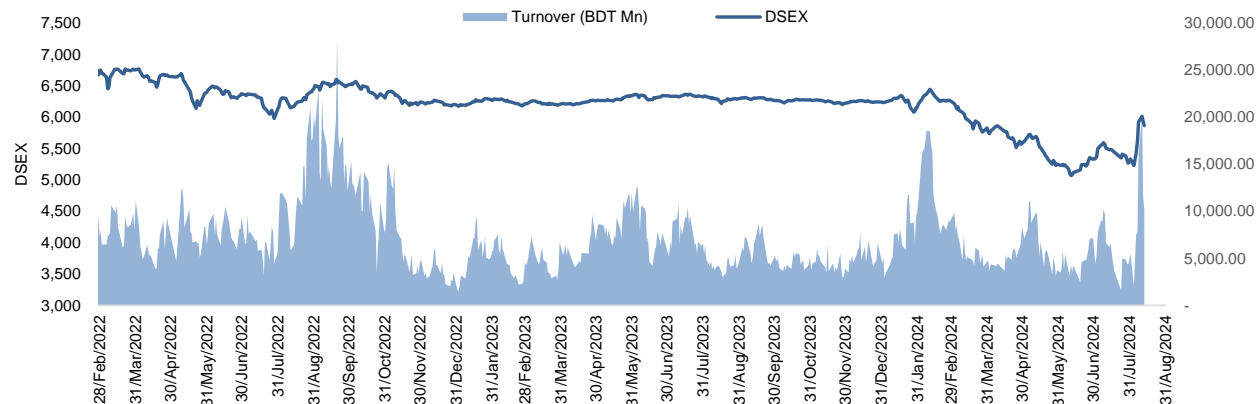


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.08%) lost 64.32 points and closed at 5,867.96. The blue-chip index DS30 (-0.91%), the Shariah-based index DSES (-1.22%), and the large-cap index CDSET (-1.39%) closed at 2,134.04, 1,255.36, and 1,145.28 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 2.81% followed by NBF (I) (-2.26%), Food & Allied (-1.89%), Fuel & Power (-1.34%), Bank (-1.24%), Pharmaceutical (-0.93%), and Telecommunication (-0.86%), respectively. Block trades contributed 4.7% of the overall market turnover. BRAC Bank Ltd. (+3.3%) was the most traded share with a turnover of BDT 539 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,867.96	5,932.28	-64.32	-1.08%	-6.1%
DS30	2,134.04	2,153.54	-19.50	-0.91%	+1.9%
DSES	1,255.36	1,270.81	-15.45	-1.22%	-8.0%
CDSET	1,145.28	1,161.41	-16.13	-1.39%	-4.8%

	Advanced	Declined	Unchanged	Total
All Category	107	269	23	399
A Category (Equity)	57	169	14	240
B Category (Equity)	37	61	3	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	13	35	6	54
Mutual Funds	1	31	5	37
Corporate Bonds	1	3	0	4
Treasury Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,046,074	7,097,697	-0.7%
	Mn USD	59,712	60,150	
Turnover	Mn BDT	10,150	11,430	-11.2%
	Mn USD	86	97	
Volume	Mn Shares	400	444	-9.8%
No. of Trade		215,751	228,405	-5.5%

* Average Interbank Exchange Rate is BDT 118.00 as of Aug 13, 2024

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Figure: Sectorial Turnover (BDT Mn)

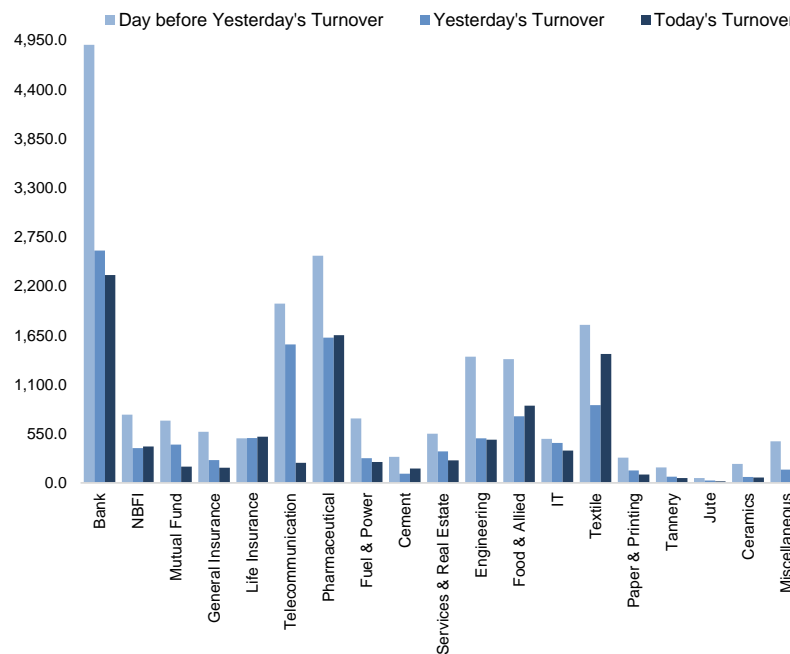
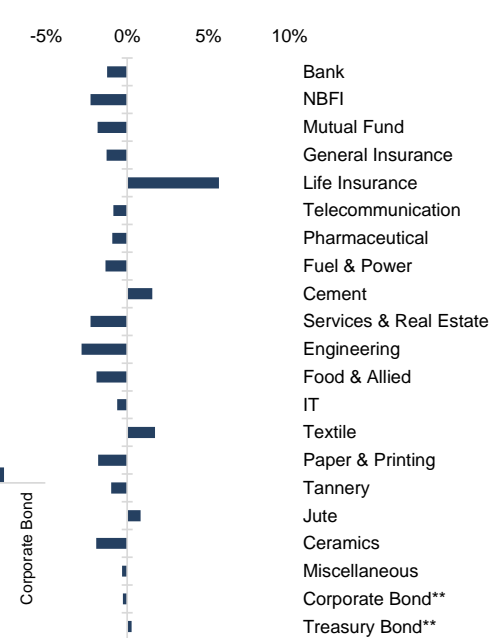


Figure: Sectorial Mcap Change



Market PE 16.3x
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	1,582	1,602	-19.87	-1.24%	36	757,810	10.8%	2,323.9	24.0%	8.2x	0.8x	GP	480,032	11.5%	0.0	13.6x	6.7x
NBFI	1,409	1,441	-32.58	-2.26%	23	136,375	1.9%	406.6	4.2%	NM	NM	BATBC	221,994	5.3%	167.2	12.7x	4.2x
Mutual Fund	756	770	-14.10	-1.83%	37	35,316	0.5%	181.0	1.9%	NM	0.7x	SQRUPHARMA	201,402	4.8%	324.8	9.9x	1.7x
General Insurance	3,263	3,305	-41.83	-1.27%	43	94,518	1.3%	170.8	1.8%	17.0x	1.4x	WALTONHIL	194,753	4.7%	25.2	15.0x	1.8x
Life Insurance	2,324	2,199	+124.66	+5.67%	15	61,780	0.9%	517.5	5.4%	NM	NM	ROBI	175,471	4.2%	202.4	37.6x	2.8x
Telecommunication	5,852	5,902	-50.65	-0.86%	3	677,550	9.6%	225.4	2.3%	16.2x	4.5x	BEXIMCO	103,842	2.5%	0.8	NM	1.2x
Pharmaceutical	3,275	3,306	-30.61	-0.93%	34	621,373	8.8%	1,651.1	17.1%	16.6x	1.8x	BRACBANK	88,132	2.1%	538.8	9.0x	1.2x
Fuel & Power	1,311	1,329	-17.76	-1.34%	23	345,232	4.9%	232.5	2.4%	22.6x	0.7x	RENATA	87,146	2.1%	301.5	38.0x	2.7x
Cement	2,495	2,457	+37.95	+1.54%	7	119,159	1.7%	161.3	1.7%	20.1x	2.6x	BERGERPBL	85,465	2.1%	4.1	26.4x	6.0x
Services & Real Estate	1,429	1,462	-33.03	-2.26%	9	79,016	1.1%	252.1	2.6%	24.8x	0.6x	UPGDCL	85,157	2.0%	9.0	11.4x	2.5x
Engineering	3,186	3,278	-92.11	-2.81%	42	368,121	5.2%	481.5	5.0%	15.5x	1.1x	MARICO	73,464	1.8%	12.2	14.7x	7.4x
Food & Allied	19,160	19,529	-369.38	-1.89%	21	351,767	5.0%	862.4	8.9%	18.7x	5.9x	ISLAMIBANK	67,781	1.6%	102.1	10.4x	0.9x
IT	2,643	2,660	-16.58	-0.62%	11	34,775	0.5%	359.8	3.7%	28.7x	2.3x	UNILEVERCL	60,726	1.5%	304.9	68.4x	27.7x
Textile	1,363	1,340	+23.04	+1.72%	58	141,465	2.0%	1,442.3	14.9%	NM	1.0x	ICB	58,627	1.4%	4.6	NM	1.4x
Paper & Printing	6,650	6,771	-121.61	-1.80%	6	30,507	0.4%	92.7	1.0%	42.9x	1.3x	DUTCHBANGL	48,335	1.2%	22.2	6.3x	1.0x
Tannery	2,406	2,430	-24.08	-0.99%	6	26,352	0.4%	52.8	0.5%	45.4x	2.5x	BXPHARMA	39,213	0.9%	3.2	7.4x	0.8x
Jute	16,184	16,052	+131.81	+0.82%	3	3,792	0.1%	18.6	0.2%	NM	NM	POWERGRID	38,745	0.9%	3.3	NM	0.2x
Ceramics	526	536	-10.26	-1.91%	5	23,357	0.3%	60.8	0.6%	62.3x	1.4x	EBL	37,349	0.9%	33.0	5.4x	0.9x
Miscellaneous	4,276	4,289	-13.46	-0.31%	15	232,967	3.3%	172.0	1.8%	39.3x	1.8x	CITYBANK	32,195	0.8%	182.6	4.9x	0.8x
Corporate Bond**	6,934	6,952	-18.16	-0.26%	16	38,441	0.5%	0.7	0.0%	NM	NM	BESTHLDNG	30,718	0.7%	41.7	22.3x	0.5x
Treasury Bond**	317	316	+0.86	+0.27%	236	2,865,954	40.7%	3.2	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
NATLIFEINS	118.8	+10.0%	21.7	NM	NM	SQRUPHARMA	117,112	8.6%	9.9x	1.7x	BRACBANK	49.8	+3.3%	538.8	9.0x	1.2x
ISLAMICFIN	14.6	+9.8%	66.6	NM	1.4x	BEXIMCO	69,460	5.1%	NM	1.2x	SQRUPHARMA	227.2	-1.2%	324.8	9.9x	1.7x
MHSML	20.4	+9.7%	19.1	NM	1.0x	BATBC	45,948	3.4%	12.7x	4.2x	UNILEVERCL	3,150.6	-3.0%	304.9	68.4x	27.7x
SAIHAMCOT	17.4	+9.4%	138.7	18.3x	0.5x	RENATA	35,002	2.6%	38.0x	2.7x	RENATA	759.8	+1.4%	301.5	38.0x	2.7x
SAIHAMTEX	19.4	+9.0%	77.6	26.6x	0.5x	ISLAMIBANK	33,649	2.5%	10.4x	0.9x	IFIC	10.8	+0.9%	272.9	8.1x	0.6x
FAREASTLIF	41.6	+8.9%	17.5	NM	NM	BXPHARMA	32,479	2.4%	7.4x	0.8x	ABBANK	11.5	+6.5%	252.4	15.8x	0.4x
HEIDELBCEM	314.4	+8.8%	72.2	44.1x	4x	BRACBANK	32,157	2.4%	9.0x	1.2x	TECHNODRUG	55.8	-2.8%	207.0	NM	1.9x
PRAGATILIF	187.0	+8.6%	135.9	NM	NM	GP	30,004	2.2%	13.6x	6.7x	ROBI	33.5	-2.9%	202.4	37.6x	2.8x
SKTRIMS	23.0	+7.5%	37.7	17.4x	1.4x	LHBL	24,690	1.8%	15.9x	3.9x	CITYBANK	23.9	-2.8%	182.6	4.9x	0.8x
DACCADYE	14.4	+7.5%	92.3	NM	0.4x	EBL	24,199	1.8%	5.4x	0.9x	AGNISYSL	33.1	+2.2%	178.8	30.9x	2.0x
						PUBALIBANK	20,448	1.5%	3.6x	0.6x						
						NBL	16,930	1.2%	NM	2.0x						
						CITYBANK	16,830	1.2%	4.9x	0.8x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.9x	1.2x						
						PRIMEBANK	12,985	1.0%	4.4x	0.7x						
						OLYMPIC	12,616	0.9%	17.4x	2.8x						
						UTTARABANK	11,350	0.8%	13.1x	0.8x						
						ORIONPHARM	11,317	0.8%	13.7x	0.6x						
						ROBI	10,738	0.8%	37.6x	2.8x						
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)
ISLAMIBANK	42.1	-5.6%	102.1	10.4x	0.9x						SUNLIFEINS	63.0	58.0	3.0	1,264	76.96
BSRMLTD	90.9	-5.5%	27.5	4.6x	1x						CITYBANK	25.9	23.9	6.0	2,949	72.88
JAMUNABANK	19.4	-3.0%	27.0	5.7x	0.7x						PRAGATILIF	180.0	167.1	17.0	398	67.27
UNILEVERCL	3,150.6	-3.0%	304.9	68.4x	27.7x						SQRUPHARMA	228.0	228.0	1.0	220	50.16
ACI	175.1	-3.0%	13.1	NM	1.7x						ICBIBANK	3.9	3.9	1.0	10,220	39.86
APEXTANRY	90.8	-3.0%	2.0	NM	1.8x						AGNISYSL	32.5	32.0	2.0	1,030	33.46
SINGERBD	139.5	-3.0%	5.6	79.3x	4.2x						MIDLANDBNK	22.4	22.4	1.0	800	17.92
WALTONHIL	642.9	-3.0%	25.2	15.0x	1.8x						1STPRIMFMF	46.0	42.5	13.0	305	13.42
SONALIPAPR	246.8	-3.0%	48.0	75.0x	1.4x						BXPHARMA	87.9	87.9	5.0	122	10.69
BEACHHATCH	74.7	-3.0%	113.5	38.7x	6.0x						IDLC	39.7	39.7	1.0	239	9.47

* 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
SUNLIFEINS	63.0	58.0	77.0	1,264	3
CITYBANK	25.9	23.9	72.9	2,949	6
PRAGATILIF	180.0	167.1	67.3	398	17
SQURPHARMA	228.0	228.0	50.2	220	1
ICBIBANK	3.9	3.9	39.9	10,220	1
AGNISYSL	32.5	32.0	33.5	1,030	2
MIDLANDBNK	22.4	22.4	17.9	800	1
1STPRIMFMF	46.0	42.5	13.4	305	13
BXPBARMA	87.9	87.9	10.7	122	5
IDLC	39.7	39.7	9.5	239	1
BATBC	431.0	431.0	8.6	20	1
MEGHNACEM	80.0	79.8	7.8	98	6
ORIONINFU	498.0	495.0	7.2	15	2
ICB	67.6	67.6	6.5	97	1
RUPALILIFE	146.0	142.7	6.5	45	3
LOVELLO	92.8	92.0	6.1	66	3
TOSRIFA	28.2	27.4	4.3	156	4
TOSRIFA	28.2	27.4	4.3	156	4
RENATA	770.0	770.0	3.9	5	1
DOMINAGE	13.9	13.9	3.5	250	1
LHBL	71.0	63.0	3.1	47	3
POPULARLIF	60.3	59.8	2.4	41	2
Total			481.1		108

Important DSE News

LANKABAFIN

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2023. Date of AGM: 29.09.2024, Time: 11:00 AM, Venue: Digital Platform. Record Date: 04.09.2024. The Company has also reported Consolidated EPS of Tk. 0.70, Consolidated NAV per share of Tk. 18.82 and Consolidated NOCFPS of Tk. 1.21 for the year ended December 31, 2023 as against Tk. 1.21, Tk. 20.02 and Tk. (12.59) respectively for the year ended December 31, 2022.

(Q1 Un-audited): Consolidated EPS was Tk. 0.15 for January-March 2024 as against Tk. 0.15 for January-March 2023. Consolidated NOCFPS was Tk. 1.35 for January-March 2024 as against Tk. (0.22) for January-March 2023. Consolidated NAV per share was Tk. 18.97 as on March 31, 2024 and Tk. 18.82 as on December 31, 2023. NOCFPS has been increased mainly due to relatively increased deposits from customers and increased received from investments income than the previous period.

(Q2 Un-audited): Consolidated EPS was Tk. 0.05 for April-June 2024 as against Tk. 0.17 for April-June 2023; Consolidated EPS was Tk. 0.20 for January-June 2024 as against Tk. 0.32 for January-June 2023. Consolidated NOCFPS was Tk. 0.14 for January-June 2024 as against Tk. 1.42 for January-June 2023. Consolidated NAV per share was Tk. 19.02 as on June 30, 2024 and Tk. 18.82 as on December 31, 2023.

DELTALIFE

The company has informed that Mr. Uttam Kumar Sadhu FCMA, FCS has been appointed as the Chief Executive Officer (CEO) of the Company with effect from July 31, 2024.

RAKCERAMIC

The company has informed that Mr. Sadhan Kumar Dey has been appointed as the Chief Executive Officer of the Company with effect from 30th July 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
FAREASTFIN		0.0%	0%	Record Date	3-Sep-24
LANKABAFIN		0.0%	10%	Record Date	4-Sep-24

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