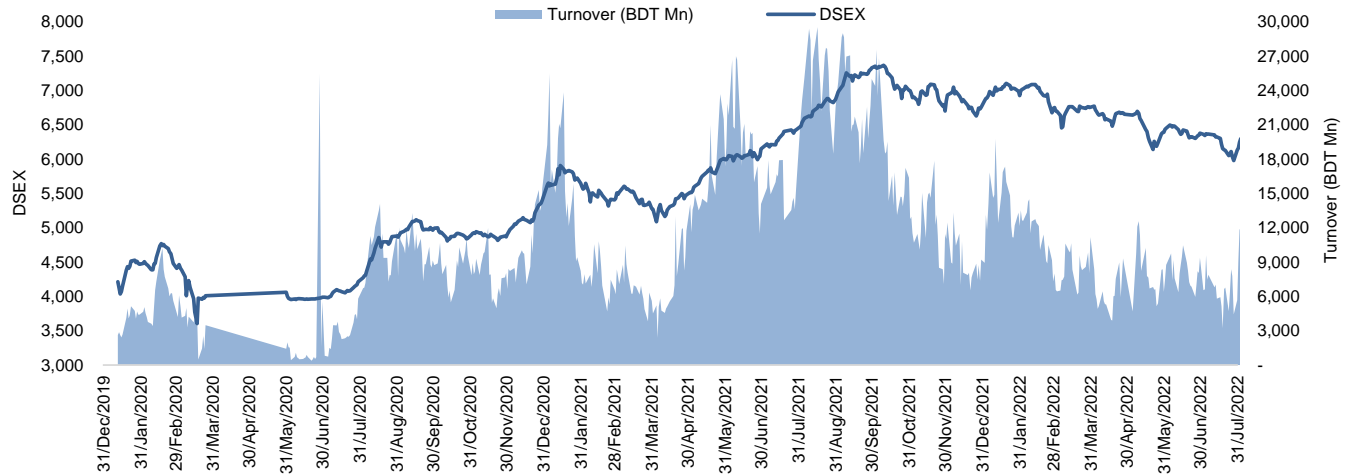


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.10%) gained 6.18 points and closed at 6,407.98. The blue-chip index DS30 (+0.19%), the Shariah-based index DSES (+0.21%), and the large-cap index CDSET (+0.38%) closed at 2,275.36, 1,393.35, and 1,247.74 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 1.12% followed by Food & Allied (+0.52%), Fuel & Power (+0.38%), Bank (+0.18%). NBFi experienced the highest loss of 1.92% followed by Pharmaceutical (-0.18%), Engineering (-0.05%). Block trades contributed 0.5% of the overall market turnover. Bangladesh Export Import Company Ltd. (+0.7%) was the most traded share with a turnover of BDT 850 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 6,407.98 | 6,401.81 | +6.18 | +0.10% | -5.2% |
| DS30 | 2,275.36 | 2,271.01 | +4.35 | +0.19% | -10.2% |
| DSES | 1,393.35 | 1,390.41 | +2.94 | +0.21% | -2.6% |
| CDSET | 1,247.74 | 1,243.07 | +4.67 | +0.38% | -8.2% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 123 | 188 | 71 | 382 |
| A Category (Equity) | 88 | 137 | 35 | 260 |
| B Category (Equity) | 31 | 41 | 21 | 93 |
| N Category (Equity) | 0 | 3 | 3 | 6 |
| Z Category (Equity) | 4 | 7 | 12 | 23 |
| Mutual Funds | 5 | 8 | 22 | 35 |
| Corporate Bonds | 1 | 0 | 2 | 3 |

| | | Today | Last Day | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap | Mn BDT | 5,167,560 | 5,160,119 | |
| | Mn USD | 54,395 | 54,317 | +0.1% |
| Turnover | Mn BDT | 17,449 | 21,051 | -17.1% |
| | Mn USD | 184 | 222 | |
| Volume | Mn Shares | 427 | 526 | -18.8% |
| No. of Trade | | 287,601 | 317,330 | -9.4% |

* Exchange Rate is BDT 95.00 as of Aug 29, 2022

Figure: Sectorial Turnover (BDT)

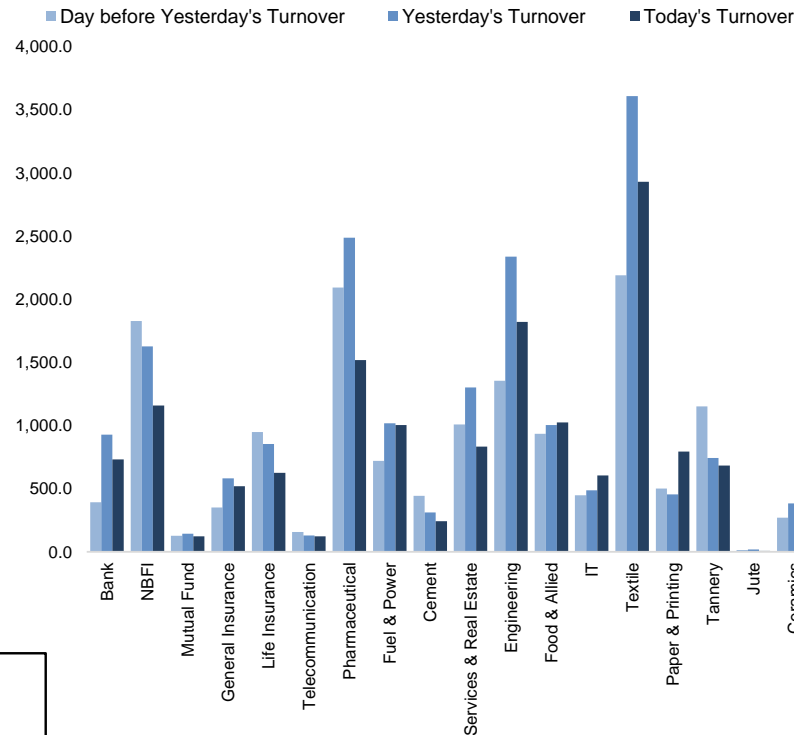
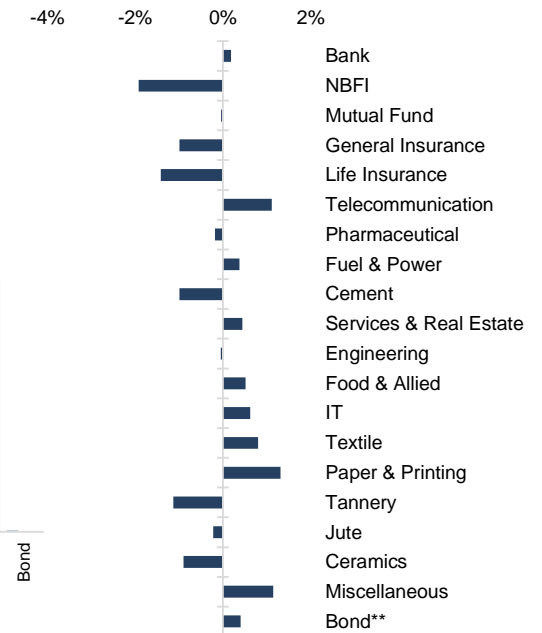


Figure: Sectorial Mcap Change



Market PE 15.8x
Market PB 1.7x

| | |
|---|---|
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|---|---|

| 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 | 1,456 | 1,453 | +2.64 | +0.18% | 33 | 671,511 | 14.7% | 731.3 | 4.3% | 7.8x | 0.8x | GP | 395,908 | 8.7% | 60.2 | 11.6x | 7.9x |
| NBFI | 2,078 | 2,118 | -40.63 | -1.92% | 23 | 204,627 | 4.5% | 1,157.7 | 6.8% | NM | 3.9x | WALTONHIL | 317,439 | 7.0% | 16.9 | 26.1x | 3.1x |
| Mutual Fund | 889 | 889 | -0.38 | -0.04% | 36 | 39,169 | 0.9% | 121.5 | 0.7% | NM | 0.8x | BATBC | 281,016 | 6.2% | 101.8 | 18.1x | 7.4x |
| General Insurance | 3,237 | 3,269 | -32.32 | -0.99% | 41 | 95,667 | 2.1% | 519.6 | 3.1% | 15.4x | 1.6x | SQURPHARMA | 188,016 | 4.1% | 162.7 | 10.2x | 1.9x |
| Life Insurance | 2,414 | 2,448 | -34.61 | -1.41% | 13 | 69,564 | 1.5% | 626.1 | 3.7% | NM | NM | ROBI | 157,138 | 3.4% | 11.3 | NM | 2.4x |
| Telecommunication | 5,011 | 4,956 | +55.36 | +1.12% | 3 | 590,034 | 12.9% | 123.1 | 0.7% | 15.7x | 4.6x | RENATA | 139,812 | 3.1% | 16.0 | 25.2x | 4.9x |
| Pharmaceutical | 3,824 | 3,830 | -6.86 | -0.18% | 32 | 718,052 | 15.7% | 1,517.5 | 8.9% | 17.7x | 2.6x | UPGDCL | 138,663 | 3.0% | 7.4 | 11.2x | 4.2x |
| Fuel & Power | 1,759 | 1,752 | +6.63 | +0.38% | 23 | 459,170 | 10.1% | 1,002.4 | 5.9% | 11.5x | 1.2x | BEXIMCO | 106,035 | 2.3% | 849.6 | 7.4x | 1.4x |
| Cement | 2,527 | 2,552 | -25.23 | -0.99% | 7 | 121,796 | 2.7% | 243.5 | 1.4% | 26.5x | 2.6x | LHBL | 84,664 | 1.9% | 210.0 | 21.7x | 4.8x |
| Services & Real Estate | 1,584 | 1,577 | +6.99 | +0.44% | 8 | 59,896 | 1.3% | 831.9 | 4.9% | 83.3x | 1.1x | BERGERPBL | 82,145 | 1.8% | 1.4 | 26.7x | 7.2x |
| Engineering | 4,618 | 4,621 | -2.34 | -0.05% | 42 | 540,767 | 11.8% | 1,819.9 | 10.7% | 20.4x | 1.9x | MARICO | 77,588 | 1.7% | 10.9 | 22.2x | 33.7x |
| Food & Allied | 21,665 | 21,553 | +112.02 | +0.52% | 21 | 384,721 | 8.4% | 1,024.5 | 6.0% | 23.1x | 8.1x | ICB | 77,439 | 1.7% | 4.3 | 43.8x | 1.7x |
| IT | 2,636 | 2,620 | +16.38 | +0.63% | 11 | 33,776 | 0.7% | 604.0 | 3.6% | 27.4x | 2.4x | BXPBARMA | 72,984 | 1.6% | 51.5 | 12.7x | 1.8x |
| Textile | 1,736 | 1,722 | +13.86 | +0.81% | 58 | 187,260 | 4.1% | 2,930.3 | 17.2% | 28.1x | 1.2x | BEACONPHAR | 60,291 | 1.3% | 19.6 | 64.4x | 10.3x |
| Paper & Printing | 11,261 | 11,115 | +146.07 | +1.31% | 6 | 41,222 | 0.9% | 793.5 | 4.7% | NM | 2.8x | BRACBANK | 57,619 | 1.3% | 92.2 | 11.3x | 1.0x |
| Tannery | 3,122 | 3,157 | -35.57 | -1.13% | 6 | 33,339 | 0.7% | 683.7 | 4.0% | 35.1x | 3.2x | ISLAMIBANK | 54,257 | 1.2% | 16.2 | 11.1x | 0.8x |
| Jute | 8,810 | 8,830 | -19.44 | -0.22% | 3 | 2,030 | 0.0% | 6.4 | 0.0% | NM | 28.7x | DUTCHBANGL | 45,015 | 1.0% | 3.3 | 7.8x | 1.2x |
| Ceramics | 755 | 762 | -6.85 | -0.90% | 5 | 33,677 | 0.7% | 253.7 | 1.5% | 31.6x | 2.0x | TITASGAS | 41,943 | 0.9% | 134.8 | 12.5x | 0.6x |
| Miscellaneous | 4,358 | 4,309 | +49.50 | +1.15% | 15 | 241,684 | 5.3% | 2,016.1 | 11.9% | 11.8x | 2.0x | POWERGRID | 38,772 | 0.9% | 129.3 | 10.6x | 0.4x |
| Bond** | 90 | 90 | +0.36 | +0.40% | 9 | 37,427 | 0.8% | 4.2 | 0.0% | NM | NM | SUMITPOWER | 37,162 | 0.8% | 13.9 | 8.9x | 1.0x |

| Top Ten Gainers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|-----------------|-------------------|-------|-------------------|-------|-------|
| GBBPOWER | 22.6 | +9.7% | 126.7 | 18.5x | 1.1x |
| SIMTEX | 23.1 | +9.5% | 211.5 | 27.1x | 1.0x |
| APEXFOODS | 233.8 | +8.7% | 66.5 | 82.0x | 1.7x |
| AMANFEED | 42.4 | +8.4% | 173.3 | 17.5x | 1.3x |
| NTC | 765.2 | +7.5% | 97.5 | NM | 14.7x |
| YPL | 23.2 | +7.4% | 97.2 | NM | 2.1x |
| BSC | 135.6 | +7.3% | 673.0 | 10.1x | 2x |
| SPCL | 73.2 | +7.0% | 60.7 | 9.8x | 1.8x |
| GOLDENSON | 20.1 | +6.3% | 151.2 | 33.0x | 1.0x |
| BBS | 26.5 | +6.0% | 313.5 | 23.8x | 1.7x |

| Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE | PB |
|----------------------------|--------------------------|----------------------------|-------|-------|
| SQURPHARMA | 123,019 | 7.1% | 10.2x | 1.9x |
| BATBC | 74,329 | 4.3% | 18.1x | 7.4x |
| BEXIMCO | 73,641 | 4.3% | 7.4x | 1.4x |
| RENATA | 68,256 | 3.9% | 25.2x | 4.9x |
| BXPBARMA | 50,957 | 2.9% | 12.7x | 1.8x |
| BEACONPHAR | 42,204 | 2.4% | 64.4x | 10.3x |
| GP | 39,591 | 2.3% | 11.6x | 7.9x |
| BRACBANK | 30,976 | 1.8% | 11.3x | 1.0x |
| LHBL | 29,903 | 1.7% | 21.7x | 4.8x |
| ISLAMIBANK | 24,372 | 1.4% | 11.1x | 0.8x |
| EBL | 24,254 | 1.4% | 7.7x | 1.1x |
| PUBALIBANK | 19,582 | 1.1% | 5.8x | 0.7x |
| NBL | 19,116 | 1.1% | NM | 0.5x |
| CITYBANK | 18,261 | 1.1% | 4.8x | 0.7x |
| OLYMPIC | 17,234 | 1.0% | 19.4x | 3.1x |
| ORIONPHARM | 16,585 | 1.0% | 25.4x | 1.3x |
| ROBI | 15,714 | 0.9% | NM | 2.4x |
| BSRMLTD | 14,994 | 0.9% | 5.2x | 0.7x |
| ALARABANK | 14,671 | 0.8% | 12.0x | 1.1x |
| IFIC | 14,406 | 0.8% | 12.5x | 0.8x |

| Most Traded Share | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|-------------------|-------------------|-------|-------------------|-------|------|
| BEXIMCO | 121.0 | +0.7% | 849.6 | 7.4x | 1.4x |
| BSC | 135.6 | +7.3% | 673.0 | 10.1x | 2.0x |
| FORTUNE | 79.6 | -2.3% | 639.8 | 26.1x | 5.3x |
| ORIONPHARM | 104.2 | -3.7% | 566.2 | 25.4x | 1.3x |
| IPDC | 70.9 | -2.6% | 534.7 | 28.8x | 4.1x |
| SONALIPAPR | 738.5 | +2.2% | 406.1 | 78.3x | 4.4x |
| DELTALIFE | 161.4 | -1.6% | 400.9 | NM | NM |
| MALEKSPIN | 40.6 | +1.2% | 381.2 | 9.4x | 0.8x |
| OLYMPIC | 142.1 | +5.8% | 352.5 | 19.4x | 3.1x |
| BBS | 26.5 | +6.0% | 313.5 | 23.8x | 1.7x |

| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|----------------|-------------------|-------|-------------------|-------|------|
| PADMALIFE | 54.4 | -6.4% | 53.4 | NM | NM |
| UTTARAFIN | 37.5 | -4.8% | 5.9 | 8.7x | 1x |
| TAKAFULINS | 58.3 | -4.3% | 9.5 | 31.5x | 3.0x |
| HAKKANIPUL | 67.5 | -4.3% | 42.7 | NM | 2.8x |
| ORIONPHARM | 104.2 | -3.7% | 566.2 | 25.4x | 1.3x |
| WATACHEM | 231.1 | -3.6% | 16.3 | 50.5x | 3.8x |
| BAYLEASING | 26.8 | -3.6% | 69.2 | 9.3x | 1.2x |
| PREMIERLEA | 8.1 | -3.6% | 7.3 | NM | 0.8x |
| MEGHNALIFE | 71.8 | -3.4% | 21.4 | NM | NM |
| PHOENIXFIN | 20.4 | -3.3% | 55.0 | 17.3x | 1.0x |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| ORIONINFU | 231.0 | 211.0 | 12.0 | 557 | 120.41 |
| IPDC | 73.0 | 72.9 | 2.0 | 1,640 | 119.58 |
| ORIONPHARM | 119.0 | 98.0 | 8.0 | 400 | 43.50 |
| TRUSTBANK | 35.0 | 35.0 | 2.0 | 1,000 | 35.00 |
| PRIMEINSUR | 82.9 | 82.8 | 6.0 | 241 | 19.96 |
| PADMALIFE | 63.9 | 63.5 | 5.0 | 309 | 19.73 |
| METROSPIN | 41.7 | 40.5 | 4.0 | 428 | 17.77 |
| SPCERAMICS | 44.8 | 44.8 | 3.0 | 100 | 4.48 |
| SONALIPAPR | 700.0 | 700.0 | 1.0 | 5 | 3.50 |
| SQURPHARMA | 213.0 | 213.0 | 1.0 | 15 | 3.20 |

*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

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| ORIONINFU | 231.0 | 211.0 | 120.4 | 557 | 12 |
| IPDC | 73.0 | 72.9 | 119.6 | 1,640 | 2 |
| ORIONPHARM | 119.0 | 98.0 | 43.5 | 400 | 8 |
| TRUSTBANK | 35.0 | 35.0 | 35.0 | 1,000 | 2 |
| PRIMEINSUR | 82.9 | 82.8 | 20.0 | 241 | 6 |
| PADMALIFE | 63.9 | 63.5 | 19.7 | 309 | 5 |
| METROSPIN | 41.7 | 40.5 | 17.8 | 428 | 4 |
| SPCERAMICS | 44.8 | 44.8 | 4.5 | 100 | 3 |
| SONALIPAPR | 700.0 | 700.0 | 3.5 | 5 | 1 |
| SQURPHARMA | 213.0 | 213.0 | 3.2 | 15 | 1 |
| BEXIMCO | 123.9 | 122.0 | 3.2 | 26 | 3 |
| BPPL | 31.0 | 31.0 | 3.1 | 100 | 1 |
| SHYAMPSUG | 103.0 | 103.0 | 2.8 | 27 | 1 |
| NTC | 725.0 | 715.0 | 2.7 | 4 | 2 |
| FEKDIL | 24.0 | 23.3 | 2.4 | 100 | 2 |
| KDSALTD | 88.9 | 88.9 | 2.3 | 26 | 1 |
| BATBC | 559.8 | 559.8 | 2.3 | 4 | 1 |
| NCCBLMF1 | 7.1 | 7.1 | 2.2 | 309 | 1 |
| SUNLIFEINS | 68.5 | 68.5 | 2.1 | 30 | 2 |
| AL-HAJTEX | 140.5 | 134.0 | 2.0 | 15 | 3 |
| MPETROLEUM | 201.7 | 201.7 | 1.9 | 10 | 1 |
| SAPORTL | 38.1 | 38.1 | 1.9 | 50 | 1 |
| Total | | | 437.8 | | 88 |

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|--|-------------|----------|--------|-------------|-----------|
| | | Stock | Cash | | |
| Sonali Life Insurance Company Limited | - | 0.0% | 13.0% | Record Date | 31-Aug-22 |
| Walton Hi-Tech Industries PLC | - | 0.0% | 250.0% | Record Date | 4-Sep-22 |
| GSP Finance Company (Bangladesh) Limited | - | 7.5% | 2.5% | Record Date | 4-Sep-22 |
| SEML Lecture Equity Management Fund | - | 0.0% | 5.0% | Record Date | 4-Sep-22 |
| Sunlife Insurance Company Limited | - | 0.0% | 0.0% | Record Date | 4-Sep-22 |
| SEML IBBL Shariah Fund | - | 0.0% | 6.0% | Record Date | 4-Sep-22 |
| SEML FBLSL Growth Fund | - | 0.0% | 15.0% | Record Date | 4-Sep-22 |
| ICB AMCL Second Mutual Fund | - | 0.0% | 6.0% | Record Date | 5-Sep-22 |
| ICB Employees Provident MF 1: Scheme 1 | - | 0.0% | 5.0% | Record Date | 5-Sep-22 |
| Prime Bank 1st ICB AMCL Mutual Fund | - | 0.0% | 5.0% | Record Date | 5-Sep-22 |
| Phoenix Finance 1st Mutual Fund | - | 0.0% | 5.0% | Record Date | 5-Sep-22 |
| ICB AMCL Third NRB Mutual Fund | - | 0.0% | 5.0% | Record Date | 5-Sep-22 |
| IFIL Islamic Mutual Fund-1 | - | 0.0% | 4.0% | Record Date | 5-Sep-22 |
| ICB AMCL Sonali Bank Limited 1st Mutual Fund | - | 0.0% | 5.0% | Record Date | 5-Sep-22 |
| ICB AMCL First Agrani Bank Mutual Fund | - | 0.0% | 9.0% | Record Date | 5-Sep-22 |
| Green Delta Mutual Fund | - | 0.0% | 7.0% | Record Date | 5-Sep-22 |
| Asian Tiger Sandhani Life Growth Fund | - | 0.0% | 5.0% | Record Date | 5-Sep-22 |

Important DSE News
MTB

Associated Builders Corporation Ltd., one of the Corporate Sponsor Directors of the Company, has further informed that it has completed its sale of 24,37,500 shares whereas Mr. Rashed Ahmed Chowdhury, one of the Nominated Directors of the company has further informed that he has completed his buying of 24,37,500 shares of the Company at prevailing market through Dhaka Stock Exchange as per declaration disseminated on 23.08.2022.

GHAIL

Refer to their earlier news disseminated by DSE on 09.03.2021 regarding decision to invest into the fast rising E-commerce sector and another news on 16.08.2021 regarding inauguration of e-commerce business, the Company has further informed that due to the unstable economic outlook of the country the Board decided it would not be prudent to move forward with the planned investment in e-commerce platform and also decided not to proceed with the investment.

CBLPBOND

The Trustee of City Bank Perpetual Bond has informed that the coupon rate of the bond in line with the approved coupon rate mechanism, which will be applicable from September 01, 2022 to February 28, 2023. Accordingly, it has been determined that the applicable "Coupon Rate" for this period will be 10.00 % per annum.

MONOSPOOL

Referring to the BSEC letter No. SEC/SRMIC/94-22/179 dated April 28, 2022, Bangladesh Development Group Ltd., one of the Corporate Directors of the Company, has expressed its intention to sell 3,81,474 shares out of its holding 13,16,949 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

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