

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.66%) gained 92.96 points and closed at 5,699.92. The blue-chip index DS30 (+2.10%), the Shariah-based index DSES (+1.47%), and the large-cap index CDSET (+2.54%) closed at 2,090.59, 1,219.08, and 1,134.06 points, respectively. All the large-cap sectors posted positive performance today. Bank booked the highest gain of 4.62% followed by Food & Allied (+3.73%), Telecommunication (+2.81%), NBF1 (+1.80%), Engineering (+1.29%), Fuel & Power (+1.01%), and Pharmaceutical (+0.64%), respectively. Block trades contributed 2.4% of the overall market turnover. Grameenphone Ltd. (+3.7%) was the most traded share with a turnover of BDT 847 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,699.92	5,606.96	+92.96	+1.66%	-8.8%
DS30	2,090.59	2,047.63	+42.96	+2.10%	-0.2%
DSES	1,219.08	1,201.41	+17.66	+1.47%	-10.6%
CDSET	1,134.06	1,105.98	+28.08	+2.54%	-5.7%

	Advanced	Declined	Unchanged	Total
All Category	151	210	33	394
A Category (Equity)	106	107	22	235
B Category (Equity)	33	61	7	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	12	38	4	54
Mutual Funds	13	14	10	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,928,318	6,829,342	+1.4%
	Mn USD	57,736	56,911	
Turnover	Mn BDT	7,786	5,368	+45.0%
	Mn USD	65	45	
Volume	Mn Shares	283	179	+58.5%
No. of Trade		152,175	86,068	+76.8%

* Average Interbank Exchange Rate is BDT 120.00 as of Aug 22, 2024

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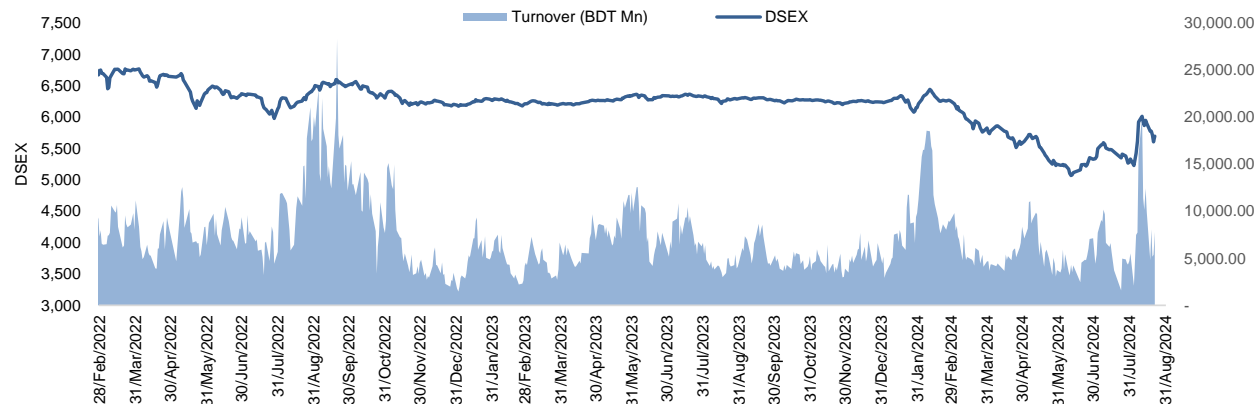


Figure: Sectorial Turnover (BDT Mn)

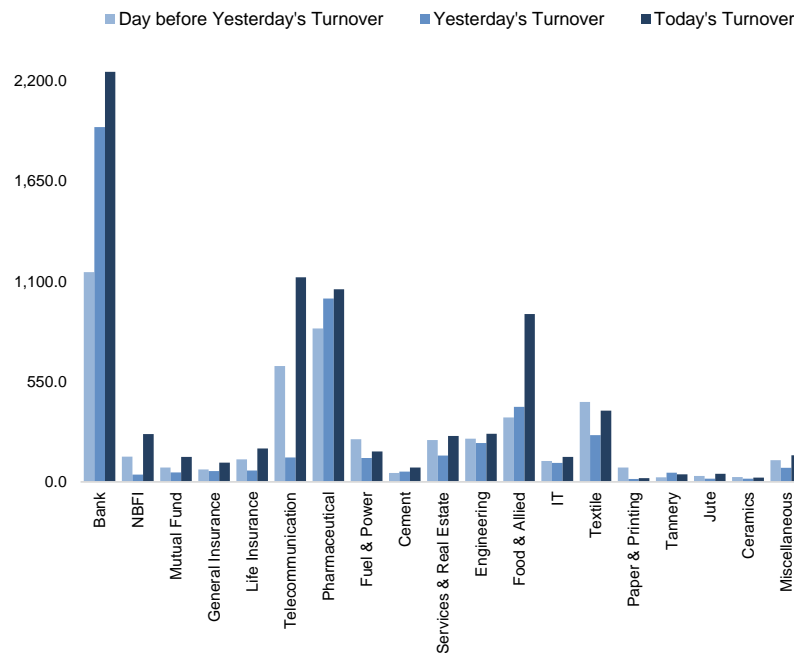
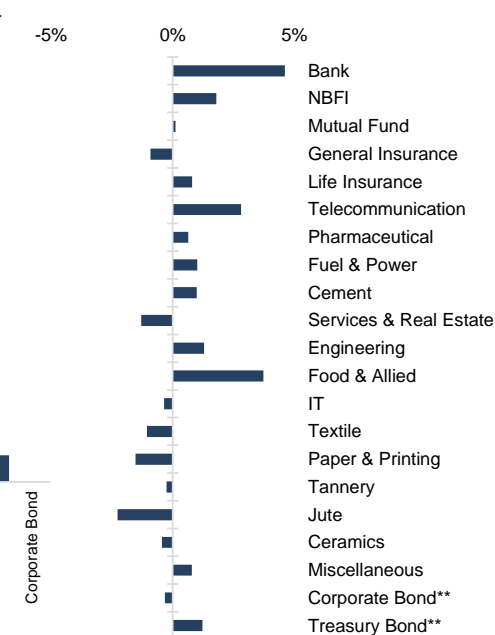


Figure: Sectorial Mcap Change



Market PE 15.8x

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	1,576	1,506	+69.53	+4.62%	36	754,817	10.9%	2,248.3	29.6%	8.2x	0.8x	GP	467,474	11.6%	846.6	13.2x	6.5x
NBFI	1,344	1,320	+23.74	+1.80%	23	130,114	1.9%	261.7	3.4%	NM	NM	BATBC	221,292	5.5%	227.1	12.7x	4.2x
Mutual Fund	685	684	+0.77	+0.11%	37	32,002	0.5%	137.0	1.8%	NM	0.6x	SQRPHARMA	204,150	5.1%	156.0	10.1x	1.7x
General Insurance	2,953	2,980	-27.34	-0.92%	43	85,529	1.2%	105.8	1.4%	15.5x	1.3x	WALTONHIL	185,695	4.6%	9.6	14.3x	1.7x
Life Insurance	2,117	2,100	+16.76	+0.80%	15	56,273	0.8%	182.5	2.4%	NM	NM	ROBI	157,662	3.9%	257.3	33.8x	2.5x
Telecommunication	5,582	5,430	+152.47	+2.81%	3	646,326	9.3%	1,122.4	14.8%	15.4x	4.3x	BEXIMCO	103,842	2.6%	0.3	NM	1.2x
Pharmaceutical	3,190	3,170	+20.43	+0.64%	34	605,321	8.7%	1,055.6	13.9%	16.2x	1.7x	BRACBANK	94,149	2.3%	369.2	9.7x	1.3x
Fuel & Power	1,276	1,263	+12.73	+1.01%	23	335,829	4.8%	166.1	2.2%	22.0x	0.7x	RENATA	87,490	2.2%	68.0	38.1x	2.7x
Cement	2,421	2,397	+23.69	+0.99%	7	115,619	1.7%	78.8	1.0%	19.5x	2.5x	BERGERPBL	83,837	2.1%	4.5	25.9x	5.5x
Services & Real Estate	1,332	1,349	-17.42	-1.29%	9	73,648	1.1%	252.5	3.3%	23.1x	0.5x	UPGDCL	81,331	2.0%	3.0	10.9x	2.4x
Engineering	3,036	2,997	+38.61	+1.29%	42	350,761	5.1%	264.3	3.5%	14.8x	1.1x	LHBL	73,863	1.8%	31.2	15.5x	3.8x
Food & Allied	19,196	18,505	+690.86	+3.73%	21	352,435	5.1%	920.1	12.1%	18.7x	6.0x	ISLAMIBANK	69,230	1.7%	142.7	10.6x	0.9x
IT	2,467	2,475	-8.67	-0.35%	11	32,450	0.5%	136.8	1.8%	26.8x	2.1x	UNILEVERCL	58,199	1.4%	202.9	65.6x	26.6x
Textile	1,249	1,263	-13.41	-1.06%	58	129,602	1.9%	390.2	5.1%	NM	0.9x	ICB	53,770	1.3%	4.2	NM	1.3x
Paper & Printing	5,743	5,832	-89.01	-1.53%	6	26,350	0.4%	20.3	0.3%	37.0x	1.1x	DUTCHBANGL	48,071	1.2%	32.8	6.3x	1.0x
Tannery	2,289	2,295	-5.81	-0.25%	6	25,071	0.4%	40.7	0.5%	43.2x	2.4x	POWERGRID	38,380	1.0%	17.9	NM	0.2x
Jute	14,711	15,052	-341.63	-2.27%	3	3,447	0.0%	44.4	0.6%	NM	NM	EBL	37,077	0.9%	109.2	5.3x	0.9x
Ceramics	478	480	-2.15	-0.45%	5	21,204	0.3%	24.2	0.3%	56.5x	1.3x	OLYMPIC	35,709	0.9%	285.6	21.3x	3.4x
Miscellaneous	4,162	4,129	+32.46	+0.79%	15	226,769	3.3%	146.1	1.9%	38.4x	1.7x	BXPHARMA	32,834	0.8%	12.9	6.2x	0.7x
Corporate Bond**	6,786	6,807	-21.56	-0.32%	16	35,430	0.5%	0.2	0.0%	NM	NM	CITYBANK	32,330	0.8%	185.6	4.9x	0.9x
Treasury Bond**	330	326	+4.00	+1.23%	235	2,888,859	41.7%	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
SIBL	11.0	+10.0%	42.9	5.7x	0.5x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	GP	346.2	+3.7%	846.6	13.2x	6.5x
ISLAMIBANK	43.0	+10.0%	142.7	10.6x	0.9x	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	53.2	+3.9%	369.2	9.7x	1.3x
OLYMPIC	178.6	+9.8%	285.6	21.3x	3.4x	BATBC	45,948	3.4%	12.7x	4.2x	OLYMPIC	178.6	+9.8%	285.6	21.3x	3.4x
UNIONBANK	7.0	+9.4%	28.8	4.2x	0.4x	RENATA	35,002	2.6%	38.1x	2.7x	JHRML	73.2	-2.7%	264.0	28.7x	2.2x
NBL	8.2	+9.3%	88.6	NM	2.1x	ISLAMIBANK	33,649	2.5%	10.6x	0.9x	ROBI	30.1	+0.7%	257.3	33.8x	2.5x
GIB	7.1	+9.2%	135.0	4.8x	0.5x	BXPHARMA	32,479	2.4%	6.2x	0.7x	BATBC	409.8	+3.9%	227.1	12.7x	4.2x
FAREASTLIF	40.3	+9.2%	16.5	NM	NM	BRACBANK	32,157	2.4%	9.7x	1.3x	UCB	14.0	+0.7%	216.5	5.0x	0.5x
DULAMIACOT	70.7	+9.1%	0.4	NM	NM	GP	30,004	2.2%	13.2x	6.5x	UNILEVERCL	3,019.5	+3.1%	202.9	65.6x	26.6x
ONEBANKPLC	9.9	+8.8%	49.4	5.1x	0.5x	LHBL	24,690	1.8%	15.5x	3.8x	IFIC	10.2	+5.2%	199.3	7.7x	0.5x
FIRSTSBANK	7.5	+8.7%	79.0	3.1x	0.3x	EBL	24,199	1.8%	5.3x	0.9x	CITYBANK	24.0	+4.8%	185.6	4.9x	0.9x

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)
PROVATIINS	35.6	-3.0%	3.3	22.4x	1.6x	SIBL	10.0	10.0	1.0	5,354	53.54
PARAMOUNT	42.1	-3.0%	15.6	17.3x	1x	PRAGATILIF	198.3	179.5	13.0	122	22.03
SONALIPAPR	200.8	-3.0%	3.6	61.0x	1.2x	GP	348.0	324.0	5.0	64	21.89
SALVOCHEM	38.9	-3.0%	33.3	19.1x	2.3x	MARICO	2,470.0	2,470.0	2.0	6	14.57
LIBRAINFU	694.9	-3.0%	13.3	NM	0.8x	1STPRIMFMF	44.9	43.2	12.0	272	11.92
AFCAGRO	13.0	-3.0%	3.2	NM	0.7x	RENATA	735.0	735.0	3.0	15	11.03
PAPERPROC	126.8	-3.0%	4.2	44.0x	1.8x	LOVELLO	82.9	80.9	3.0	86	7.00
ORIONPHARM	48.8	-3.0%	1.8	11.1x	0.5x	SALVOCHEM	42.8	39.2	4.0	104	4.16
GLOBALINS	29.3	-3.0%	1.9	20.5x	2.0x	BXPHARMA	73.6	73.6	2.0	43	3.17
ORIONINFU	365.2	-3.0%	24.6	NM	24.5x	CRYSTALINS	63.9	63.9	1.0	45	2.85

* 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
SIBL	10.0	10.0	53.5	5,354	1
PRAGATILIF	198.3	179.5	22.0	122	13
GP	348.0	324.0	21.9	64	5
MARICO	2,470.0	2,470.0	14.6	6	2
1STPRIMFMF	44.9	43.2	11.9	272	12
RENATA	735.0	735.0	11.0	15	3
LOVELLO	82.9	80.9	7.0	86	3
SALVOCHEM	42.8	39.2	4.2	104	4
BXPHARMA	73.6	73.6	3.2	43	2
CRYSTALINS	63.9	63.9	2.9	45	1
AIL	91.9	91.9	2.6	29	3
ACFL	17.8	17.6	2.5	144	2
SONALIANS	264.9	264.9	2.2	8	1
BRACBANK	55.3	55.3	2.2	40	1
TECHNODRUG	53.0	47.1	2.1	41	2
BEXIMCO	115.4	104.1	2.0	19	3
JHRML	82.5	82.4	2.0	24	2
JHRML	82.5	82.4	2.0	24	2
SAIFPOWER	19.5	19.5	2.0	100	1
ONEBANKPLC	9.1	9.0	1.8	200	2
BAYLEASING	12.7	12.7	1.5	120	1
AL-HAJTEX	129.0	126.0	1.5	12	2
Total			187.4		83

Important DSE News
DGIC

(Q2 Un-audited): EPS was Tk. 0.30 for April-June 2024 as against Tk. 0.34 for April-June 2023; EPS was Tk. 0.54 for January-June 2024 as against Tk. 0.70 for January-June 2023. NOCFPS was Tk. (0.22) for January-June 2024 as against Tk. 0.03 for January-June 2023. NAV per share was Tk. 12.44 as on June 30, 2024 and Tk. 11.90 as on December 31, 2023.

SBACBANK

The Company has informed that Mohammad Abdul Hye, one of the Sponsors of the company, passed away on 18.01.2022. A total of 17,41,077 shares out of his total holding of 17,58,487 shares of the company will be transmitted to the account of his nominee Mr. Abdullah Al-Mamun (Son of Late Mohammad Abdul Hye) by way of nomination.

GLOBALINS

The Company has informed that the Board of Directors of the company in its meeting held on June 29, 2024 has decided that Mr. S M Sazzad Hossain, Deputy Managing Director and In-Charge of Internal Audit and Inspection Department of Head Office, Dhaka will hold the Current Charge (CC) of the office of Chief Executive Officer (CEO) with effect from July 15, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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