

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.54%) gained 91.09 points and closed at 6,015.91. The blue-chip index DS30 (+2.42%), the Shariah-based index DSES (+0.81%), and the large-cap index CDSET (+2.05%) closed at 2,184.36, 1,285.27, and 1,175.83 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 8.79% followed by NBF1 (+4.72%), Bank (+4.11%), Food & Allied (+3.31%), Engineering (+1.82%), Fuel & Power (+0.72%), and Pharmaceutical (-0.23%), respectively. Block trades contributed 1.6% of the overall market turnover. Grameenphone Ltd. (+8.7%) was the most traded share with a turnover of BDT 1,387 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,015.91	5,924.81	+91.09	+1.54%	-3.7%
DS30	2,184.36	2,132.73	+51.62	+2.42%	+4.3%
DSES	1,285.27	1,274.91	+10.36	+0.81%	-5.8%
CDSET	1,175.83	1,152.16	+23.67	+2.05%	-2.2%

	Advanced	Declined	Unchanged	Total
All Category	173	207	20	400
A Category (Equity)	104	121	14	239
B Category (Equity)	34	64	3	101
N Category (Equity)	2	3	0	5
Z Category (Equity)	33	19	3	55
Mutual Funds	21	13	3	37
Corporate Bonds	2	1	0	3
Treasury Bonds	0	2	0	2

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,133,528	7,039,131	+1.3%
	Mn USD	60,454	59,654	
Turnover	Mn BDT	20,101	16,065	+25.1%
	Mn USD	170	136	
Volume	Mn Shares	760	549	+38.4%
No. of Trade		359,658	316,519	+13.6%

* Average Interbank Exchange Rate is BDT 118.00 as of Aug 11, 2024

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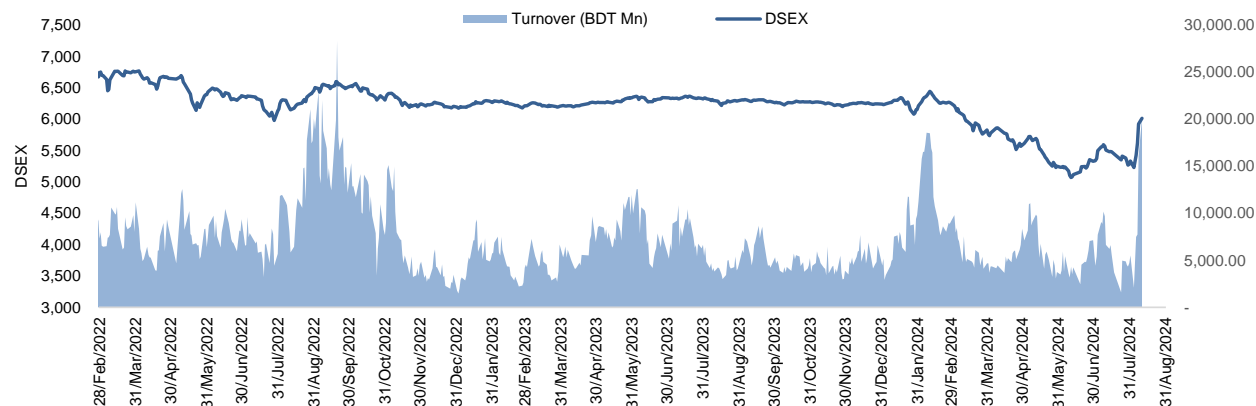


Figure: Sectorial Turnover (BDT Mn)

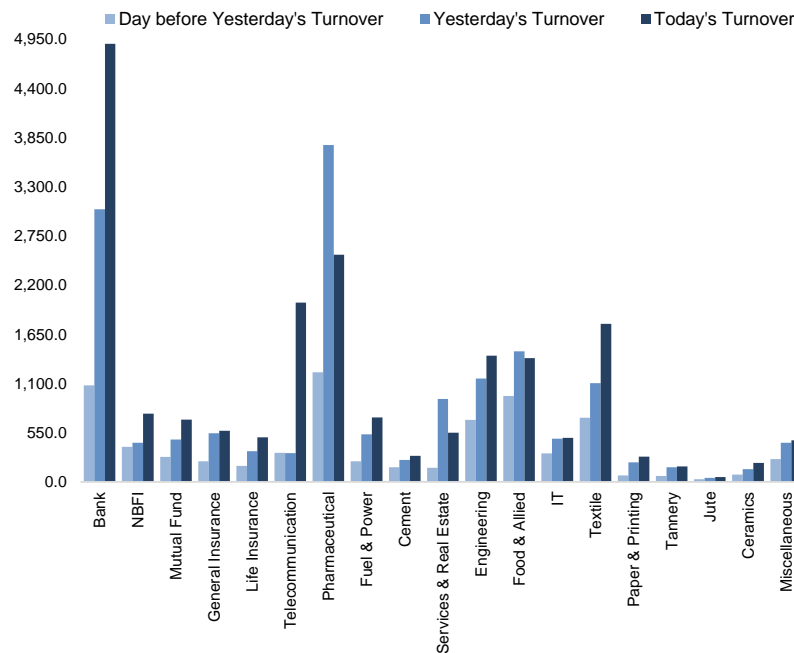
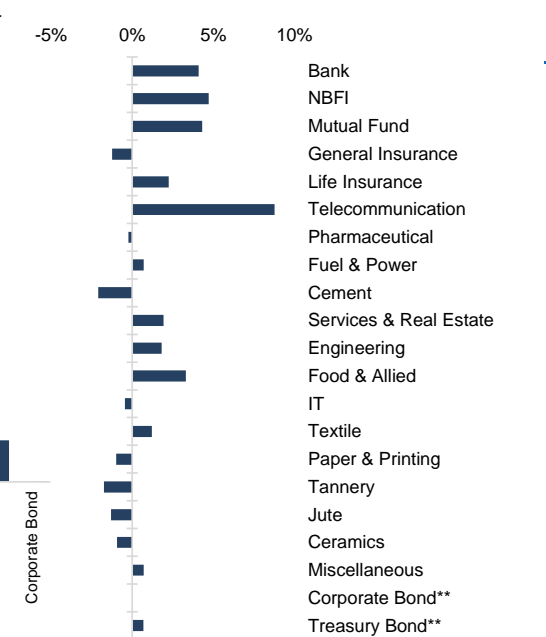


Figure: Sectorial Mcap Change



Market PE 16.6x
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	1,625	1,561	+64.13	+4.11%	36	778,314	10.9%	4,898.0	24.8%	8.4x	0.8x	GP	466,664	11.0%	1,386.8	13.2x	6.5x
NBFI	1,472	1,405	+66.33	+4.72%	23	142,453	2.0%	763.3	3.9%	NM	NM	BATBC	230,310	5.4%	629.0	13.2x	4.4x
Mutual Fund	777	745	+32.22	+4.32%	37	36,314	0.5%	695.8	3.5%	NM	0.7x	WALTONHIL	206,930	4.9%	42.8	16.0x	1.9x
General Insurance	3,379	3,421	-42.47	-1.24%	43	97,873	1.4%	570.6	2.9%	17.6x	1.5x	SQURPHARMA	206,543	4.9%	476.0	10.2x	1.7x
Life Insurance	2,177	2,129	+47.99	+2.25%	15	57,864	0.8%	498.4	2.5%	NM	NM	ROBI	174,947	4.1%	548.9	37.5x	2.7x
Telecommunication	5,743	5,279	+463.80	+8.79%	3	664,978	9.3%	2,004.0	10.1%	15.9x	4.4x	BEXIMCO	103,842	2.4%	0.4	NM	1.2x
Pharmaceutical	3,358	3,366	-7.74	-0.23%	34	637,187	8.9%	2,540.5	12.8%	17.0x	1.8x	UPGDCL	88,461	2.1%	39.5	11.8x	2.6x
Fuel & Power	1,362	1,352	+9.68	+0.72%	23	358,454	5.0%	721.1	3.6%	23.5x	0.8x	BRACBANK	87,778	2.1%	608.1	9.0x	1.2x
Cement	2,504	2,558	-53.75	-2.10%	7	119,588	1.7%	290.4	1.5%	20.2x	2.6x	RENATA	87,341	2.1%	54.5	38.1x	2.7x
Services & Real Estate	1,491	1,463	+28.24	+1.93%	9	82,460	1.2%	550.6	2.8%	25.8x	0.6x	BERGERPBL	86,801	2.0%	9.5	26.8x	6.0x
Engineering	3,368	3,308	+60.34	+1.82%	42	389,130	5.5%	1,409.9	7.1%	16.4x	1.2x	MARICO	74,932	1.8%	65.4	15.0x	7.5x
Food & Allied	19,787	19,154	+633.14	+3.31%	21	363,290	5.1%	1,384.2	7.0%	19.3x	6.1x	ISLAMIBANK	69,552	1.6%	283.5	10.7x	0.9x
IT	2,671	2,683	-12.19	-0.45%	11	35,144	0.5%	493.2	2.5%	29.0x	2.3x	ICB	62,182	1.5%	31.5	NM	1.5x
Textile	1,362	1,345	+16.27	+1.21%	58	141,272	2.0%	1,767.0	8.9%	NM	1.0x	UNILEVERCL	60,252	1.4%	65.5	67.9x	27.5x
Paper & Printing	6,914	6,982	-68.72	-0.98%	6	31,719	0.4%	282.3	1.4%	44.6x	1.4x	DUTCHBANGL	48,862	1.1%	45.4	6.4x	1.0x
Tannery	2,493	2,538	-44.36	-1.75%	6	27,308	0.4%	172.5	0.9%	47.1x	2.6x	BXPHARMA	41,667	1.0%	40.4	7.8x	0.9x
Jute	16,418	16,634	-216.48	-1.30%	3	3,847	0.1%	54.7	0.3%	NM	NM	POWERGRID	40,116	0.9%	20.3	NM	0.3x
Ceramics	552	557	-5.19	-0.93%	5	24,519	0.3%	211.3	1.1%	65.4x	1.5x	EBL	39,386	0.9%	127.3	5.7x	0.9x
Miscellaneous	4,329	4,299	+30.47	+0.71%	15	235,883	3.3%	463.9	2.3%	39.8x	1.8x	CITYBANK	34,081	0.8%	543.6	5.2x	0.9x
Corporate Bond**	6,974	6,975	-1.16	-0.02%	16	39,297	0.6%	1.0	0.0%	NM	NM	BESTHLDNG	32,518	0.8%	129.2	23.6x	0.5x
Treasury Bond**	312	310	+2.15	+0.69%	236	2,866,200	40.2%	2.8	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
GBBPOWER	11.0	+10.0%	2.9	NM	0.5x	SQURPHARMA	117,112	8.6%	10.2x	1.7x	GP	345.6	+8.7%	1,386.8	13.2x	6.5x
ACI	176.0	+10.0%	148.8	NM	1.8x	BEXIMCO	69,460	5.1%	NM	1.2x	BATBC	426.5	+4.3%	629.0	13.2x	4.4x
ABBANK	9.9	+10.0%	145.4	13.6x	0.3x	BATBC	45,948	3.4%	13.2x	4.4x	BRACBANK	49.6	+5.8%	608.1	9.0x	1.2x
GRAMEENS2	16.5	+10.0%	41.6	NM	1.1x	RENATA	35,002	2.6%	38.1x	2.7x	ROBI	33.4	+9.5%	548.9	37.5x	2.7x
ISLAMICFIN	12.1	+10.0%	6.2	NM	1.1x	ISLAMIBANK	33,649	2.5%	10.7x	0.9x	CITYBANK	25.3	+4.1%	543.6	5.2x	0.9x
POPULAR1MF	4.4	+10.0%	17.8	NM	0.5x	BXPHARMA	32,479	2.4%	7.8x	0.9x	SQURPHARMA	233.0	-1.4%	476.0	10.2x	1.7x
ABB1STMF	4.4	+10.0%	33.3	NM	0x	BRACBANK	32,157	2.4%	9.0x	1.2x	MTB	15.3	+9.3%	421.8	5.1x	0.6x
DBH1STMF	5.5	+10.0%	2.4	NM	0.6x	GP	30,004	2.2%	13.2x	6.5x	IFIC	10.2	+9.7%	397.0	7.7x	0.5x
ISLAMIBANK	43.2	+9.9%	283.5	10.7x	0.9x	LHBL	24,690	1.8%	16.2x	4.0x	DHAKABANK	14.0	+9.4%	348.4	7.3x	0.6x
DACCADYE	12.2	+9.9%	3.5	NM	0.4x	EBL	24,199	1.8%	5.7x	0.9x	GIB	8.0	+8.1%	293.4	5.4x	0.6x
						PUBALIBANK	20,448	1.5%	3.8x	0.6x						
						NBL	16,930	1.2%	NM	2.1x						
						CITYBANK	16,830	1.2%	5.2x	0.9x						
						BSRMLTD	14,210	1.0%	5.0x	0.7x						
						ALARABANK	13,534	1.0%	11.4x	1.2x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	18.5x	3.0x						
						UTTARABANK	11,350	0.8%	13.8x	0.9x						
						ORIONPHARM	11,317	0.8%	14.5x	0.7x						
						ROBI	10,738	0.8%	37.5x	2.7x						
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)
ICB3RDNRB	5.4	-5.3%	12.4	NM	1.0x	JHRML	74.2	74.2	1.0	1,000	74.20					
ICBSONALI1	8.7	-4.4%	33.4	NM	1x	PRAGATILIF	148.0	139.7	12.0	285	41.05					
ICBAMCL2ND	7.5	-3.8%	0.8	NM	1.2x	GP	345.6	315.0	10.0	112	36.60					
CRYSTALINS	81.0	-3.0%	4.5	28.1x	3.4x	AIL	115.5	102.9	7.0	300	34.57					
LIBRAINFU	839.2	-3.0%	19.5	NM	1.0x	ACI	160.0	160.0	1.0	141	22.56					
HAMI	136.3	-3.0%	0.9	NM	15.0x	NRBCBANK	11.5	11.3	11.0	1,525	17.29					
ANWARGALV	139.6	-3.0%	65.8	NM	8.4x	TOSRIFA	27.4	27.4	7.0	500	13.70					
NAVANAPHAR	81.3	-3.0%	60.8	20.8x	1.9x	ORIONINFU	529.2	474.3	3.0	19	9.62					
KAY&QUE	250.5	-3.0%	10.8	97.9x	2.7x	SIMTEX	24.9	23.8	3.0	330	8.11					
ASIATICLAB	45.6	-3.0%	81.1	NM	0.9x	AGNISYSL	31.5	31.2	3.0	230	7.21					

* 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
JHRML	74.2	74.2	74.2	1,000	1
PRAGATILIF	148.0	139.7	41.0	285	12
GP	345.6	315.0	36.6	112	10
AIL	115.5	102.9	34.6	300	7
ACI	160.0	160.0	22.6	141	1
NRBCBANK	11.5	11.3	17.3	1,525	11
TOSRIFA	27.4	27.4	13.7	500	7
ORIONINFU	529.2	474.3	9.6	19	3
SIMTEX	24.9	23.8	8.1	330	3
AGNISYSL	31.5	31.2	7.2	230	3
PREMIERCEM	70.0	68.4	5.5	79	2
CITYGENINS	88.0	88.0	5.3	60	3
ASIATICLAB	46.5	45.6	5.0	109	2
SQURPHARMA	229.4	229.4	4.9	22	1
SPCL	61.0	59.0	4.0	67	6
POPULARLIF	60.0	57.0	3.4	58	2
BEXIMCO	126.1	104.1	2.6	24	3
BEXIMCO	126.1	104.1	2.6	24	3
GEMINISEA	270.5	270.5	2.6	9	1
SONALIANSH	284.9	284.9	2.4	8	1
LIBRAINFU	900.0	900.0	2.2	2	1
MONNOCERA	101.0	101.0	2.0	20	1
Total			325.3		103

Important DSE News

CITYBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.17 for April-June 2024 as against Tk. 1.10 for April-June 2023; Consolidated EPS was Tk. 1.85 for January-June 2024 as against Tk. 1.76 for January-June 2023. Consolidated NOCFPS was Tk. 2.88 for January-June 2024 as against Tk. 1.10 for January-June 2023. Consolidated NAV per share was Tk. 28.12 as on June 30, 2024 and Tk. 28.56 as on December 31, 2023. Previous year figures were adjusted for bonus share declared and issued based on 2023 performance.

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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