

Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.90%) lost 108.4 points and closed at 5,606.96. The blue-chip index DS30 (-2.18%), the Shariah-based index DSES (-2.30%), and the large-cap index CDSET (-1.79%) closed at 2,047.63, 1,201.41, and 1,105.98 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 2.97% followed by Food & Allied (-2.80%), NBF (I) (-2.78%), Engineering (-2.53%), Fuel & Power (-1.94%), Pharmaceutical (-1.78%), and Bank (-1.74%), respectively. Block trades contributed 10.7% of the overall market turnover. Square Pharmaceuticals Ltd. (-1.2%) was the most traded share with a turnover of BDT 746 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,606.96	5,715.36	-108.40	-1.90%	-10.2%
DS30	2,047.63	2,093.27	-45.64	-2.18%	-2.2%
DSES	1,201.41	1,229.70	-28.29	-2.30%	-11.9%
CDSET	1,105.98	1,126.18	-20.20	-1.79%	-8.1%

	Advanced	Declined	Unchanged	Total
All Category	11	371	12	394
A Category (Equity)	4	221	10	235
B Category (Equity)	5	95	1	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	2	51	1	54
Mutual Funds	0	36	1	37
Corporate Bonds	0	2	1	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,829,342	6,926,553	-1.4%
	Mn USD	56,948	57,759	
Turnover	Mn BDT	5,368	5,186	+3.5%
	Mn USD	45	43	
Volume	Mn Shares	179	154	+16.2%
No. of Trade		86,068	133,709	-35.6%

* Average Interbank Exchange Rate is BDT 119.92 as of Aug 21, 2024

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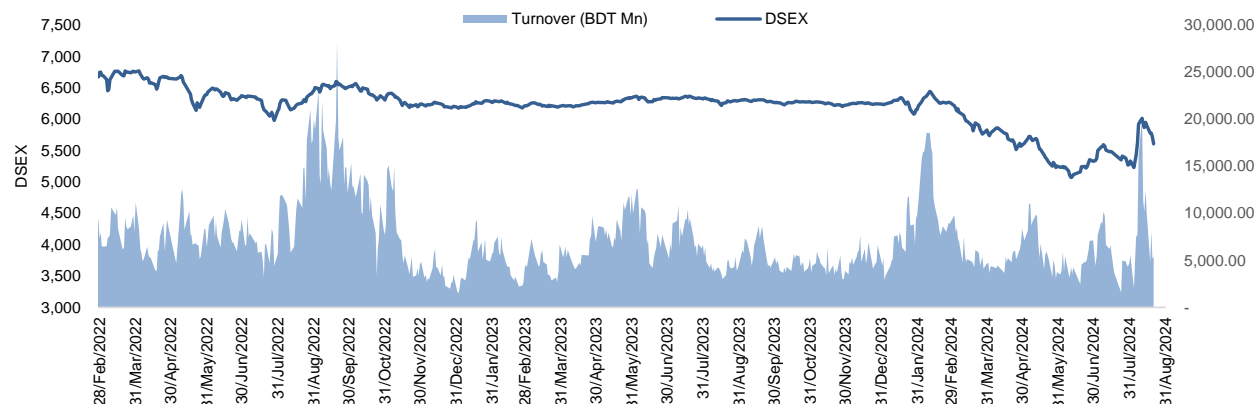


Figure: Sectorial Turnover (BDT Mn)

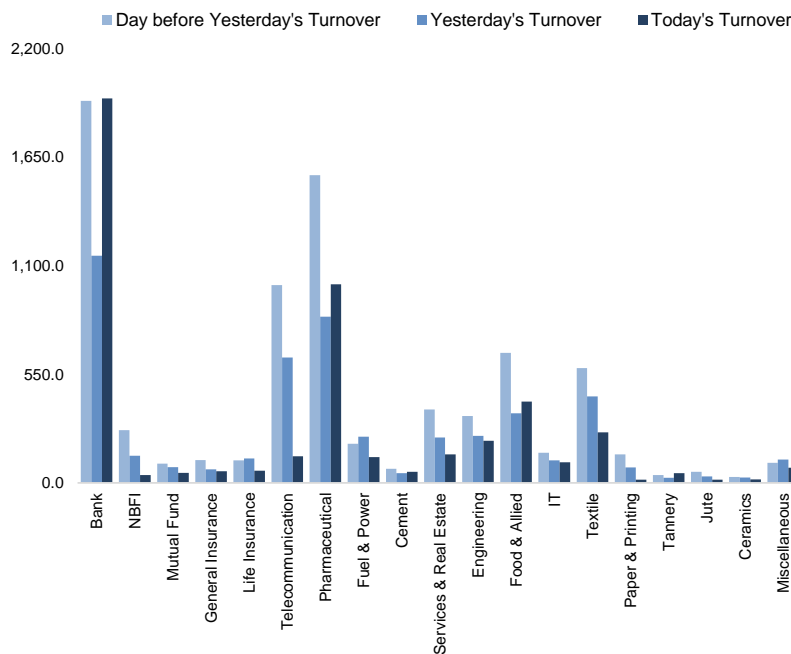
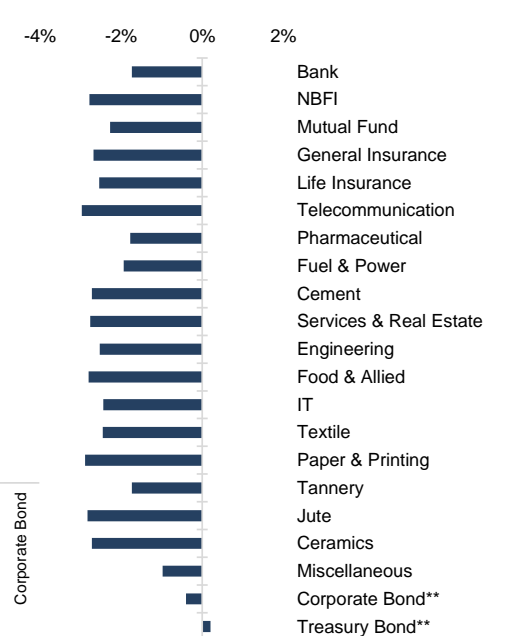


Figure: Sectorial Mcap Change



Market PE 15.5x
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	1,506	1,533	-26.66	-1.74%	36	721,513	10.6%	1,946.2	40.6%	7.8x	0.7x	GP	451,000	11.4%	115.1	12.8x	6.3x
NBFI	1,320	1,358	-37.81	-2.78%	23	127,816	1.9%	39.6	0.8%	NM	NM	BATBC	212,922	5.4%	118.5	12.2x	4.1x
Mutual Fund	684	700	-15.91	-2.27%	37	31,966	0.5%	51.3	1.1%	NM	0.6x	SQRPHARMA	201,490	5.1%	746.1	10.0x	1.7x
General Insurance	2,980	3,062	-82.07	-2.68%	43	86,321	1.3%	59.2	1.2%	15.6x	1.3x	WALTONHIL	182,393	4.6%	7.7	14.1x	1.7x
Life Insurance	2,100	2,155	-54.83	-2.54%	15	55,827	0.8%	62.1	1.3%	NM	NM	ROBI	156,614	4.0%	9.7	33.6x	2.5x
Telecommunication	5,430	5,596	-166.39	-2.97%	3	628,673	9.2%	134.5	2.8%	15.0x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,170	3,227	-57.31	-1.78%	34	601,446	8.8%	1,005.2	21.0%	16.1x	1.7x	BRACBANK	90,609	2.3%	403.2	9.3x	1.3x
Fuel & Power	1,263	1,288	-24.95	-1.94%	23	332,477	4.9%	130.2	2.7%	21.8x	0.7x	RENATA	84,933	2.2%	20.8	37.0x	2.6x
Cement	2,397	2,464	-67.19	-2.73%	7	114,488	1.7%	55.6	1.2%	19.3x	2.5x	BERGERPBL	82,117	2.1%	2.1	25.4x	5.4x
Services & Real Estate	1,349	1,388	-38.40	-2.77%	9	74,611	1.1%	144.4	3.0%	23.4x	0.5x	UPGDCL	79,824	2.0%	4.2	10.6x	2.4x
Engineering	2,997	3,075	-77.83	-2.53%	42	346,300	5.1%	213.5	4.5%	14.6x	1.1x	LHBL	72,470	1.8%	37.0	15.2x	3.8x
Food & Allied	18,505	19,038	-533.23	-2.80%	21	339,751	5.0%	412.0	8.6%	18.1x	5.7x	ISLAMIBANK	62,951	1.6%	65.8	9.7x	0.8x
IT	2,475	2,537	-61.91	-2.44%	11	32,564	0.5%	104.7	2.2%	26.9x	2.1x	UNILEVERCL	56,426	1.4%	1.6	63.6x	25.8x
Textile	1,263	1,294	-31.80	-2.46%	58	130,993	1.9%	255.6	5.3%	NM	0.9x	ICB	52,556	1.3%	0.6	NM	1.2x
Paper & Printing	5,832	6,006	-173.49	-2.89%	6	26,758	0.4%	16.1	0.3%	37.6x	1.2x	DUTCHBANGL	45,874	1.2%	16.6	6.0x	0.9x
Tannery	2,295	2,336	-40.62	-1.74%	6	25,135	0.4%	49.8	1.0%	43.3x	2.4x	POWERGRID	37,375	0.9%	6.5	NM	0.2x
Jute	15,052	15,490	-438.21	-2.83%	3	3,527	0.1%	16.8	0.4%	NM	NM	EBL	36,670	0.9%	54.4	5.3x	0.9x
Ceramics	480	493	-13.44	-2.73%	5	21,300	0.3%	17.9	0.4%	56.8x	1.3x	BXPHARMA	33,815	0.9%	8.9	6.3x	0.7x
Miscellaneous	4,129	4,170	-40.65	-0.97%	15	225,000	3.3%	77.0	1.6%	38.1x	1.7x	OLYMPIC	32,530	0.8%	30.4	19.4x	3.1x
Corporate Bond**	6,807	6,835	-27.35	-0.40%	16	35,859	0.5%	0.0	0.0%	NM	NM	CITYBANK	30,848	0.8%	246.5	4.7x	0.8x
Treasury Bond**	326	326	+0.67	+0.21%	235	2,866,568	42.0%	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
NBL	7.5	+8.7%	8.8	NM	1.9x	SQRPHARMA	117,112	8.6%	10.0x	1.7x	SQRPHARMA	227.3	-1.2%	746.1	10.0x	1.7x
NTC	278.6	+6.1%	1.3	NM	NM	BEXIMCO	69,460	5.1%	NM	1.2x	UCB	13.9	+2.2%	524.9	4.8x	0.5x
KAY&QUE	239.1	+3.7%	13.6	93.4x	2.6x	BATBC	45,948	3.4%	12.2x	4.1x	BRACBANK	51.2	-2.3%	403.2	9.3x	1.3x
UCB	13.9	+2.2%	524.9	4.8x	0.5x	RENATA	35,002	2.6%	37.0x	2.6x	CITYBANK	22.9	-0.4%	246.5	4.7x	0.8x
ATLASBANG	72.1	+2.1%	2.0	NM	0.6x	ISLAMIBANK	33,649	2.5%	9.7x	0.8x	DHAKABANK	12.5	-2.3%	158.3	6.6x	0.6x
LOVELLO	83.4	+2.1%	149.1	60.4x	6.3x	BXPHARMA	32,479	2.4%	6.3x	0.7x	LOVELLO	83.4	+2.1%	149.1	60.4x	6.3x
RUPALIBANK	27.0	+1.9%	2.7	18.7x	1x	BRACBANK	32,157	2.4%	9.3x	1.3x	TRUSTBANK	27.8	-1.4%	142.2	8.4x	1.0x
SUNLIFEINS	54.1	+1.5%	2.7	NM	NM	GP	30,004	2.2%	12.8x	6.3x	BATBC	394.3	-3.0%	118.5	12.2x	4.1x
RANFOUNDRY	160.0	+0.6%	2.7	NM	4.9x	LHBL	24,690	1.8%	15.2x	3.8x	GP	334.0	-3.0%	115.1	12.8x	6.3x
AGNISYSL	31.6	+0.3%	44.1	29.5x	1.9x	EBL	24,199	1.8%	5.3x	0.9x	SEAPEARL	55.1	-3.0%	80.0	18.5x	2.8x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIBANK	39.1	-6.5%	65.8	9.7x	0.8x	PUBALIBANK	20,448	1.5%	3.5x	0.6x	CITYBANK	23.0	23.0	7.0	12,000	276.00
TECHNODRUG	48.5	-3.0%	8.2	NM	2x	NBL	16,930	1.2%	NM	1.9x	BATBC	430.0	398.0	5.0	291	115.88
ACIFORMULA	132.6	-3.0%	4.5	22.2x	1.9x	CITYBANK	16,830	1.2%	4.7x	0.8x	GP	367.5	334.0	9.0	129	46.68
RUPALILIFE	135.9	-3.0%	0.5	NM	NM	BSRMLTD	14,210	1.0%	4.6x	0.6x	SQRPHARMA	228.0	228.0	1.0	80	18.24
SEAPEARL	55.1	-3.0%	80.0	18.5x	2.8x	ALARABANK	13,534	1.0%	10.4x	1.1x	1STPRIMFMF	46.0	44.5	13.0	332	15.06
LIBRAINFU	716.3	-3.0%	7.6	NM	0.9x	PRIMEBANK	12,985	1.0%	4.3x	0.7x	IFIC	9.7	9.7	1.0	1,299	12.60
KOHINOOR	541.5	-3.0%	7.1	47.8x	9.4x	OLYMPIC	12,616	0.9%	19.4x	3.1x	CRYSTALINS	65.8	65.8	3.0	160	10.56
GP	334.0	-3.0%	115.1	12.8x	6.3x	UTTARABANK	11,350	0.8%	11.5x	0.8x	AIL	107.3	94.7	5.0	105	10.16
UTTARAFIN	22.7	-3.0%	0.3	NM	0.3x	ORIONPHARM	11,317	0.8%	11.5x	0.5x	APEXFOOT	259.9	259.9	1.0	30	7.77
PHENIXINS	29.2	-3.0%	0.6	23.9x	0.9x	ROBI	10,738	0.8%	33.6x	2.5x	CITYGENINS	80.4	80.4	6.0	90	7.24

* 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
CITYBANK	23.0	23.0	276.0	12,000	7
BATBC	430.0	398.0	115.9	291	5
GP	367.5	334.0	46.7	129	9
SQURPHARMA	228.0	228.0	18.2	80	1
1STPRIMFMF	46.0	44.5	15.1	332	13
IFIC	9.7	9.7	12.6	1,299	1
CRYSTALINS	65.8	65.8	10.6	160	3
AIL	107.3	94.7	10.2	105	5
APEXFOOT	259.9	259.9	7.8	30	1
CITYGENINS	80.4	80.4	7.2	90	6
PRAGATILIF	182.5	182.5	6.6	36	1
ABBANK	11.1	11.1	5.6	500	4
DGIC	29.1	29.1	5.5	188	2
RUPALILIFE	135.9	135.9	4.1	30	1
RDFOOD	31.5	31.5	3.3	104	1
CENTRALINS	40.0	40.0	3.0	75	2
DBH	41.9	41.9	2.1	50	2
DBH	41.9	41.9	2.1	50	2
MLDYEING	13.3	13.3	1.9	144	1
MIDLANDBNK	23.5	23.5	1.9	80	1
RELIANCE1	18.1	18.1	1.6	90	1
LOVELLO	89.8	79.9	1.6	19	2
Total			576.6		92

Important DSE News
GLOBALINS

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2023. Date of AGM: 26.10.2024, Time: 11:00 AM, Venue: Through Hybrid System at Banquet Hall, "FARS Hotel & Resorts" 212, Shaheed Syed Nazrul Islam Sarani, Purana Paltan, Dhaka, with both physical presence and Digital Platform. The Link to join the meeting will be notified later. Record Date: 01.10.2024. The Company has also reported Consolidated EPS of Tk. 1.38, Consolidated NAV per share of Tk. 13.96 and Consolidated NOCFPS of Tk. 0.68 for the year ended December 31, 2023 as against Tk. 1.63, Tk. 13.80 and Tk. 4.09 respectively for the year ended December 31, 2022.

(Q1 Un-audited): EPS was Tk. 0.35 for January-March 2024 as against Tk. 0.31 for January-March 2023. NOCFPS was Tk. 0.37 for January-March 2024 as against Tk. 0.27 for January-March 2023. NAV per share was Tk. 14.31 as on March 31, 2024 and Tk. 14.12 as on March 31, 2023.

(Q2 Un-audited): EPS was Tk. 0.30 for April-June 2024 as against Tk. 0.29 for April-June 2023; EPS was Tk. 0.65 for January-June 2024 as against Tk. 0.60 for January-June 2023. NOCFPS was Tk. 0.15 for January-June 2024 as against Tk. 0.54 for January-June 2023. NAV per share was Tk. 14.61 as on June 30, 2024 and Tk. 14.40 as on June 30, 2023.

DOREENPWR

The company has informed that the Board of Directors of the Company has decided to sale all non-current assets including 244.54 decimal land of Tangail 22 MW Power Plant (one of the three power plants of the company) as the extension proposal of the Power Purchase Agreement (PPA) with Bangladesh Power Development Board (BPDB) is pending for long time and extension possibility is uncertain.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GLOBALINS		0.0%	10%	Record Date	1-Oct-24

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