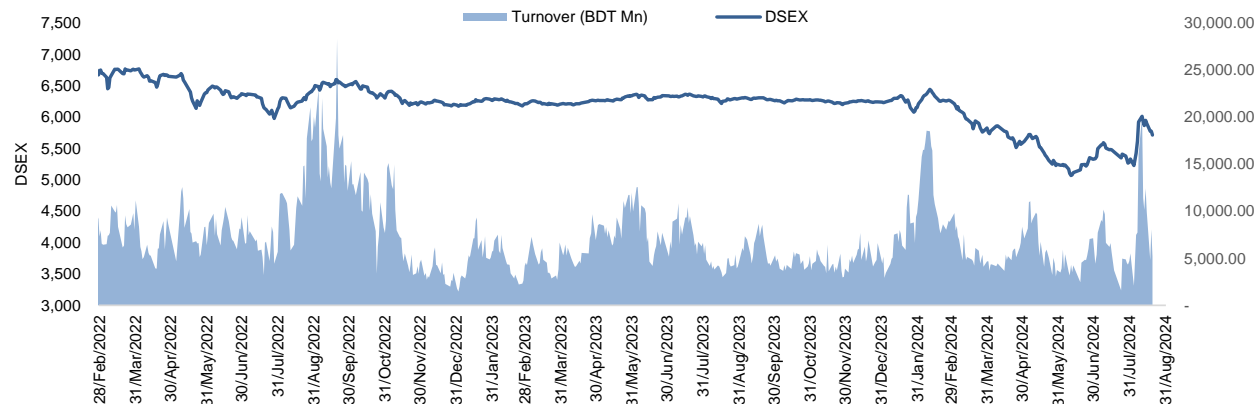


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.04%) lost 60.14 points and closed at 5,715.36. The blue-chip index DS30 (-1.31%), the Shariah-based index DSES (-1.32%), and the large-cap index CDSET (-1.08%) closed at 2,093.27, 1,229.70, and 1,126.18 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 2.91% followed by Food & Allied (-1.85%), NBF1 (-1.84%), Pharmaceutical (-1.05%), Bank (-0.80%), Engineering (-0.72%), and Fuel & Power (+0.13%), respectively. Block trades contributed 3.8% of the overall market turnover. Grameenphone Ltd. (-3.0%) was the most traded share with a turnover of BDT 534 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,715.36	5,775.49	-60.14	-1.04%	-8.5%
DS30	2,093.27	2,121.14	-27.87	-1.31%	-0.0%
DSES	1,229.70	1,246.16	-16.46	-1.32%	-9.9%
CDSET	1,126.18	1,138.52	-12.34	-1.08%	-6.4%

	Advanced	Declined	Unchanged	Total
All Category	64	301	32	397
A Category (Equity)	42	174	21	237
B Category (Equity)	16	78	7	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	6	45	4	55
Mutual Funds	2	28	7	37
Corporate Bonds	2	1	0	3
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,926,553	6,975,332	-0.7%
	Mn USD	57,745	58,152	
Turnover	Mn BDT	5,186	8,072	-35.7%
	Mn USD	43	67	
Volume	Mn Shares	154	238	-35.5%
No. of Trade		133,709	172,297	-22.4%

* Average Interbank Exchange Rate is BDT 119.95 as of Aug 20, 2024

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Figure: Sectorial Turnover (BDT Mn)

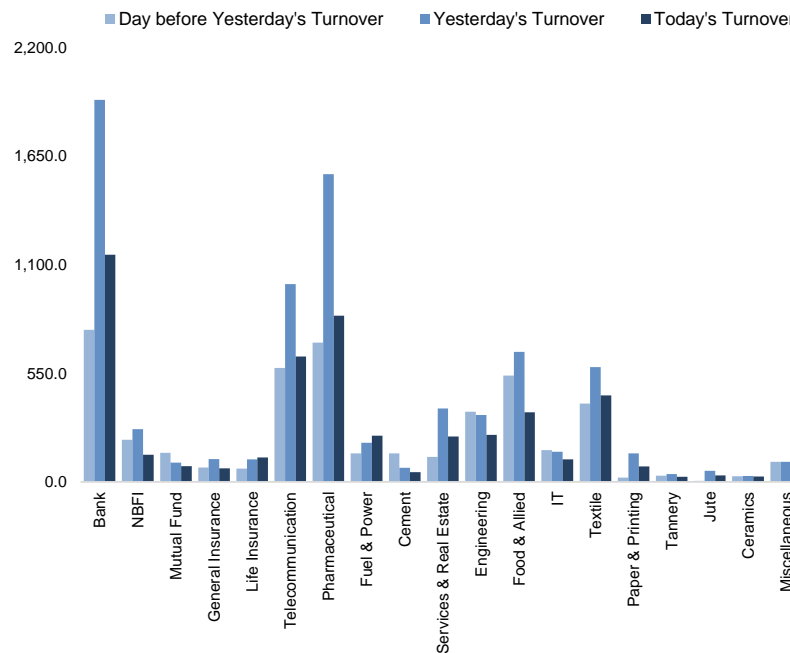
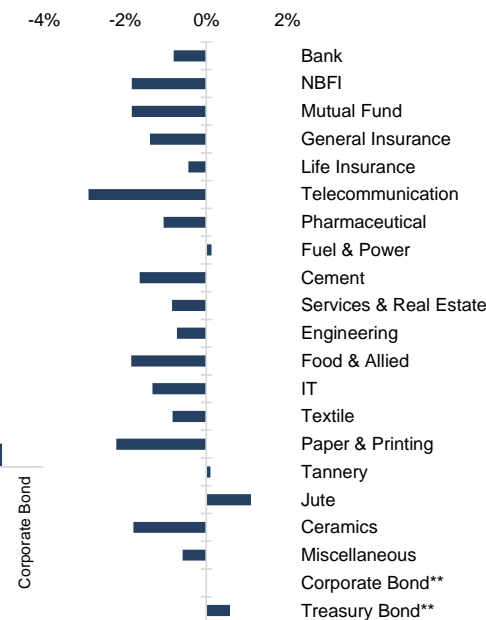


Figure: Sectorial Mcap Change



Market PE 15.9x
Market PB 1.3x

* 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	1,533	1,545	-12.36	-0.80%	36	734,281	10.6%	1,150.2	23.0%	8.0x	0.7x	GP	464,908	11.5%	534.1	13.2x	6.5x
NBFI	1,358	1,384	-25.41	-1.84%	23	131,476	1.9%	138.1	2.8%	NM	NM	BATBC	219,456	5.4%	127.2	12.6x	4.2x
Mutual Fund	700	713	-13.11	-1.84%	37	32,710	0.5%	79.0	1.6%	NM	0.6x	SQURPHARMA	203,884	5.1%	122.3	10.1x	1.7x
General Insurance	3,062	3,105	-43.04	-1.39%	43	88,698	1.3%	68.7	1.4%	16.1x	1.4x	WALTONHIL	187,876	4.7%	5.8	14.5x	1.7x
Life Insurance	2,155	2,164	-9.57	-0.44%	15	57,285	0.8%	123.1	2.5%	NM	NM	ROBI	161,328	4.0%	96.0	34.6x	2.5x
Telecommunication	5,596	5,764	-167.44	-2.91%	3	647,938	9.4%	634.8	12.7%	15.5x	4.3x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,227	3,261	-34.22	-1.05%	34	612,320	8.8%	841.9	16.9%	16.4x	1.8x	BRACBANK	92,733	2.3%	370.0	9.5x	1.3x
Fuel & Power	1,288	1,286	+1.71	+0.13%	23	339,046	4.9%	233.5	4.7%	22.2x	0.7x	RENATA	86,573	2.1%	102.2	37.7x	2.7x
Cement	2,464	2,506	-41.10	-1.64%	7	117,697	1.7%	48.8	1.0%	19.8x	2.6x	BERGERPBL	83,202	2.1%	2.5	25.7x	5.4x
Services & Real Estate	1,388	1,400	-11.82	-0.84%	9	76,734	1.1%	229.2	4.6%	24.0x	0.5x	UPGDCL	82,259	2.0%	6.2	11.0x	2.4x
Engineering	3,075	3,098	-22.41	-0.72%	42	355,293	5.1%	237.6	4.8%	15.0x	1.1x	LHBL	74,560	1.8%	23.4	15.7x	3.9x
Food & Allied	19,038	19,397	-358.43	-1.85%	21	349,541	5.0%	352.9	7.1%	18.6x	5.9x	ISLAMIBANK	67,298	1.7%	70.2	10.3x	0.9x
IT	2,537	2,571	-34.13	-1.33%	11	33,378	0.5%	114.2	2.3%	27.5x	2.2x	UNILEVERCL	58,158	1.4%	4.3	65.5x	26.5x
Textile	1,294	1,305	-10.86	-0.83%	58	134,292	1.9%	438.4	8.8%	NM	0.9x	ICB	54,117	1.3%	2.8	NM	1.3x
Paper & Printing	6,006	6,142	-136.37	-2.22%	6	27,554	0.4%	78.3	1.6%	38.7x	1.2x	DUTCHBANGL	47,280	1.2%	7.2	6.2x	1.0x
Tannery	2,336	2,333	+2.38	+0.10%	6	25,580	0.4%	25.3	0.5%	44.1x	2.4x	POWERGRID	37,832	0.9%	7.0	NM	0.2x
Jute	15,490	15,321	+168.97	+1.10%	3	3,630	0.1%	32.2	0.6%	NM	NM	EBL	36,670	0.9%	73.6	5.3x	0.9x
Ceramics	493	502	-9.01	-1.80%	5	21,897	0.3%	26.7	0.5%	58.4x	1.3x	BXPHARMA	34,841	0.9%	17.9	6.5x	0.7x
Miscellaneous	4,170	4,194	-24.25	-0.58%	15	227,215	3.3%	118.5	2.4%	38.4x	1.7x	OLYMPIC	33,530	0.8%	63.6	20.0x	3.2x
Corporate Bond**	6,835	6,835	-0.39	-0.01%	16	36,319	0.5%	0.0	0.0%	NM	NM	CITYBANK	30,983	0.8%	109.4	4.7x	0.8x
Treasury Bond**	326	324	+1.89	+0.59%	235	2,873,205	41.5%	19.6	0.4%	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	
AMANFEED	30.5	+7.0%	11.6	74.4x	1.1x	SQURPHARMA	117,112	8.6%	10.1x	1.7x	GP	344.3	-3.0%	534.1	13.2x	6.5x	
DSHGARME	86.0	+6.8%	3.7	NM	4.7x	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	52.4	+0.6%	370.0	9.5x	1.3x	
NRBBANK	12.8	+5.8%	74.8	15.5x	1.0x	BATBC	45,948	3.4%	12.6x	4.2x	JHRML	77.5	+2.4%	152.3	30.4x	2.3x	
ALARABANK	24.2	+5.2%	2.4	10.4x	1.1x	RENATA	35,002	2.6%	37.7x	2.7x	BATBC	406.4	-2.1%	127.2	12.6x	4.2x	
LRBDL	20.5	+5.1%	28.0	47.7x	0.5x	ISLAMIBANK	33,649	2.5%	10.3x	0.9x	SQURPHARMA	230.0	-0.2%	122.3	10.1x	1.7x	
MIDLANDBNK	23.8	+4.8%	44.9	12.8x	1.7x	BXPHARMA	32,479	2.4%	6.5x	0.7x	CITYBANK	23.0	-0.9%	109.4	4.7x	0.8x	
PRAGATILIF	187.9	+4.7%	55.5	NM	NM	BRACBANK	32,157	2.4%	9.5x	1.3x	RENATA	754.8	-1.7%	102.2	37.7x	2.7x	
NAVANAPHAR	71.1	+4.3%	25.9	18.2x	1.7x	GP	30,004	2.2%	13.2x	6.5x	ROBI	30.8	-2.8%	96.0	34.6x	2.5x	
SAIHAMCOT	18.5	+3.9%	67.2	19.5x	0.5x	LHBL	24,690	1.8%	15.7x	3.9x	SEAPEARL	56.8	-2.9%	83.9	19.1x	2.9x	
AL-HAJTEX	131.9	+3.7%	10.5	NM	14.5x	EBL	24,199	1.8%	5.3x	0.9x	AOL	24.4	+3.0%	76.8	15.6x	1.3x	
						PUBALIBANK	20,448	1.5%	3.6x	0.6x							
						NBL	16,930	1.2%	NM	1.7x							
						CITYBANK	16,830	1.2%	4.7x	0.8x							
						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%	20.0x	3.2x							
						UTTARABANK	11,350	0.8%	11.8x	0.8x							
						ORIONPHARM	11,317	0.8%	11.8x	0.6x							
						ROBI	10,738	0.8%	34.6x	2.5x							
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)	
SEMLFBSLGF	5.5	-8.3%	1.8	NM	0.5x						PRAGATILIF	195.0	175.0	17.0	251	44.69	
ISLAMIBANK	41.8	-4.8%	70.2	10.3x	1x						CRYSTALINS	70.1	67.8	5.0	477	32.43	
IDLC	38.9	-3.0%	5.0	10.5x	0.8x						BRACBANK	54.5	52.0	6.0	522	27.46	
NTC	262.6	-3.0%	1.9	NM	NM						BEACHHATCH	74.5	74.5	2.0	150	11.18	
HEIDELBCEM	328.1	-3.0%	0.9	46.0x	4.5x						CENTRALINS	42.0	41.1	2.0	260	10.81	
UNIONBANK	6.5	-3.0%	11.7	3.9x	0.4x						LOVELLO	86.0	82.0	2.0	106	9.10	
BXPHARMA	78.1	-3.0%	17.9	6.5x	0.7x						NRBCBANK	10.5	10.5	1.0	700	7.35	
SPCERAMICS	22.8	-3.0%	0.1	NM	0.7x						GP	385.0	345.0	4.0	16	5.74	
RUPALILIFE	140.1	-3.0%	8.7	NM	NM						PARAMOUNT	50.6	50.6	1.0	109	5.53	
ORIONINFU	388.0	-3.0%	3.0	NM	26.0x						AIL	98.5	94.2	3.0	50	4.86	

* 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
PRAGATILIF	195.0	175.0	44.7	251	17
CRYSTALINS	70.1	67.8	32.4	477	5
BRACBANK	54.5	52.0	27.5	522	6
BEACHHATCH	74.5	74.5	11.2	150	2
CENTRALINS	42.0	41.1	10.8	260	2
LOVELLO	86.0	82.0	9.1	106	2
NRBCBANK	10.5	10.5	7.4	700	1
GP	385.0	345.0	5.7	16	4
PARAMOUNT	50.6	50.6	5.5	109	1
AIL	98.5	94.2	4.9	50	3
SIMTEX	22.5	21.3	4.8	215	3
1STPRIMFMF	46.7	43.3	2.8	64	4
DUTCHBANGL	60.1	60.1	2.7	45	1
AL-HAJTEX	124.5	124.2	2.6	21	3
TAKAFULINS	37.0	37.0	2.4	65	1
EHL	88.1	88.1	1.9	22	1
RUPALILIFE	158.8	158.8	1.6	10	1
RUPALILIFE	158.8	158.8	1.6	10	1
MLDYEING	13.3	13.3	1.3	100	1
SUNLIFEINS	57.9	54.3	1.3	23	2
PREMIERCEM	62.9	62.9	1.3	21	1
CVOPRL	141.0	141.0	1.2	9	1
Total			195.1		78

Important DSE News
RINGSHINE

(Q3 Un-audited): EPS was Tk. (0.97) for January-March 2024 as against Tk. (0.73) for January-March 2023; EPS was Tk. (2.39) for July 2023-March 2024 as against Tk. (1.49) for July 2022-March 2023. NOCFPS was Tk. (1.37) for July 2023-March 2024 as against Tk. (0.13) for July 2022-March 2023. NAV per share without revaluation was Tk. (7.31) as on March 31, 2024 and Tk. (4.97) as on June 30, 2023.

SONARBAINS

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2023. Date of AGM: 30.09.2024, Time: 11:00 AM, Venue: Digital Platform. Record Date: 11.09.2024. The Company has also reported Consolidated EPS of Tk. 0.40, Consolidated NAV per share of Tk. 20.62 and Consolidated NOCFPS of Tk. (0.35) for the year ended December 31, 2023 as against Tk. 1.93 (restated), Tk. 20.89 and Tk. 2.83 (restated) respectively for the year ended December 31, 2022.

(Q2 Un-audited): Consolidated EPS was Tk. 0.17 for April-June 2024 as against Tk. 0.27 (restated) for April-June 2023; Consolidated EPS was Tk. 0.75 for January-June 2024 as against Tk. 1.08 (restated) for January-June 2023; Consolidated NOCFPS was Tk. 0.56 for January-June 2024 as against Tk. 1.43 (restated) for January-June 2023. Consolidated NAV per share was Tk. 21.41 as on June 30, 2024 and Tk. 20.62 as on June 30, 2023.

MIDASFIN

The company has informed that the Board of Directors has elected Mr. Abdul Karim as the Chairman of the Board of Directors of the company.

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
SONARBAINS		0.0%	10%	Record Date	11-Sep-24

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