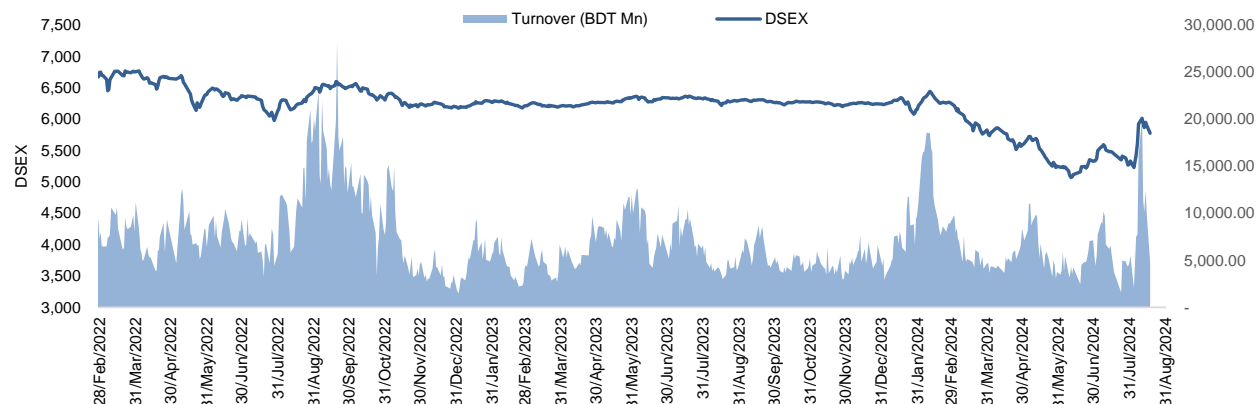


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-2.12%) lost 125.2 points and closed at 5,778.64. The blue-chip index DS30 (-2.42%), the Shariah-based index DSES (-1.94%), and the large-cap index CDSET (-2.13%) closed at 2,126.61, 1,240.19, and 1,137.77 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 2.99% followed by NBF1 (-2.64%), Fuel & Power (-2.38%), Engineering (-2.36%), Bank (-2.31%), Food & Allied (-2.28%), and Pharmaceutical (-2.02%), respectively. Block trades contributed 4.1% of the overall market turnover. Grameenphone Ltd. (-3.0%) was the most traded share with a turnover of BDT 493 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,778.64	5,903.84	-125.20	-2.12%	-7.5%
DS30	2,126.61	2,179.35	-52.74	-2.42%	+1.6%
DSES	1,240.19	1,264.72	-24.54	-1.94%	-9.1%
CDSET	1,137.77	1,162.54	-24.77	-2.13%	-5.4%

	Advanced	Declined	Unchanged	Total
All Category	18	366	14	398
A Category (Equity)	13	215	10	238
B Category (Equity)	5	95	1	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	0	52	3	55
Mutual Funds	1	31	5	37
Corporate Bonds	1	1	0	2
Treasury Bonds	1	1	0	2

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,010,783	7,089,644	-1.1%
	Mn USD	59,413	60,082	
Turnover	Mn BDT	4,809	9,990	-51.9%
	Mn USD	41	85	
Volume	Mn Shares	134	274	-51.3%
No. of Trade		114,569	192,960	-40.6%

\* Average Interbank Exchange Rate is BDT 118.00 as of Aug 18, 2024

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Figure: Sectorial Turnover (BDT Mn)

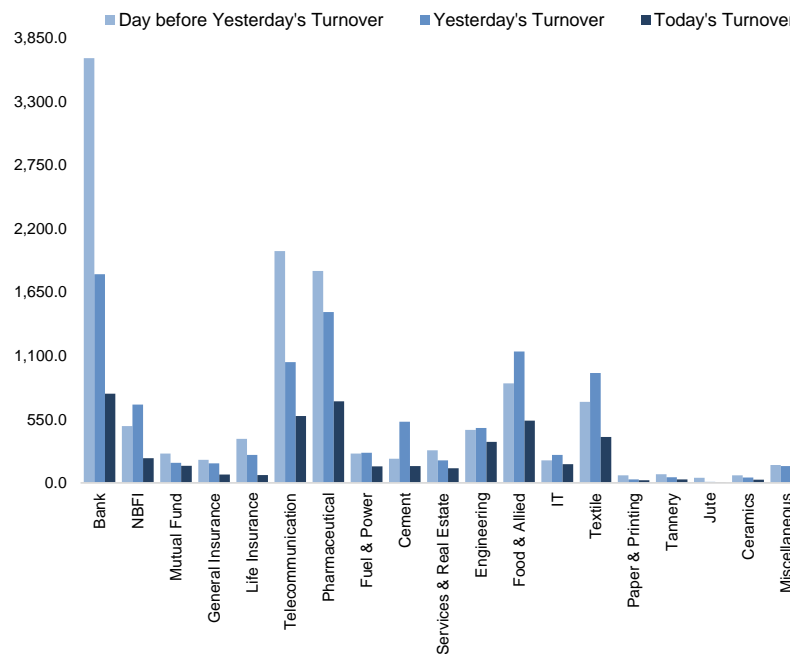
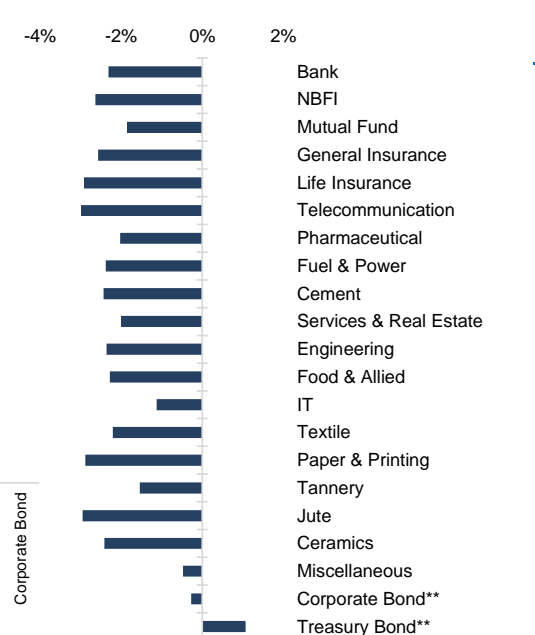


Figure: Sectorial Mcap Change



Market PE 16.1x  
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	1,540	1,576	-36.42	-2.31%	36	737,498	10.5%	770.3	16.7%	8.0x	0.7x	GP	493,805	12.0%	492.6	14.0x	6.9x
NBFI	1,406	1,444	-38.05	-2.64%	23	136,059	1.9%	213.4	4.6%	NM	NM	BATBC	224,154	5.4%	209.8	12.8x	4.3x
Mutual Fund	723	737	-13.67	-1.86%	37	33,786	0.5%	147.4	3.2%	NM	0.7x	SQURPHARMA	202,643	4.9%	184.6	10.0x	1.7x
General Insurance	3,144	3,227	-82.97	-2.57%	43	91,068	1.3%	72.1	1.6%	16.4x	1.4x	WALTONHIL	190,905	4.6%	13.8	14.7x	1.8x
Life Insurance	2,210	2,277	-66.49	-2.92%	15	58,760	0.8%	66.6	1.4%	NM	NM	ROBI	170,757	4.1%	73.4	36.6x	2.7x
Telecommunication	5,937	6,120	-183.00	-2.99%	3	687,368	9.8%	577.4	12.5%	16.4x	4.6x	BEXIMCO	103,842	2.5%	0.1	NM	1.2x
Pharmaceutical	3,254	3,321	-67.20	-2.02%	34	617,440	8.8%	705.2	15.3%	16.5x	1.8x	BRACBANK	91,317	2.2%	216.6	9.4x	1.3x
Fuel & Power	1,285	1,317	-31.32	-2.38%	23	338,366	4.8%	143.9	3.1%	22.2x	0.7x	RENATA	88,683	2.2%	54.0	38.6x	2.7x
Cement	2,518	2,580	-62.81	-2.43%	7	120,235	1.7%	144.8	3.1%	20.3x	2.6x	BERGERPBL	86,281	2.1%	0.0	26.7x	5.6x
Services & Real Estate	1,393	1,422	-28.47	-2.00%	9	77,022	1.1%	125.8	2.7%	24.1x	0.6x	UPGDCL	82,838	2.0%	9.6	11.1x	2.4x
Engineering	3,121	3,196	-75.44	-2.36%	42	360,539	5.1%	354.7	7.7%	15.2x	1.1x	LHBL	75,141	1.8%	39.4	15.8x	3.9x
Food & Allied	19,366	19,817	-451.71	-2.28%	21	355,546	5.1%	538.0	11.7%	18.9x	6.0x	ISLAMIBANK	65,849	1.6%	73.8	10.1x	0.9x
IT	2,578	2,607	-29.29	-1.12%	11	33,918	0.5%	161.2	3.5%	28.0x	2.2x	UNILEVERCL	58,644	1.4%	1.8	66.1x	26.8x
Textile	1,312	1,342	-29.56	-2.20%	58	136,124	1.9%	397.0	8.6%	NM	0.9x	ICB	54,551	1.3%	2.5	NM	1.3x
Paper & Printing	6,173	6,356	-183.15	-2.88%	6	28,321	0.4%	22.1	0.5%	39.8x	1.2x	DUTCHBANGL	48,687	1.2%	46.7	6.4x	1.0x
Tannery	2,332	2,369	-36.54	-1.54%	6	25,543	0.4%	30.9	0.7%	44.0x	2.4x	POWERGRID	37,009	0.9%	3.6	NM	0.2x
Jute	14,876	15,328	-452.15	-2.95%	3	3,486	0.0%	5.2	0.1%	NM	NM	BXPHARMA	36,983	0.9%	16.5	6.9x	0.8x
Ceramics	504	516	-12.46	-2.41%	5	22,371	0.3%	28.2	0.6%	59.6x	1.4x	EBL	36,806	0.9%	39.1	5.3x	0.9x
Miscellaneous	4,240	4,260	-20.08	-0.47%	15	231,035	3.3%	101.3	2.2%	39.1x	1.8x	OLYMPIC	34,090	0.8%	157.9	20.4x	3.3x
Corporate Bond**	6,855	6,874	-18.88	-0.27%	16	37,064	0.5%	0.2	0.0%	NM	NM	CITYBANK	31,522	0.8%	60.3	4.8x	0.8x
Treasury Bond**	323	320	+3.42	+1.07%	235	2,878,762	41.1%	5.2	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
DAFODILCOM	83.9	+6.6%	16.2	NM	6.2x	SQURPHARMA	117,112	8.6%	10.0x	1.7x	GP	365.7	-3.0%	492.6	14.0x	6.9x
1STPRIMFMF	44.6	+5.2%	60.2	NM	4.2x	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	51.6	-2.8%	216.6	9.4x	1.3x
OIMEX	25.2	+4.1%	53.9	70.4x	8.1x	BATBC	45,948	3.4%	12.8x	4.3x	BATBC	415.1	-3.0%	209.8	12.8x	4.3x
SAIFPOWER	21.6	+3.8%	63.3	33.8x	1.4x	RENATA	35,002	2.6%	38.6x	2.7x	SQURPHARMA	228.6	-2.7%	184.6	10.0x	1.7x
OLYMPIC	170.5	+3.4%	157.9	20.4x	3.3x	ISLAMIBANK	33,649	2.5%	10.1x	0.9x	OLYMPIC	170.5	+3.4%	157.9	20.4x	3.3x
MIRACLEIND	33.8	+3.4%	23.6	NM	2.2x	BXPHARMA	32,479	2.4%	6.9x	0.8x	DBH	45.3	-0.9%	115.4	10.0x	1.0x
BEACHHATCH	73.8	+3.4%	26.5	38.2x	6x	BRACBANK	32,157	2.4%	9.4x	1.3x	UCB	13.3	-2.9%	95.8	4.9x	0.5x
ISLAMIBANK	40.9	+2.5%	73.8	10.1x	0.9x	GP	30,004	2.2%	14.0x	6.9x	TECHNODRUG	51.5	-2.1%	84.7	NM	1.8x
KOHINOOR	560.8	+2.1%	14.5	49.5x	9.7x	LHBL	24,690	1.8%	15.8x	3.9x	HEIDELBCEM	348.6	-3.0%	81.9	48.9x	4.8x
PREMIERCEM	65.0	+1.6%	13.0	NM	1.0x	EBL	24,199	1.8%	5.3x	0.9x	MARICO	2,461.3	+0.5%	79.4	15.5x	7.8x
						PUBALIBANK	20,448	1.5%	3.6x	0.6x						
						NBL	16,930	1.2%	NM	1.8x						
						CITYBANK	16,830	1.2%	4.8x	0.8x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.1x	1.1x						
						PRIMEBANK	12,985	1.0%	4.3x	0.7x						
						OLYMPIC	12,616	0.9%	20.4x	3.3x						
						UTTARABANK	11,350	0.8%	12.3x	0.8x						
						ORIONPHARM	11,317	0.8%	12.5x	0.6x						
						ROBI	10,738	0.8%	36.6x	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)
MPETROLEUM	210.2	-3.7%	24.0	4.9x	1.0x						MTB	13.8	13.8	1.0	5,000	69.00
ALIF	9.7	-3.0%	6.9	28.5x	1x						UCB	13.8	13.3	3.0	2,372	31.58
LEGACYFOOT	58.2	-3.0%	4.8	NM	5.3x						SQURPHARMA	230.1	229.9	3.0	50	11.50
UNILEVERCL	3,042.6	-3.0%	1.8	66.1x	26.8x						PARAMOUNT	53.6	47.4	3.0	145	6.94
RUPALILIFE	148.8	-3.0%	2.4	NM	NM						AIL	103.0	95.3	3.0	65	6.23
BPML	55.0	-3.0%	5.3	25.3x	0.7x						GP	370.0	365.7	4.0	15	5.33
GP	365.7	-3.0%	492.6	14.0x	6.9x						RENATA	789.0	789.0	1.0	7	5.13
NLTUBES	71.2	-3.0%	3.2	NM	0.5x						CENTRALINS	49.2	49.2	1.0	100	4.92
JHRML	71.2	-3.0%	13.1	27.9x	2.1x						SANDHANINS	25.0	25.0	1.0	181	4.53
IPDC	25.9	-3.0%	17.8	28.8x	1.5x						LINDEBD	1,095.0	1,095.0	1.0	4	4.38

\* 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
MTB	13.8	13.8	69.0	5,000	1
UCB	13.8	13.3	31.6	2,372	3
SQURPHARMA	230.1	229.9	11.5	50	3
PARAMOUNT	53.6	47.4	6.9	145	3
AIL	103.0	95.3	6.2	65	3
GP	370.0	365.7	5.3	15	4
RENATA	789.0	789.0	5.1	7	1
CENTRALINS	49.2	49.2	4.9	100	1
SANDHANINS	25.0	25.0	4.5	181	1
LINDEBD	1,095.0	1,095.0	4.4	4	1
BEXIMCO	126.5	104.1	4.3	39	7
TAKAFULINS	37.0	37.0	3.7	100	1
DAFODILCOM	79.0	78.4	3.7	47	2
SPCERAMICS	27.3	24.2	3.5	134	3
DOMINAGE	14.0	14.0	3.5	250	1
BRACBANK	53.0	53.0	2.7	50	2
PRAGATILIF	189.0	188.2	2.6	14	2
PRAGATILIF	189.0	188.2	2.6	14	2
SKTRIMS	23.9	23.9	2.4	100	1
DESCO	27.1	27.1	2.0	72	1
ORIONINFU	462.0	462.0	1.5	3	1
PREMIERCEM	64.6	64.6	1.5	23	1
<b>Total</b>			<b>197.9</b>		<b>65</b>

**Important DSE News**
**SBACBANK**

Thermax Textile Mills Ltd., one of the placement holders and ex-directors of SBAC Bank PLC., has expressed its intention to sell 34,821,563 shares out of its total holding of 35,169,778 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange PLC.

Mr. Mohammad Nawaz, one of the placement holders and ex-directors of SBAC Bank PLC., has expressed his intention to transfer 7,065,000 shares of the company to his wife Mrs. Sufia Begum, by way of gift outside the trading system of the Exchange within next 30 working days.

**MIDLANDBNK**

The company has informed that Midland Bank Asset Management Limited, a fully owned subsidiary company of Midland Bank PLC. has obtained registration certificate from Bangladesh Securities and Exchange Commission (BSEC) to conduct its operation as an Asset Manager.

**PADMAOIL**

The company has informed that Engr. Md. Abdus Sobhan has been appointed as the Managing Director of the company with effect from August 15, 2024.

**JAMUNAOIL**

The company has informed that Mr. Mustafa Quadrat-I-Elahi has been appointed as the Managing Director of Jamuna Oil Company Limited with effect from 15 August, 2024 in place of Mr. Gias Uddin Ansary.

**HAMI**

The company has informed that Mr. Md. Osman Goni has been appointed as Company Secretary (Acting) of the company with effect from August 18, 2024.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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