market PB 1.3x

* 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	1,445	1,380	+64.45	+4.67%	36	692,017	10.2%	1,078.1	14.4%	7.5x	0.7x	GP	394,693	10.1%	65.5	11.2x	5.5x
NBFI	1,300	1,188	+111.91	+9.42%	23	125,817	1.9%	392.4	5.3%	NM	NM	SQURPHARMA	203,884	5.2%	380.2	10.1x	1.7x
Mutual Fund	694	658	+36.26	+5.51%	37	32,444	0.5%	279.0	3.7%	NM	0.6x	BATBC	203,094	5.2%	549.4	11.6x	3.9x
General Insurance	3,228	3,191	+36.45	+1.14%	43	93,499	1.4%	231.4	3.1%	16.8x	1.4x	WALTONHIL	191,148	4.9%	22.2	14.8x	1.8x
Life Insurance	2,004	1,950	+54.53	+2.80%	15	53,281	0.8%	178.8	2.4%	NM	NM	ROBI	145,615	3.7%	228.5	31.2x	2.3x
Telecommunication	4,842	4,441	+401.54	+9.04%	3	560,673	8.3%	325.4	4.4%	13.4x	3.7x	BEXIMCO	103,842	2.7%	0.0	NM	1.2x
Pharmaceutical	3,285	3,194	+91.51	+2.87%	34	623,304	9.2%	1,223.9	16.4%	16.7x	1.8x	RENATA	87,892	2.3%	93.3	38.3x	2.7x
Fuel & Power	1,261	1,220	+40.88	+3.35%	23	332,066	4.9%	230.6	3.1%	21.8x	0.7x	BERGERPBL	83,480	2.1%	6.8	25.7x	5.8x
Cement	2,429	2,299	+130.88	+5.69%	7	116,023	1.7%	163.4	2.2%	19.6x	2.6x	UPGDCL	78,259	2.0%	9.7	10.4x	2.3x
Services & Real Estate	1,380	1,395	-14.95	-1.07%	9	76,302	1.1%	157.0	2.1%	23.9x	0.5x	BRACBANK	75,567	1.9%	119.4	7.8x	1.1x
Engineering	3,143	3,060	+82.20	+2.69%	42	363,066	5.3%	691.8	9.3%	15.3x	1.1x	MARICO	72,066	1.8%	45.3	14.4x	7.3x
Food & Allied	17,818	16,669	+1149.38	+6.90%	21	327,136	4.8%	960.5	12.9%	17.4x	5.5x	ISLAMIBANK	57,638	1.5%	61.3	8.9x	0.8x
IT	2,548	2,549	-1.86	-0.07%	11	33,516	0.5%	319.5	4.3%	27.7x	2.2x	ICB	55,678	1.4%	12.0	NM	1.3x
Textile	1,265	1,222	+43.08	+3.53%	58	131,227	1.9%	716.9	9.6%	NM	0.9x	UNILEVERCL	54,905	1.4%	98.1	61.9x	25.1x
Paper & Printing	6,571	6,636	-64.46	-0.97%	6	30,149	0.4%	72.4	1.0%	42.4x	1.3x	DUTCHBANGL	46,402	1.2%	21.0	6.1x	1.0x
Tannery	2,408	2,411	-3.07	-0.13%	6	26,370	0.4%	64.8	0.9%	45.4x	2.5x	BXPHARMA	44,210	1.1%	20.6	8.3x	1.0x
Jute	15,595	15,935	-340.91	-2.14%	3	3,654	0.1%	29.7	0.4%	NM	NM	POWERGRID	37,740	1.0%	6.9	NM	0.2x
Ceramics	521	496	+25.43	+5.13%	5	23,141	0.3%	80.7	1.1%	61.7x	1.4x	EBL	37,620	1.0%	37.1	5.4x	0.9x
Miscellaneous	4,211	4,200	+11.20	+0.27%	15	229,466	3.4%	254.9	3.4%	38.7x	1.8x	PUBALIBANK	31,003	0.8%	5.3	3.7x	0.6x
Corporate Bond**	7,014	7,045	-30.75	-0.44%	16	40,157	0.6%	0.5	0.0%	NM	NM	CITYBANK	30,309	0.8%	209.9	4.7x	0.7x
Treasury Bond**	305	301	+3.55	+1.18%	236	2,876,835	42.4%	9.9	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
APOLOISPAT	4.4	+10.0%	6.1	NM	0.2x	SQURPHARMA	117,112	8.6%	10.1x	1.7x	BATBC	376.1	+8.6%	549.4	11.6x	3.9x
MONNOCERA	83.6	+10.0%	13.7	24.6x	1.0x	BEXIMCO	69,460	5.1%	NM	1.2x	SQURPHARMA	230.0	+5.1%	380.2	10.1x	1.7x
AFTABAUTO	41.8	+10.0%	93.0	NM	0.8x	BATBC	45,948	3.4%	11.6x	3.9x	ROBI	27.8	+9.9%	228.5	31.2x	2.3x
ACIFARMULA	138.6	+10.0%	21.1	23.2x	2.0x	RENATA	35,002	2.6%	38.3x	2.7x	CITYBANK	22.5	+8.2%	209.9	4.7x	0.7x
FAREASTLIF	34.1	+10.0%	9.8	NM	NM	ISLAMIBANK	33,649	2.5%	8.9x	0.8x	DBH	37.1	+9.8%	133.4	8.2x	0.8x
DSHGARME	82.6	+10.0%	1.4	NM	4.5x	BXPHARMA	32,479	2.4%	8.3x	1.0x	ACMELAB	81.7	+10.0%	124.2	7.1x	0.7x
PRAGATIINS	57.3	+10.0%	5.8	11.6x	1x	BRACBANK	32,157	2.4%	7.8x	1.1x	BRACBANK	42.7	+9.8%	119.4	7.8x	1.1x
ACI	145.5	+10.0%	14.7	NM	1.4x	GP	30,004	2.2%	11.2x	5.5x	AGNISYSL	31.9	-2.4%	117.0	29.8x	1.9x
IDLC	35.3	+10.0%	12.9	9.5x	0.8x	LHBL	24,690	1.8%	15.7x	3.9x	IBNSINA	285.4	+8.7%	117.0	12.9x	2.7x
ACMELAB	81.7	+10.0%	124.2	7.1x	0.7x	EBL	24,199	1.8%	5.4x	0.9x	LHBL	64.2	+9.0%	99.6	15.7x	3.9x
						PUBALIBANK	20,448	1.5%	3.7x	0.6x						
						NBL	16,930	1.2%	NM	1.8x						
						CITYBANK	16,830	1.2%	4.7x	0.7x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.2x	1.1x						
						PRIMEBANK	12,985	1.0%	4.4x	0.7x						
						OLYMPIC	12,616	0.9%	16.8x	2.7x						
						UTTARABANK	11,350	0.8%	11.8x	0.8x						
						ORIONPHARM	11,317	0.8%	13.9x	0.7x						
						ROBI	10,738	0.8%	31.2x	2.3x						
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)
CRYSTALINS	77.8	-3.0%	0.9	27.0x	3.2x						UNILEVERCL	2,660.0	2,660.0	1.0	38	99.75
SONALIPAPR	266.1	-3.0%	24.5	80.9x	2x						RENATA	735.0	735.0	2.0	100	73.50
SUNLIFEINS	55.2	-3.0%	17.8	NM	NM						GP	292.3	292.3	1.0	65	19.00
KOHINOOR	565.2	-3.0%	24.2	49.9x	9.8x						RELIANCE1	19.5	18.6	5.0	752	14.51
ORIONINFU	478.4	-3.0%	1.6	NM	32.1x						UCB	9.2	9.2	1.0	1,550	14.26
BEACHHATCH	81.4	-3.0%	7.9	42.2x	6.5x						RUPALILIFE	169.0	149.2	9.0	74	11.85
GEMINISEA	286.7	-3.0%	3.2	40.6x	13.1x						EIL	43.0	43.0	2.0	271	11.65
INTRACO	32.6	-3.0%	5.8	41.8x	2.6x						BEACONPHAR	119.5	119.5	1.0	63	7.58
HEIDELCEM	290.6	-3.0%	8.4	40.8x	4.0x						PREMIERCEM	64.7	64.1	3.0	110	7.03
KBPPWBIL	104.5	-3.0%	0.3	NM	8.8x						DHAKABANK	11.7	11.7	2.0	261	3.06

* 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	Minimum	Turnover	Quantity	No. of	Important DSE News
	Price (BDT)	Price	(BDT Mn)	('000)	Trade	
UNILEVERCL	2,660.0	2,660.0	99.8	38	1	
RENATA	735.0	735.0	73.5	100	2	
GP	292.3	292.3	19.0	65	1	
RELIANCE1	19.5	18.6	14.5	752	5	
UCB	9.2	9.2	14.3	1,550	1	
RUPALILIFE	169.0	149.2	11.8	74	9	
EIL	43.0	43.0	11.7	271	2	
BEACONPHAR	119.5	119.5	7.6	63	1	
PREMIERCEM	64.7	64.1	7.0	110	3	
DHAKABANK	11.7	11.7	3.1	261	2	
SHEPHERD	14.6	14.6	2.9	200	1	
PTL	62.1	61.8	2.5	40	2	
LOVELLO	95.0	95.0	2.4	25	2	
OIMEX	28.9	26.9	2.2	81	2	
NPOLYMER	45.0	45.0	1.8	40	1	
CRYSTALINS	88.2	88.2	1.7	19	1	
AGNISYSL	33.7	33.7	1.5	45	1	
AGNISYSL	33.7	33.7	1.5	45	1	
SAIHAMCOT	14.4	14.4	1.4	97	1	
BATBC	350.0	350.0	1.3	4	1	
ORIONINFU	535.0	478.9	1.2	2	2	
SPCL	72.0	72.0	1.1	15	1	
Total			294.2		59	

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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