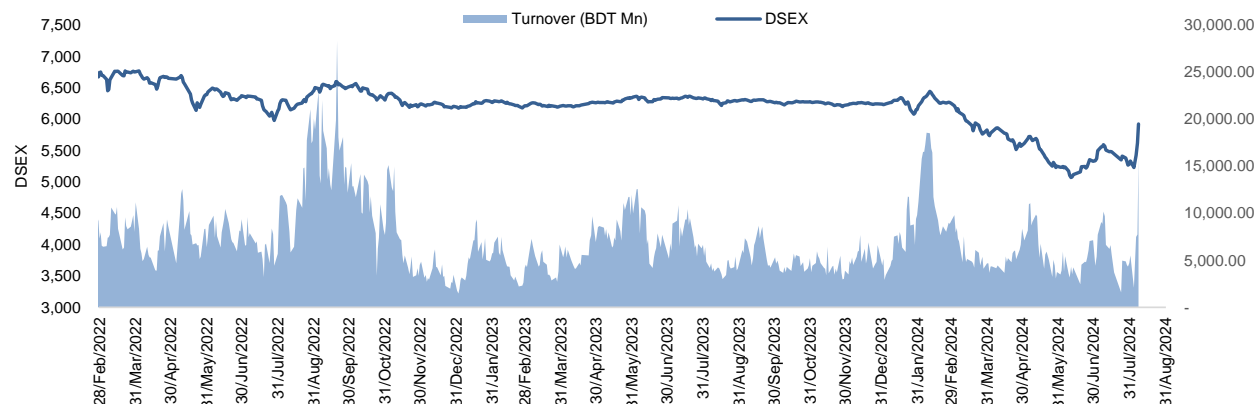


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+5.45%) gained 306.02 points and closed at 5,924.81. The blue-chip index DS30 (+5.47%), the Shariah-based index DSES (+4.57%), and the large-cap index CDSET (+5.26%) closed at 2,132.73, 1,274.91, and 1,152.16 points, respectively. All the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 9.03% followed by NBF1 (+8.12%), Bank (+8.03%), Food & Allied (+7.50%), Fuel & Power (+7.18%), Engineering (+5.26%), and Pharmaceutical (+2.46%), respectively. Block trades contributed 1.3% of the overall market turnover. The City Bank Ltd. (+8.0%) was the most traded share with a turnover of BDT 639 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,924.81	5,618.79	+306.02	+5.45%	-5.1%
DS30	2,132.73	2,022.17	+110.56	+5.47%	+1.9%
DSES	1,274.91	1,219.14	+55.77	+4.57%	-6.5%
CDSET	1,152.16	1,094.54	+57.62	+5.26%	-4.2%

	Advanced	Declined	Unchanged	Total
All Category	364	27	7	398
A Category (Equity)	219	12	6	237
B Category (Equity)	95	6	0	101
N Category (Equity)	4	1	0	5
Z Category (Equity)	46	8	1	55
Mutual Funds	34	1	2	37
Corporate Bonds	1	1	0	2
Treasury Bonds	1	0	0	1

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,039,131	6,790,579	+3.7%
	Mn USD	59,654	57,547	
Turnover	Mn BDT	16,065	7,756	+107.1%
	Mn USD	136	66	
Volume	Mn Shares	549	272	+101.7%
No. of Trade		316,519	173,233	+82.7%

\* Average Interbank Exchange Rate is BDT 118.00 as of Aug 08, 2024

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Figure: Sectorial Turnover (BDT Mn)

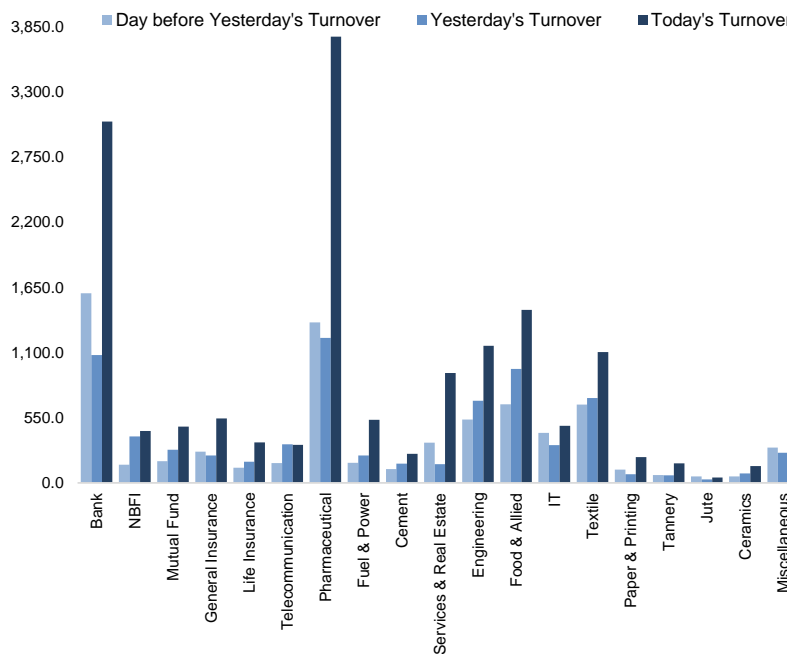
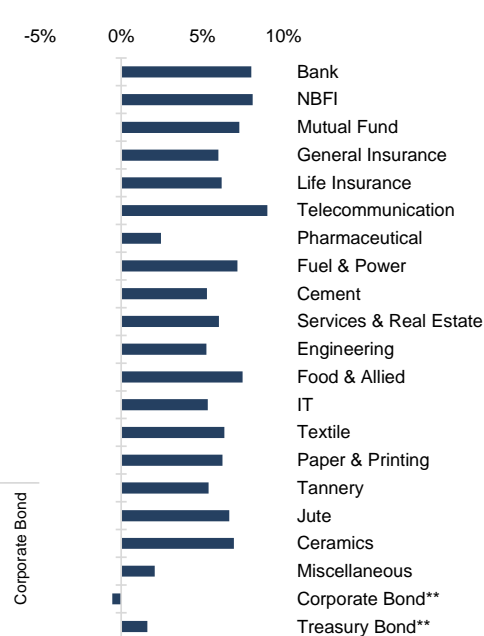


Figure: Sectorial Mcap Change



Market PE 16.2x  
Market PB 1.4x

\* 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	1,561	1,445	+116.03	+8.03%	36	747,598	10.6%	3,048.3	19.2%	8.1x	0.7x	GP	429,125	10.4%	94.9	12.1x	6.0x
NBFI	1,405	1,300	+105.53	+8.12%	23	136,032	1.9%	438.1	2.8%	NM	NM	BATBC	220,806	5.3%	621.5	12.7x	4.2x
Mutual Fund	745	694	+50.62	+7.29%	37	34,809	0.5%	474.4	3.0%	NM	0.7x	SQRPHARMA	209,557	5.1%	475.7	10.4x	1.7x
General Insurance	3,421	3,228	+193.45	+5.99%	43	99,103	1.4%	544.6	3.4%	17.8x	1.5x	WALTONHIL	201,538	4.9%	42.9	15.6x	1.8x
Life Insurance	2,129	2,004	+124.38	+6.21%	15	56,588	0.8%	342.6	2.2%	NM	NM	ROBI	159,757	3.9%	191.0	34.3x	2.5x
Telecommunication	5,279	4,842	+437.05	+9.03%	3	611,276	8.7%	321.0	2.0%	14.6x	4.1x	BEXIMCO	103,842	2.5%	0.0	NM	1.2x
Pharmaceutical	3,366	3,285	+80.90	+2.46%	34	638,654	9.1%	3,764.7	23.7%	17.1x	1.8x	RENATA	86,516	2.1%	84.0	37.7x	2.7x
Fuel & Power	1,352	1,261	+90.54	+7.18%	23	355,904	5.1%	531.6	3.4%	23.3x	0.8x	UPGDCL	86,085	2.1%	15.8	11.5x	2.5x
Cement	2,558	2,429	+128.40	+5.29%	7	122,155	1.7%	245.6	1.5%	20.6x	2.7x	BERGERPBL	85,697	2.1%	23.3	26.4x	6.0x
Services & Real Estate	1,463	1,380	+83.15	+6.03%	9	80,899	1.1%	928.1	5.9%	25.3x	0.6x	BRACBANK	82,999	2.0%	290.2	8.5x	1.2x
Engineering	3,308	3,143	+165.26	+5.26%	42	382,159	5.4%	1,155.6	7.3%	16.1x	1.2x	MARICO	72,743	1.8%	90.2	14.5x	7.3x
Food & Allied	19,154	17,818	+1336.05	+7.50%	21	351,665	5.0%	1,460.7	9.2%	18.7x	5.9x	ISLAMIBANK	63,273	1.5%	25.8	9.7x	0.9x
IT	2,683	2,548	+135.93	+5.34%	11	35,304	0.5%	481.6	3.0%	29.1x	2.3x	ICB	59,321	1.4%	17.6	NM	1.4x
Textile	1,345	1,265	+80.55	+6.37%	58	139,585	2.0%	1,103.1	7.0%	NM	0.9x	UNILEVERCL	57,570	1.4%	129.0	64.9x	26.3x
Paper & Printing	6,982	6,571	+410.91	+6.25%	6	32,034	0.5%	216.9	1.4%	45.0x	1.4x	DUTCHBANGL	50,093	1.2%	37.9	6.5x	1.0x
Tannery	2,538	2,408	+129.99	+5.40%	6	27,794	0.4%	164.7	1.0%	47.9x	2.6x	BXPHARMA	42,916	1.0%	32.3	8.1x	0.9x
Jute	16,634	15,595	+1039.82	+6.67%	3	3,898	0.1%	45.7	0.3%	NM	NM	POWERGRID	40,664	1.0%	13.3	NM	0.3x
Ceramics	557	521	+36.23	+6.95%	5	24,749	0.4%	142.4	0.9%	66.0x	1.5x	EBL	39,386	1.0%	77.3	5.7x	0.9x
Miscellaneous	4,299	4,211	+87.29	+2.07%	15	234,222	3.3%	437.5	2.8%	39.6x	1.8x	CITYBANK	32,734	0.8%	638.6	5.0x	0.8x
Corporate Bond**	6,975	7,014	-38.91	-0.55%	16	39,620	0.6%	2.0	0.0%	NM	NM	PUBALIBANK	31,813	0.8%	17.2	3.7x	0.6x
Treasury Bond**	310	305	+4.93	+1.62%	236	2,884,643	41.0%	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
JAMUNABANK	19.8	+10.0%	43.8	5.8x	0.7x	SQRPHARMA	117,112	8.6%	10.4x	1.7x	CITYBANK	24.3	+8.0%	638.6	5.0x	0.8x
GENNEXT	6.6	+10.0%	52.8	NM	0.6x	BEXIMCO	69,460	5.1%	NM	1.2x	BATBC	408.9	+8.7%	621.5	12.7x	4.2x
UPGDCL	148.5	+10.0%	15.8	11.5x	2.5x	BATBC	45,948	3.4%	12.7x	4.2x	TECHNODRUG	57.3	-1.4%	554.8	NM	2.0x
RNSPIN	15.4	+10.0%	1.5	66.6x	1.5x	RENATA	35,002	2.6%	37.7x	2.7x	SQRPHARMA	236.4	+2.8%	475.7	10.4x	1.7x
BEACONPHAR	136.4	+10.0%	47.8	69.9x	5.1x	ISLAMIBANK	33,649	2.5%	9.7x	0.9x	SEAPEARL	65.9	-1.1%	431.7	22.1x	3.4x
TITASGAS	27.5	+10.0%	19.7	NM	0.4x	BXPHARMA	32,479	2.4%	8.1x	0.9x	JHRML	74.2	+4.7%	379.2	29.1x	2.2x
EBLNRBMF	4.4	+10.0%	5.4	NM	0x	BRACBANK	32,157	2.4%	8.5x	1.2x	ORIONPHARM	63.9	+4.8%	360.0	14.6x	0.7x
UTTARAFIN	22.0	+10.0%	1.1	NM	0.3x	GP	30,004	2.2%	12.1x	6.0x	MTB	14.0	+9.4%	345.0	4.7x	0.6x
ISLAMICFIN	11.0	+10.0%	1.3	NM	1.0x	LHBL	24,690	1.8%	16.5x	4.1x	BRACBANK	46.9	+9.8%	290.2	8.5x	1.2x
PADMALIFE	23.1	+10.0%	3.1	NM	NM	EBL	24,199	1.8%	5.7x	0.9x	ORIONINFU	488.9	+2.2%	289.9	NM	32.8x

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)
GEMINISEA	278.1	-3.0%	18.7	39.4x	12.7x	PUBALIBANK	20,448	1.5%	3.7x	0.6x	GP	317.8	310.0	20.0	172	54.72
HAMI	140.5	-3.0%	0.7	NM	15x	NBL	16,930	1.2%	NM	2.0x	PRAGATILIF	146.0	130.0	6.0	206	28.34
AIL	106.0	-2.9%	92.7	42.9x	4.4x	CITYBANK	16,830	1.2%	5.0x	0.8x	SPCL	65.5	59.0	10.0	209	13.13
BXPHARMA	96.2	-2.9%	32.3	8.1x	0.9x	BSRMLTD	14,210	1.0%	4.6x	0.6x	BRACBANK	44.5	44.0	2.0	280	12.35
1STPRIMFMF	43.2	-2.9%	30.4	NM	4.1x	ALARABANK	13,534	1.0%	11.2x	1.2x	BXPHARMA	96.2	96.2	3.0	124	11.92
NEWLINE	45.0	-2.8%	0.0	86.5x	1.8x	PRIMEBANK	12,985	1.0%	4.7x	0.8x	IBNSINA	290.0	290.0	2.0	33	9.52
LIBRAINFU	865.1	-2.8%	31.3	NM	1.0x	OLYMPIC	12,616	0.9%	18.5x	3.0x	BEXIMCO	115.0	104.1	6.0	72	7.61
SPCERAMICS	28.7	-2.7%	0.8	NM	0.9x	UTTARABANK	11,350	0.8%	12.9x	0.9x	IFIC	8.5	8.3	7.0	885	7.43
JUTESPINN	253.1	-2.7%	0.7	NM	NM	ORIONPHARM	11,317	0.8%	14.6x	0.7x	LOVELLO	89.9	83.5	5.0	77	6.64
MEGCONMILK	29.6	-2.6%	2.8	NM	NM	ROBI	10,738	0.8%	34.3x	2.5x	MLDYEING	13.2	13.2	1.0	500	6.60

\* 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
GP	317.8	310.0	54.7	172	20
PRAGATILIF	146.0	130.0	28.3	206	6
SPCL	65.5	59.0	13.1	209	10
BRACBANK	44.5	44.0	12.3	280	2
BXPHERMA	96.2	96.2	11.9	124	3
IBNSINA	290.0	290.0	9.5	33	2
BEXIMCO	115.0	104.1	7.6	72	6
IFIC	8.5	8.3	7.4	885	7
LOVELLO	89.9	83.5	6.6	77	5
MLDYING	13.2	13.2	6.6	500	1
PREMIERCEM	66.6	63.8	5.2	78	3
BEACHHATCH	81.4	79.0	5.0	63	2
SEAPEARL	65.0	65.0	2.6	40	1
PRIMELIFE	38.5	38.5	2.5	65	1
TECHNODRUG	61.0	59.0	2.2	36	2
AGNISYSL	34.0	34.0	1.7	51	1
CENTRALINS	56.8	50.2	1.6	31	3
CENTRALINS	56.8	50.2	1.6	31	3
GQBALLPEN	165.0	162.2	1.6	10	2
ASIATICLAB	50.9	50.9	1.5	30	2
SHEPHERD	15.0	15.0	1.5	100	1
CAPITECGBF	14.2	14.2	1.4	100	2
<b>Total</b>			<b>205.7</b>		<b>112</b>

**Important DSE News**
**NRBBANK**

The Company will be placed in 'A' category from existing 'N' category with effect from August 11, 2024 as the Company has reported disbursement of 10% Cash Dividend for General shareholders and 6% Cash Dividend for Sponsors and Directors for the year ended 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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