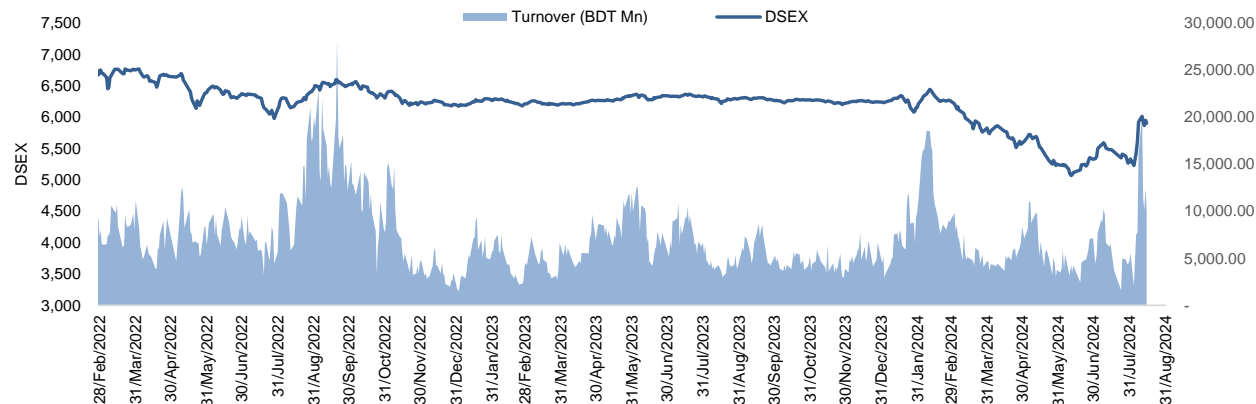


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.82%) lost 48.94 points and closed at 5,903.84. The blue-chip index DS30 (-0.81%), the Shariah-based index DSES (-0.44%), and the large-cap index CDSET (-0.81%) closed at 2,179.35, 1,264.72, and 1,162.54 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 2.00% followed by Telecommunication (-1.17%), NBF1 (-0.51%), Food & Allied (-0.22%), Fuel & Power (-0.15%), Pharmaceutical (+0.21%), and Engineering (+0.40%), respectively. Block trades contributed 3.3% of the overall market turnover. Grameenphone Ltd. (-0.6%) was the most traded share with a turnover of BDT 855 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,903.84	5,952.77	-48.94	-0.82%	-5.5%
DS30	2,179.35	2,197.04	-17.70	-0.81%	+4.1%
DSES	1,264.72	1,270.34	-5.62	-0.44%	-7.3%
CDSET	1,162.54	1,172.00	-9.46	-0.81%	-3.3%

	Advanced	Declined	Unchanged	Total
All Category	91	275	32	398
A Category (Equity)	62	154	22	238
B Category (Equity)	18	76	7	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	11	41	3	55
Mutual Funds	1	28	8	37
Corporate Bonds	0	3	0	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,089,644	7,118,714	-0.4%
	Mn USD	60,082	60,328	
Turnover	Mn BDT	9,990	12,440	-19.7%
	Mn USD	85	105	
Volume	Mn Shares	274	421	-34.9%
	No. of Trade	192,960	226,342	-14.7%

\* Average Interbank Exchange Rate is BDT 118.00 as of Aug 15, 2024

Figure: Sectorial Turnover (BDT Mn)

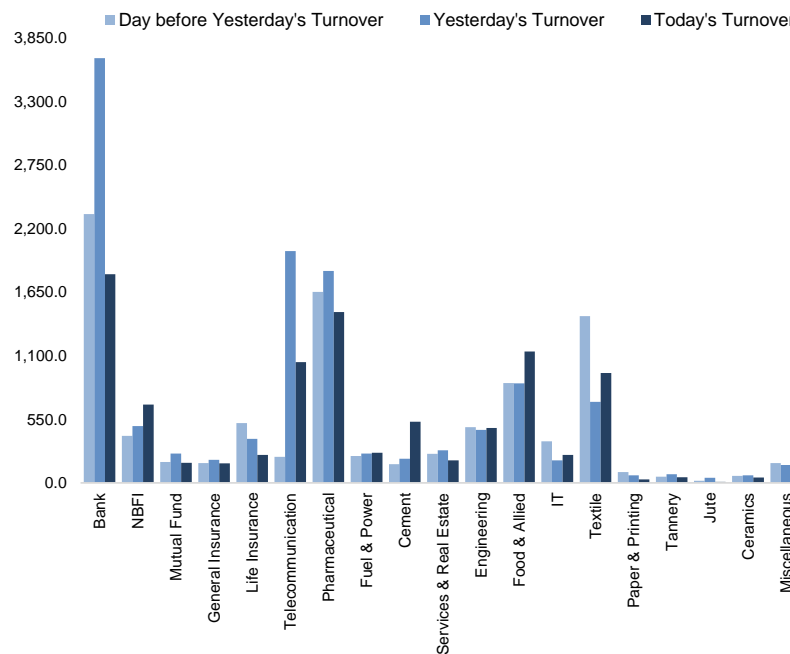
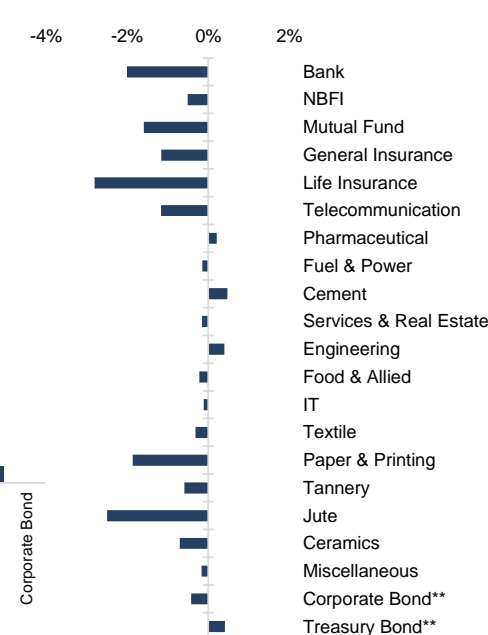


Figure: Sectorial Mcap Change



Market PE 16.5x  
Market PB 1.4x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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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	1,576	1,608	-32.21	-2.00%	36	754,942	10.6%	1,805.4	18.7%	8.2x	0.8x	GP	509,063	12.1%	855.3	14.4x	7.1x
NBFI	1,444	1,451	-7.37	-0.51%	23	139,742	2.0%	676.9	7.0%	NM	NM	BATBC	231,066	5.5%	205.1	13.2x	4.4x
Mutual Fund	737	749	-11.88	-1.59%	37	34,424	0.5%	173.6	1.8%	NM	0.7x	SQURPHARMA	208,227	4.9%	265.1	10.3x	1.7x
General Insurance	3,227	3,265	-37.78	-1.16%	43	93,472	1.3%	169.1	1.8%	16.8x	1.4x	WALTONHIL	196,661	4.7%	18.5	15.2x	1.8x
Life Insurance	2,277	2,342	-65.64	-2.80%	15	60,528	0.9%	242.1	2.5%	NM	NM	ROBI	175,995	4.2%	158.6	37.8x	2.8x
Telecommunication	6,120	6,192	-72.32	-1.17%	3	708,557	10.0%	1,044.7	10.8%	16.9x	4.7x	BEXIMCO	103,842	2.5%	0.0	NM	1.2x
Pharmaceutical	3,321	3,314	+6.97	+0.21%	34	630,189	8.9%	1,478.6	15.3%	16.9x	1.8x	BRACBANK	93,972	2.2%	677.4	9.6x	1.3x
Fuel & Power	1,317	1,318	-1.92	-0.15%	23	346,611	4.9%	261.4	2.7%	22.7x	0.8x	RENATA	90,518	2.1%	141.6	39.4x	2.8x
Cement	2,580	2,568	+12.14	+0.47%	7	123,235	1.7%	528.8	5.5%	20.8x	2.7x	BERGERPBL	86,281	2.0%	27.7	26.7x	5.6x
Services & Real Estate	1,422	1,424	-2.19	-0.15%	9	78,596	1.1%	193.9	2.0%	24.6x	0.6x	UPGDCL	85,389	2.0%	12.3	11.4x	2.5x
Engineering	3,196	3,183	+12.79	+0.40%	42	369,255	5.2%	475.4	4.9%	15.6x	1.2x	MARICO	77,178	1.8%	211.4	15.4x	7.8x
Food & Allied	19,817	19,861	-43.32	-0.22%	21	363,839	5.1%	1,136.6	11.8%	19.3x	6.1x	ISLAMIBANK	64,239	1.5%	43.9	9.9x	0.9x
IT	2,607	2,610	-2.84	-0.11%	11	34,304	0.5%	241.2	2.5%	28.3x	2.2x	UNILEVERCL	60,458	1.4%	395.4	68.1x	27.6x
Textile	1,342	1,346	-4.16	-0.31%	58	139,191	2.0%	950.0	9.8%	NM	0.9x	ICB	56,198	1.3%	6.8	NM	1.3x
Paper & Printing	6,356	6,477	-120.90	-1.87%	6	29,161	0.4%	29.9	0.3%	41.0x	1.3x	DUTCHBANGL	50,181	1.2%	30.5	6.6x	1.0x
Tannery	2,369	2,383	-13.94	-0.59%	6	25,943	0.4%	49.8	0.5%	44.7x	2.4x	BXPHARMA	38,098	0.9%	77.3	7.1x	0.8x
Jute	15,328	15,720	-392.07	-2.49%	3	3,592	0.1%	7.7	0.1%	NM	NM	POWERGRID	38,014	0.9%	2.9	NM	0.2x
Ceramics	516	520	-3.66	-0.70%	5	22,924	0.3%	46.3	0.5%	61.1x	1.4x	EBL	37,892	0.9%	69.6	5.4x	0.9x
Miscellaneous	4,260	4,267	-6.90	-0.16%	15	232,129	3.3%	146.4	1.5%	39.3x	1.8x	OLYMPIC	32,970	0.8%	174.1	19.7x	3.2x
Corporate Bond**	6,874	6,903	-29.15	-0.42%	16	37,482	0.5%	0.3	0.0%	NM	NM	CITYBANK	32,465	0.8%	199.3	4.9x	0.9x
Treasury Bond**	320	318	+1.31	+0.41%	236	2,861,081	40.4%	0.0	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
DBH	45.7	+9.9%	221.6	10.1x	1.0x	SQURPHARMA	117,112	8.6%	10.3x	1.7x	GP	377.0	-0.6%	855.3	14.4x	7.1x
MITHUNKNIT	22.4	+9.8%	24.0	NM	7.0x	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	53.1	-2.4%	677.4	9.6x	1.3x
PHOENIXFIN	10.2	+9.7%	15.0	NM	NM	BATBC	45,948	3.4%	13.2x	4.4x	HEIDELBCEM	359.3	+5.1%	427.5	50.4x	5.0x
OLYMPIC	164.9	+9.0%	174.1	19.7x	3.2x	RENATA	35,002	2.6%	39.4x	2.8x	UNILEVERCL	3,136.7	-2.9%	395.4	68.1x	27.6x
JMISMDL	173.9	+8.6%	41.6	NM	2.0x	ISLAMIBANK	33,649	2.5%	9.9x	0.9x	SQURPHARMA	234.9	+0.2%	265.1	10.3x	1.7x
QUASEMIND	44.1	+8.4%	76.3	45.0x	1.6x	BXPHARMA	32,479	2.4%	7.1x	0.8x	DBH	45.7	+9.9%	221.6	10.1x	1.0x
PRIMETEX	19.1	+7.3%	8.4	NM	0x	BRACBANK	32,157	2.4%	9.6x	1.3x	MARICO	2,450.1	+5.0%	211.4	15.4x	7.8x
SINGERBD	148.1	+6.4%	38.1	84.1x	4.5x	GP	30,004	2.2%	14.4x	7.1x	BATBC	427.9	-0.6%	205.1	13.2x	4.4x
SAIHAMCOT	18.8	+5.6%	178.4	19.8x	0.5x	LHBL	24,690	1.8%	16.2x	4.0x	CITYBANK	24.1	-2.8%	199.3	4.9x	0.9x
SQUARETEXT	54.9	+5.6%	28.1	9.3x	1.1x	EBL	24,199	1.8%	5.4x	0.9x	TECHNODRUG	52.6	-3.0%	184.1	NM	1.8x
						PUBALIBANK	20,448	1.5%	3.7x	0.6x						
						NBL	16,930	1.2%	NM	1.9x						
						CITYBANK	16,830	1.2%	4.9x	0.9x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.4x	1.1x						
						PRIMEBANK	12,985	1.0%	4.4x	0.7x						
						OLYMPIC	12,616	0.9%	19.7x	3.2x						
						UTTARABANK	11,350	0.8%	12.6x	0.8x						
						ORIONPHARM	11,317	0.8%	12.9x	0.6x						
						ROBI	10,738	0.8%	37.8x	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)
DELTALIFE	100.7	-5.0%	24.9	NM	NM						BRACBANK	55.9	54.0	3.0	2,318	125.20
SONALILIFE	68.0	-3.0%	2.1	NM	NM						LOVELLO	85.0	83.2	11.0	551	46.31
ICB	64.8	-3.0%	6.8	NM	1.3x						UNIQUEHRL	58.1	57.8	5.0	525	30.44
ORIONINFU	424.9	-3.0%	13.6	NM	28.5x						MARICO	2,330.0	2,310.4	10.0	13	30.12
LIBRAINFU	768.9	-3.0%	5.7	NM	0.9x						CITYBANK	25.9	25.9	1.0	1,000	25.90
AL-HAJTEX	123.3	-3.0%	5.0	NM	13.6x						AL-HAJTEX	123.3	123.3	1.0	92	11.29
ASIAPACINS	42.2	-3.0%	3.1	19.5x	1.8x						GP	400.0	370.0	4.0	27	10.55
NEWLINE	45.5	-3.0%	0.1	87.5x	1.8x						CRYSTALINS	83.8	83.8	1.0	123	10.31
POPULARLIF	61.8	-3.0%	29.2	NM	NM						QUASEMIND	40.7	40.0	5.0	202	8.20
PARAMOUNT	48.8	-3.0%	4.6	20.1x	1.7x						SIBL	11.5	11.5	1.0	500	5.75

\* 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
BRACBANK	55.9	54.0	125.2	2,318	3
LOVELLO	85.0	83.2	46.3	551	11
UNIQUEHRL	58.1	57.8	30.4	525	5
MARICO	2,330.0	2,310.4	30.1	13	10
CITYBANK	25.9	25.9	25.9	1,000	1
AL-HAJTEX	123.3	123.3	11.3	92	1
GP	400.0	370.0	10.6	27	4
CRYSTALINS	83.8	83.8	10.3	123	1
QUASEMIND	40.7	40.0	8.2	202	5
SIBL	11.5	11.5	5.8	500	1
FINEFOODS	160.0	160.0	4.7	29	2
MTB	14.5	14.5	3.6	250	1
UCB	13.7	13.7	2.7	199	2
ABBANK	11.3	11.3	2.3	200	1
NAVANAPHAR	73.7	73.7	1.5	20	1
TECHNODRUG	59.0	54.7	1.3	23	2
NRBCBANK	12.0	12.0	1.2	100	1
NRBCBANK	12.0	12.0	1.2	100	1
SAIHAMCOT	17.6	17.6	1.1	65	1
AGNISYSL	33.0	33.0	1.0	30	1
BSC	110.0	110.0	0.9	8	1
ORIONPHARM	56.5	56.5	0.8	15	1
<b>Total</b>			<b>331.9</b>		<b>66</b>

**Important DSE News**
**BERGERPBL**

**(Q1 Un-audited):** Consolidated EPS was Tk. 20.74 for April-June 2024 as against Tk. 20.96 for April-June 2023; Consolidated NOCFPS was Tk. (17.81) for April-June 2024 as against Tk. 47.08 for April-June 2023. Consolidated NAV per share was Tk. 330.27 as on June 30, 2024 and Tk. 309.53 as on March 31, 2024. The Company has informed that NOCFPS decreased mainly due to the settlement of LCs that had been deferred last year.

**DELTALIFE**

The Board of Directors has recommended 30% Cash Dividend (Tk. 3.00 per share of Tk. 10/- each) for the year ended December 31, 2023. Date of AGM: 28.09.2024, Time: 11:00 AM, Venue: Virtually by using Digital Platform. Record Date: 05.09.2024.

**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
DELTALIFE		0.0%	30%	Record Date	5-Sep-24

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