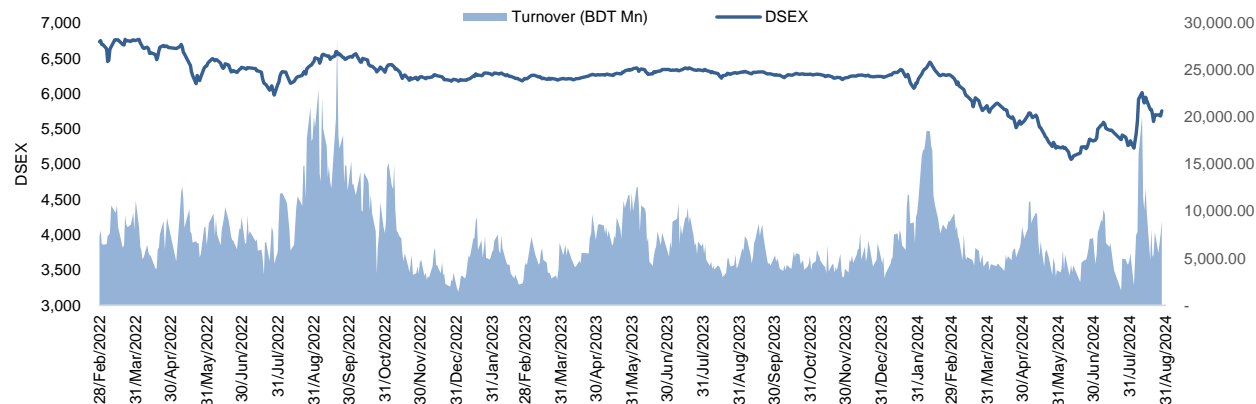


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.25%) gained 70.93 points and closed at 5,756.71. The blue-chip index DS30 (+1.46%), the Shariah-based index DSES (+1.42%), and the large-cap index CDSET (+0.99%) closed at 2,117.93, 1,234.37, and 1,142.55 points, respectively. All the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 5.05% followed by Engineering (+3.77%), Food & Allied (+2.47%), Fuel & Power (+1.79%), NBF1 (+1.69%), Pharmaceutical (+0.52%), and Bank (+0.22%), respectively. Block trades contributed 16.1% of the overall market turnover. BRAC Bank Ltd. (+1.7%) was the most traded share with a turnover of BDT 476 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,756.71	5,685.78	+70.93	+1.25%	-7.8%
DS30	2,117.93	2,087.47	+30.46	+1.46%	+1.2%
DSES	1,234.37	1,217.09	+17.27	+1.42%	-9.5%
CDSET	1,142.55	1,131.35	+11.20	+0.99%	-5.0%

	Advanced	Declined	Unchanged	Total
All Category	271	79	48	398
A Category (Equity)	174	35	29	238
B Category (Equity)	64	25	12	101
N Category (Equity)	2	1	1	4
Z Category (Equity)	31	18	6	55
Mutual Funds	21	4	12	37
Corporate Bonds	1	1	1	3
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,956,752	6,894,114	+0.9%
	Mn USD	57,973	57,451	
Turnover	Mn BDT	8,986	7,502	+19.8%
	Mn USD	75	63	
Volume	Mn Shares	256	197	+30.0%
No. of Trade		176,993	140,569	+25.9%

* Average Interbank Exchange Rate is BDT 120.00 as of Aug 28, 2024

Fahim Hassan Research Analyst (884) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (884) 1708845202 mistiaz.uddin@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

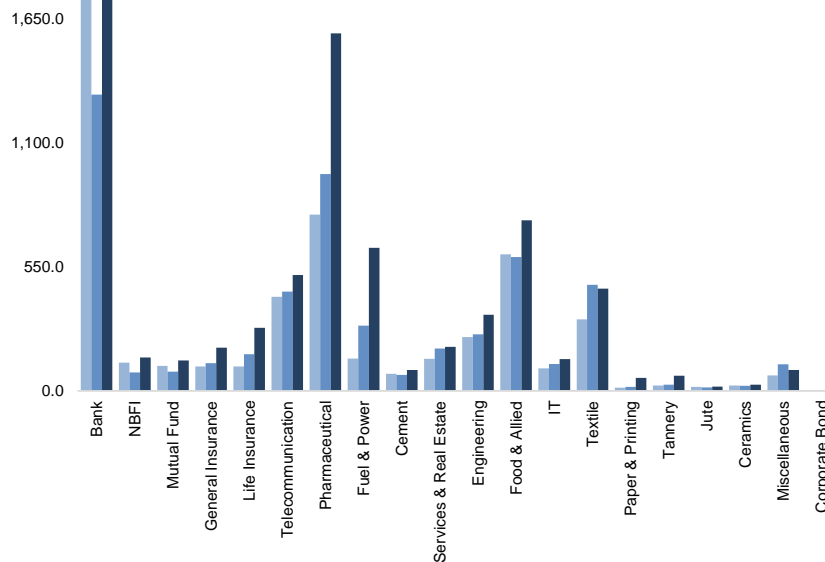
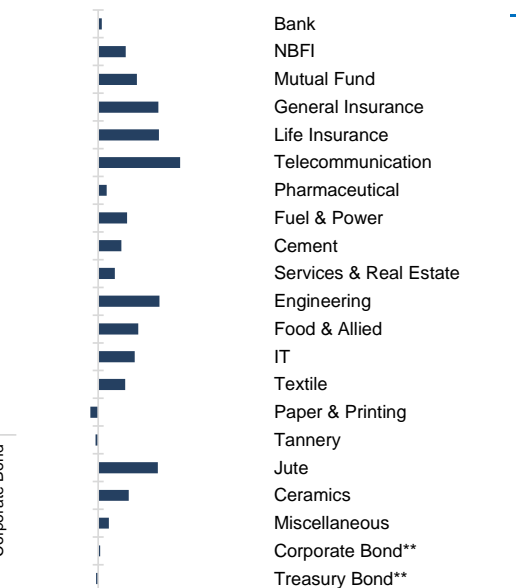


Figure: Sectorial Mcap Change

-5% 0% 5% 10%



Market PE 16.0x
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	1,565	1,562	+3.48	+0.22%	36	749,676	10.8%	1,818.1	24.1%	8.1x	0.7x	GP	471,120	11.6%	368.9	13.3x	6.6x
NBFI	1,331	1,309	+22.15	+1.69%	23	128,885	1.9%	147.8	2.0%	NM	NM	BATBC	223,506	5.5%	151.5	12.7x	3.9x
Mutual Fund	699	682	+16.29	+2.39%	37	32,640	0.5%	134.2	1.8%	NM	0.6x	SQRPHARMA	207,873	5.1%	222.9	10.3x	1.7x
General Insurance	3,081	2,971	+110.53	+3.72%	43	89,249	1.3%	191.1	2.5%	16.2x	1.4x	WALTONHIL	203,840	5.0%	41.7	15.7x	1.9x
Life Insurance	2,320	2,236	+83.71	+3.74%	15	61,672	0.9%	279.4	3.7%	NM	NM	ROBI	160,805	3.9%	127.6	34.5x	2.5x
Telecommunication	5,647	5,376	+271.72	+5.05%	3	653,873	9.4%	513.8	6.8%	15.6x	4.3x	BEXIMCO	103,842	2.5%	0.0	NM	1.2x
Pharmaceutical	3,213	3,197	+16.61	+0.52%	34	609,708	8.8%	1,584.0	21.0%	16.3x	1.8x	BRACBANK	94,680	2.3%	475.8	9.7x	1.3x
Fuel & Power	1,315	1,292	+23.15	+1.79%	23	346,303	5.0%	634.0	8.4%	22.7x	0.8x	RENATA	87,399	2.1%	231.3	38.1x	2.7x
Cement	2,465	2,430	+34.61	+1.42%	7	117,721	1.7%	92.2	1.2%	19.8x	2.6x	BERGERPBL	83,012	2.0%	3.1	25.7x	5.4x
Services & Real Estate	1,319	1,305	+13.45	+1.03%	9	72,912	1.0%	195.2	2.6%	22.8x	0.5x	UPGDCL	81,853	2.0%	3.7	10.9x	2.4x
Engineering	3,209	3,092	+116.71	+3.77%	42	370,758	5.3%	336.9	4.5%	15.6x	1.2x	MARICO	73,883	1.8%	30.8	14.8x	7.4x
Food & Allied	19,455	18,985	+469.49	+2.47%	21	357,183	5.1%	755.6	10.0%	18.8x	5.6x	ISLAMIBANK	68,586	1.7%	61.1	10.5x	0.9x
IT	2,450	2,396	+54.15	+2.26%	11	32,236	0.5%	140.5	1.9%	26.6x	2.1x	UNILEVERCL	58,068	1.4%	5.0	65.4x	26.5x
Textile	1,287	1,265	+21.03	+1.66%	58	133,482	1.9%	452.5	6.0%	NM	0.9x	ICB	53,510	1.3%	2.8	NM	1.3x
Paper & Printing	5,420	5,446	-25.86	-0.47%	6	24,868	0.4%	57.3	0.8%	38.8x	1.1x	DUTCHBANGL	47,280	1.2%	13.5	6.2x	1.0x
Tannery	2,260	2,264	-3.75	-0.17%	6	24,750	0.4%	67.8	0.9%	42.7x	2.3x	POWERGRID	38,928	1.0%	7.2	NM	0.2x
Jute	14,695	14,174	+521.00	+3.68%	3	3,444	0.0%	18.7	0.2%	NM	NM	OLYMPIC	38,888	1.0%	383.3	23.2x	3.7x
Ceramics	475	466	+8.77	+1.88%	5	21,080	0.3%	27.0	0.4%	56.2x	1.3x	EBL	36,670	0.9%	13.1	5.3x	0.9x
Miscellaneous	4,174	4,147	+27.19	+0.66%	15	227,442	3.3%	91.9	1.2%	38.5x	1.7x	BXPHARMA	34,217	0.8%	149.6	6.4x	0.7x
Corporate Bond**	6,752	6,744	+8.35	+0.12%	16	34,307	0.5%	0.4	0.0%	NM	NM	MJLBD	32,372	0.8%	391.8	10.4x	2.2x
Treasury Bond**	332	333	-0.42	-0.13%	235	2,864,071	41.2%	1.5	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
KBPPWBIL	94.8	+10.0%	4.7	NM	8.0x	SQRPHARMA	117,112	8.6%	10.3x	1.7x	BRACBANK	53.5	+1.7%	475.8	9.7x	1.3x
CENTRALPHL	16.6	+9.9%	54.8	NM	2.3x	BEXIMCO	69,460	5.1%	NM	1.2x	MJLBD	102.2	+6.9%	391.8	10.4x	2.2x
KARNAPHULI	32.1	+9.9%	35.3	16.5x	1.4x	BATBC	45,948	3.4%	12.7x	3.9x	OLYMPIC	194.5	+4.1%	383.3	23.2x	3.7x
NATLIFEINS	138.4	+9.9%	59.9	NM	NM	RENATA	35,002	2.6%	38.1x	2.7x	GP	348.9	+5.8%	368.9	13.3x	6.6x
EIL	43.4	+9.9%	10.6	38.4x	2.3x	ISLAMIBANK	33,649	2.5%	10.5x	0.9x	TRUSTBANK	28.0	-	287.4	8.2x	1.0x
ILFSL	4.5	+9.8%	0.5	NM	NM	BXPHARMA	32,479	2.4%	6.4x	0.7x	RENATA	762.0	+1.9%	231.3	38.1x	2.7x
PEOPLESINS	33.8	+9.7%	7.0	12.9x	1x	BRACBANK	32,157	2.4%	9.7x	1.3x	SQRPHARMA	234.5	+0.3%	222.9	10.3x	1.7x
DACCADYE	14.0	+9.4%	12.9	NM	0.4x	GP	30,004	2.2%	13.3x	6.6x	JHRML	74.8	+1.4%	180.8	29.3x	2.2x
FAREASTFIN	4.9	+8.9%	0.8	NM	NM	LHBL	24,690	1.8%	15.9x	3.9x	MIDLANDBNK	27.5	+1.1%	168.3	14.8x	1.9x
GLDNJMF	11.1	+8.8%	13.4	NM	1.1x	EBL	24,199	1.8%	5.3x	0.9x	BATBC	413.9	+2.4%	151.5	12.7x	3.9x
						PUBALIBANK	20,448	1.5%	3.6x	0.6x						
						NBL	16,930	1.2%	NM	1.9x						
						CITYBANK	16,830	1.2%	4.7x	0.8x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.3x	1.1x						
						PRIMEBANK	12,985	1.0%	4.5x	0.7x						
						OLYMPIC	12,616	0.9%	23.2x	3.7x						
						UTTARABANK	11,350	0.8%	11.6x	0.8x						
						ORIONPHARM	11,317	0.8%	10.6x	0.5x						
						ROBI	10,738	0.8%	34.5x	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)
MARICO	2,345.5	-3.0%	30.8	14.8x	7.4x						BATBC	418.5	405.0	6.0	1,647	681.44
SALVOCHEM	35.6	-3.0%	34.3	17.5x	2x						PRIMEBANK	24.0	23.5	2.0	13,000	309.50
LOVELLO	74.5	-3.0%	5.4	54.0x	5.6x						JAMUNABANK	19.7	18.8	6.0	14,450	284.62
KAY&QUE	247.9	-3.0%	12.6	96.8x	2.7x						BEACHHATCH	76.2	72.5	24.0	473	34.71
ORIONINFU	333.5	-3.0%	104.2	NM	22.4x						KBPPWBIL	92.0	84.0	13.0	265	22.45
SONALIPAPR	183.4	-3.0%	2.7	NM	1.1x						AIL	84.7	84.1	6.0	173	14.59
SPCERAMICS	19.8	-2.9%	0.1	90.0x	0.6x						CITYGENINS	81.6	81.6	7.0	150	12.24
HAMI	112.7	-2.9%	4.9	NM	12.4x						BRACBANK	53.5	53.4	2.0	200	10.69
BXPHARMA	76.7	-2.9%	149.6	6.4x	0.7x						1STPRIMFMF	46.0	46.0	5.0	229	10.53
ORIONPHARM	46.7	-2.9%	80.2	10.6x	0.5x						LOVELLO	84.4	79.1	5.0	111	9.21

* 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
BATBC	418.5	405.0	681.4	1,647	6
PRIMEBANK	24.0	23.5	309.5	13,000	2
JAMUNABANK	19.7	18.8	284.6	14,450	6
BEACHHATCH	76.2	72.5	34.7	473	24
KBPPWBIL	92.0	84.0	22.4	265	13
AIL	84.7	84.1	14.6	173	6
CITYGENINS	81.6	81.6	12.2	150	7
BRACBANK	53.5	53.4	10.7	200	2
1STPRIMFMF	46.0	46.0	10.5	229	5
LOVELLO	84.4	79.1	9.2	111	5
RELIANCE1	18.4	18.1	8.7	474	4
HEIDELBCEM	318.0	317.8	6.1	19	3
MIDLANDBNK	27.0	26.5	5.4	200	2
AGNISYSL	32.0	31.0	5.0	157	3
PRAGATILIF	204.3	204.3	3.7	18	1
BXPHARMA	78.8	76.7	2.9	37	3
PREMIERCEM	61.5	61.5	2.2	36	1
PREMIERCEM	61.5	61.5	2.2	36	1
BEXIMCO	104.1	104.1	1.9	18	3
EGEN	33.0	33.0	1.7	50	1
EIL	39.5	39.5	1.6	40	2
TOSRIFA	27.0	27.0	1.4	50	1
Total			1,446.5		123

Important DSE News

SONALIPAPR

(Q2 Un-audited): EPS was Tk. (0.17) for October-December 2023 as against Tk. (0.87) (adjusted) for October-December 2022; EPS was Tk. 5.40 for July-December 2023 as against Tk. 6.15 (adjusted) for July-December 2022. NOCFPS was Tk. 12.17 for July-December 2023 as against Tk. 2.16 for July-December 2022. NAV per share was Tk. 166.34 as on December 31, 2023 and Tk. 164.94 as on June 30, 2023.

(Q3 Un-audited): EPS was Tk. (3.60) for January-March 2024 as against Tk. (0.75) (adjusted) for January-March 2023; EPS was Tk. 1.80 for July 2023-March 2024 as against Tk. 5.40 (adjusted) for July 2022-March 2023. NOCFPS was Tk. 14.03 for July 2023-March 2024 as against Tk. 4.05 for July 2022-March 2023. NAV per share was Tk. 162.74 as on March 31, 2024 and Tk. 164.94 as on June 30, 2023.

KARNAPHULI

Meghna Life Insurance Co. Ltd., a Corporate Director of the Company, has expressed its intention to buy 2,97,523 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within next 30 working days.

DGIC

Mr. Tahrin Aman, a Director of the company, has expressed his intention to receive 1,60,000 shares of the company from his mother Ms. Tazneen Aman (a General Shareholder of the company), by way of gift, outside the trading system of the Exchange within next 30 working days with effect from August 20, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
FAREASTFIN		0.0%	0%	Record Date	3-Sep-24
LANKABAFIN		0.0%	10%	Record Date	4-Sep-24
DELTA LIFE		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

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.