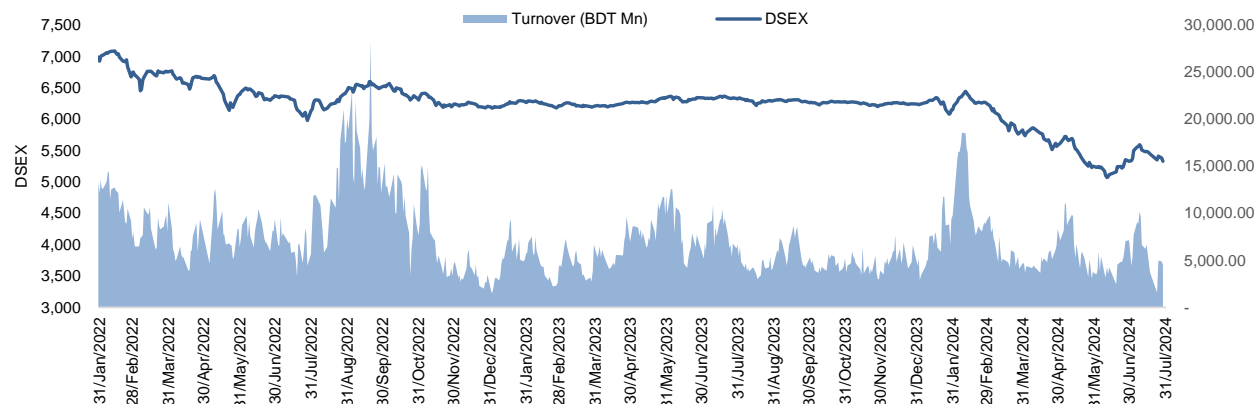


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.99%) lost 53.48 points and closed at 5,330.24. The blue-chip index DS30 (-0.96%), the Shariah-based index DSES (-0.96%), and the large-cap index CDSET (-0.56%) closed at 1,902.75, 1,166.42, and 1,026.71 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.74% followed by Telecommunication (-1.49%), NBFi (-1.28%), Fuel & Power (-1.12%), Bank (-0.89%), Pharmaceutical (-0.52%), and Food & Allied (-0.45%), respectively. Block trades contributed 3.5% of the overall market turnover. Agni Systems Ltd. (-2.9%) was the most traded share with a turnover of BDT 276 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,330.24	5,383.72	-53.48	-0.99%	-14.7%
DS30	1,902.75	1,921.26	-18.51	-0.96%	-9.1%
DSES	1,166.42	1,177.72	-11.30	-0.96%	-14.5%
CDSET	1,026.71	1,032.48	-5.77	-0.56%	-14.6%

	Advanced	Declined	Unchanged	Total
All Category	27	333	32	392
A Category (Equity)	17	197	18	232
B Category (Equity)	6	94	2	102
N Category (Equity)	1	4	0	5
Z Category (Equity)	3	38	12	53
Mutual Funds	0	27	10	37
Corporate Bonds	0	1	0	1
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,527,484	6,567,862	-0.6%
	Mn USD	55,318	55,660	
Turnover	Mn BDT	4,502	4,884	-7.8%
	Mn USD	38	41	
Volume	Mn Shares	144	185	-22.2%
No. of Trade		119,674	129,077	-7.3%

* Average Interbank Exchange Rate is BDT 118.00 as of Jul 29, 2024

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Figure: Sectorial Turnover (BDT Mn)

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

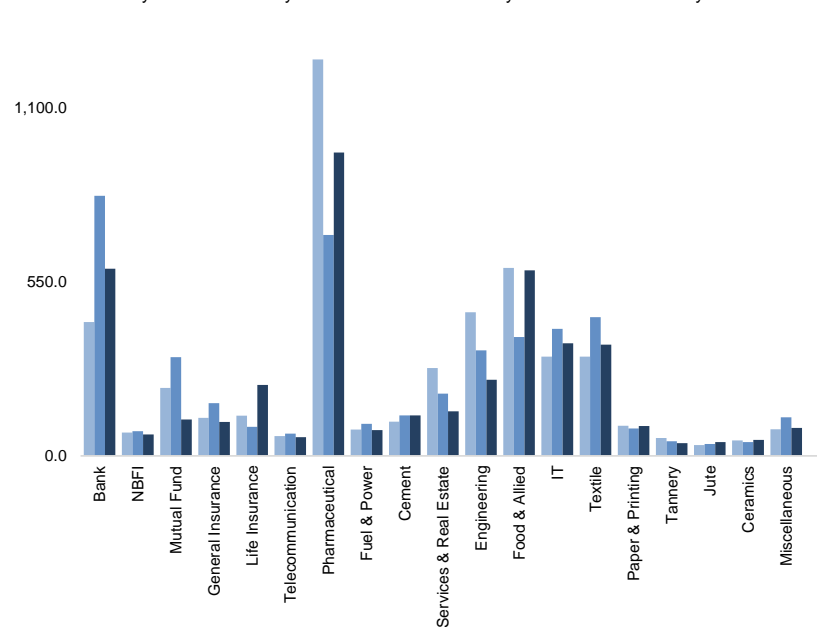
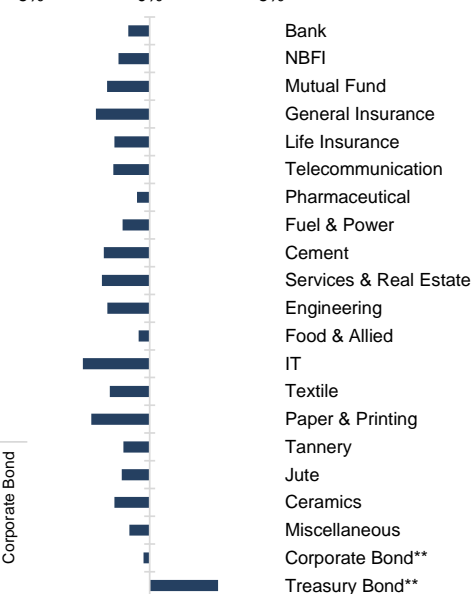


Figure: Sectorial Mcap Change

-5% 0% 5%



Market PE 14.5x

Market PB 1.2x

* 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	1,349	1,361	-12.05	-0.89%	36	646,040	9.9%	592.2	13.6%	7.3x	0.6x	GP	343,246	9.4%	27.8	9.7x	4.8x
NBFI	1,124	1,138	-14.59	-1.28%	23	108,773	1.7%	67.6	1.6%	NM	NM	SQURPHARMA	189,878	5.2%	133.4	9.4x	1.6x
Mutual Fund	646	657	-11.51	-1.75%	37	30,178	0.5%	115.3	2.7%	NM	0.6x	WALTONHIL	183,544	5.0%	18.4	14.2x	1.7x
General Insurance	3,052	3,121	-69.08	-2.21%	43	88,392	1.4%	107.5	2.5%	15.9x	1.4x	BATBC	178,632	4.9%	72.7	10.2x	3.4x
Life Insurance	1,937	1,966	-28.49	-1.45%	15	51,503	0.8%	224.5	5.2%	NM	NM	ROBI	122,568	3.4%	25.0	32.1x	1.8x
Telecommunication	4,177	4,240	-63.36	-1.49%	3	483,591	7.4%	59.0	1.4%	11.8x	3.1x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,187	3,204	-16.68	-0.52%	34	604,750	9.3%	960.1	22.1%	16.3x	1.8x	BERGERPBL	84,343	2.3%	5.8	26.0x	5.9x
Fuel & Power	1,199	1,213	-13.59	-1.12%	23	315,703	4.8%	81.7	1.9%	20.7x	0.7x	RENATA	82,949	2.3%	6.9	36.1x	2.5x
Cement	2,224	2,267	-42.74	-1.89%	7	106,232	1.6%	128.0	2.9%	17.7x	2.3x	UPGDCL	75,360	2.1%	1.5	10.1x	2.2x
Services & Real Estate	1,390	1,418	-27.83	-1.96%	9	76,864	1.2%	141.1	3.2%	24.1x	0.6x	MARICO	69,927	1.9%	7.1	15.2x	8.5x
Engineering	2,963	3,016	-52.46	-1.74%	42	342,356	5.2%	240.9	5.5%	14.4x	1.1x	LHBL	64,921	1.8%	40.8	13.6x	3.4x
Food & Allied	16,036	16,108	-72.38	-0.45%	21	294,410	4.5%	587.3	13.5%	15.7x	4.9x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
IT	2,534	2,605	-71.52	-2.75%	11	33,335	0.5%	356.1	8.2%	27.5x	2.2x	UNILEVERCL	49,572	1.4%	127.1	57.4x	19.2x
Textile	1,184	1,204	-19.81	-1.65%	58	122,881	1.9%	352.3	8.1%	NM	0.8x	BXPHARMA	48,671	1.3%	19.4	9.1x	1.0x
Paper & Printing	6,553	6,714	-161.34	-2.40%	6	30,063	0.5%	94.5	2.2%	42.2x	1.3x	ICB	47,439	1.3%	1.0	NM	1.1x
Tannery	2,363	2,388	-25.77	-1.08%	6	25,877	0.4%	40.6	0.9%	37.2x	2.5x	DUTCHBANGL	42,008	1.2%	3.7	5.2x	0.9x
Jute	16,841	17,037	-195.57	-1.15%	3	3,946	0.1%	43.8	1.0%	NM	NM	EBL	35,583	1.0%	36.9	5.4x	0.8x
Ceramics	487	494	-7.16	-1.45%	5	21,609	0.3%	50.8	1.2%	42.2x	1.3x	POWERGRID	34,633	1.0%	1.5	NM	0.2x
Miscellaneous	4,256	4,292	-35.84	-0.84%	15	231,919	3.6%	88.9	2.0%	39.2x	1.8x	BEACONPHAR	30,815	0.8%	9.5	68.4x	5.0x
Corporate Bond**	6,972	6,990	-18.02	-0.26%	16	41,791	0.6%	0.1	0.0%	NM	NM	PUBALIBANK	28,574	0.8%	1.8	3.9x	0.6x
Treasury Bond**	265	258	+7.26	+2.81%	236	2,866,856	43.9%	10.3	0.2%	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
TECHNODRUG	51.1	+9.9%	24.6	NM	1.7x	SQURPHARMA	117,112	8.6%	9.4x	1.6x	AGNISYSL	34.0	-2.9%	275.5	31.8x	2.1x
NEWLINE	49.1	+6.3%	0.1	94.4x	2.0x	BEXIMCO	69,460	5.1%	NM	1.2x	ORIONINFU	512.1	-0.1%	156.4	NM	34.3x
LIBRAINFU	920.1	+4.5%	72.6	NM	1.1x	BATBC	45,948	3.4%	10.2x	3.4x	NRBBANK	13.5	-2.9%	139.4	16.4x	1.1x
RENWICKJA	720.6	+4.4%	0.0	NM	NM	RENATA	35,002	2.6%	36.1x	2.5x	SQURPHARMA	214.2	+0.9%	133.4	9.4x	1.6x
UNITEDFIN	11.9	+4.4%	9.8	16.1x	0.7x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	GEMINISEA	321.6	+2.4%	130.9	45.6x	14.7x
RUPALILIFE	160.4	+3.6%	115.9	NM	NM	BXPHARMA	32,479	2.4%	9.1x	1.0x	UNILEVERCL	2,571.9	+0.2%	127.1	57.4x	19.2x
MEGCONMILK	31.1	+3.0%	4.4	NM	NM	BRACBANK	32,157	2.4%	7.4x	1.0x	BRACBANK	37.5	-0.5%	120.5	7.4x	1.0x
GEMINISEA	321.6	+2.4%	130.9	45.6x	14.7x	GP	30,004	2.2%	9.7x	4.8x	RUPALILIFE	160.4	+3.6%	115.9	NM	NM
SAIHAMTEX	14.5	+2.1%	4.8	19.9x	0.3x	LHBL	24,690	1.8%	13.6x	3.4x	SALVOCHEM	49.0	+0.6%	103.8	24.0x	3.0x
PHARMAID	742.8	+1.8%	60.8	45.6x	6.8x	EBL	24,199	1.8%	5.4x	0.8x	LOVELLO	93.4	-2.7%	102.4	67.7x	7.1x
						PUBALIBANK	20,448	1.5%	3.9x	0.6x						
						NBL	16,930	1.2%	NM	1.3x						
						CITYBANK	16,830	1.2%	4.2x	0.7x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	11.0x	1.1x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	14.7x	2.4x						
						UTTARABANK	11,350	0.8%	11.9x	0.8x						
						ORIONPHARM	11,317	0.8%	15.1x	0.7x						
						ROBI	10,738	0.8%	32.1x	1.8x						
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)					
EPGL	19.4	-3.0%	0.8	NM	0.5x	NBL	6.3	6.3	1.0	11,244	70.84					
PHENIXINS	29.1	-3.0%	0.6	20.8x	1x	BRACBANK	37.5	37.2	2.0	450	16.85					
HRTEX	42.1	-3.0%	3.3	NM	1.2x	AIL	110.0	106.3	5.0	115	12.43					
RANFOUNDRY	165.4	-3.0%	3.7	NM	5.0x	BEACHHATCH	85.9	85.1	3.0	85	7.21					
JANATAINS	29.2	-3.0%	0.3	23.7x	2.0x	RUPALILIFE	165.0	155.0	5.0	42	6.63					
STANDARINS	35.7	-3.0%	3.8	16.6x	1.6x	MIDLANDBNK	25.0	25.0	1.0	248	6.20					
SONARGAON	26.0	-3.0%	4.1	NM	1.4x	SONALILIFE	74.6	74.6	2.0	70	5.22					
PF1STMF	6.5	-3.0%	2.9	NM	1.1x	PREMIERCEM	70.0	70.0	3.0	50	3.50					
PHOENIXFIN	6.5	-3.0%	0.3	NM	NM	SHEPHERD	14.5	14.5	1.0	200	2.90					
AL-HAJTEX	130.3	-3.0%	12.9	NM	14.4x	EBL	26.6	26.6	2.0	105	2.79					

* 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
NBL	6.3	6.3	70.8	11,244	1
BRACBANK	37.5	37.2	16.8	450	2
AIL	110.0	106.3	12.4	115	5
BEACHHATCH	85.9	85.1	7.2	85	3
RUPALILIFE	165.0	155.0	6.6	42	5
MIDLANDBNK	25.0	25.0	6.2	248	1
SONALILIFE	74.6	74.6	5.2	70	2
PREMIERCEM	70.0	70.0	3.5	50	3
SHEPHERD	14.5	14.5	2.9	200	1
EBL	26.6	26.6	2.8	105	2
ASIATICLAB	54.6	54.4	1.9	35	3
CRYSTALINS	88.1	88.1	1.9	21	1
RELIANCE1	20.4	19.9	1.7	84	2
PRAGATILIF	140.4	140.4	1.6	12	1
REPUBLIC	41.2	41.2	1.6	38	1
AFTABAUTO	39.0	38.3	1.3	34	2
AGNISYSL	38.5	38.5	1.3	33	1
AGNISYSL	38.5	38.5	1.3	33	1
LOVELLO	105.5	103.3	1.2	11	2
OIMEX	28.5	26.9	1.1	41	2
SIMTEX	23.8	23.8	1.1	46	1
MPETROLEUM	218.5	218.5	1.1	5	1
Total			159.3		56

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BIFC		0.0%	0%	Record Date	12-Aug-24
GP		0.0%	160%	Record Date	13-Aug-24
BERGERPBL		0.0%	500%	Record Date	18-Aug-24

Important DSE News

CONTININS

(Q2 Un-audited): EPS was Tk. 0.45 for April-June 2024 as against Tk. 0.52 for April-June 2023; EPS was Tk. 0.95 for January-June 2024 as against Tk. 1.08 for January-June 2023. NOCFPS was Tk. 0.13 for January-June 2024 as against Tk. 0.18 for January-June 2023. NAV per share was Tk. 23.04 as on June 30, 2024 and Tk. 21.45 as on June 30, 2023.

MTB

(Q2 Un-audited): Consolidated EPS was Tk. 0.38 for April-June 2024 as against Tk. 0.40 (restated) for April-June 2023; Consolidated EPS was Tk. 1.16 for January-June 2024 as against Tk. 1.10 (restated) for January-June 2023. Consolidated NOCFPS was Tk. 21.91 for January-June 2024 as against Tk. 13.22 (restated) for January-June 2023. Consolidated NAV per share was Tk. 25.25 as on June 30, 2024 and Tk. 24.52 (restated) as on December 31, 2023.

CRYSTALINS

(Q2 Un-audited): EPS was Tk. 0.86 for April-June 2024 as against Tk. 0.80 (restated) for April-June 2023; EPS was Tk. 1.69 for January-June 2024 as against Tk. 1.62 (restated) for January-June 2023; NOCFPS was Tk. 0.30 for January-June 2024 as against Tk. 0.83 (restated) for January-June 2023. NAV per share was Tk. 24.09 as on June 30, 2024 and Tk. 23.51 (restated) as on December 31, 2023.

STANDARINS

(Q2 Un-audited): EPS was Tk. 0.68 for April-June 2024 as against Tk. 0.66 for April-June 2023; EPS was Tk. 1.33 for January-June 2024 as against Tk. 1.31 for January-June 2023; NOCFPS was Tk. 1.09 for January-June 2024 as against Tk. 0.05 for January-June 2023. NAV per share was Tk. 21.83 as on June 30, 2024 and Tk. 20.89 as on December 31, 2023.

NRBCBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.291 for April-June 2024 as against Tk. (0.468) for April-June 2023; Consolidated EPS was Tk. 0.733 for January-June 2024 as against Tk. 0.511 for January-June 2023. Consolidated NOCFPS was Tk. 12.524 for January-June 2024 as against Tk. 8.754 for January-June 2023. Consolidated NAV per share was Tk. 17.21 as on June 30, 2024 and Tk. 17.58 as on December 31, 2023.

DBH

(Q2 Un-audited): EPS was Tk. 1.19 for April-June 2024 as against Tk. 1.15 for April-June 2023; EPS was Tk. 2.05 for January-June 2024 as against Tk. 2.46 for January-June 2023. NOCFPS was Tk. (3.66) for January-June 2024 as against Tk. 26.93 for January-June 2023. NAV per share was Tk. 44.19 as on June 30, 2024 and Tk. 43.63 as on December 31, 2023.

FUWANGFOOD

The company has informed that the Board of Directors has appointed Mr. Mohammad Zaman, ACS, LL.M as Company Secretary of the company with effect from July 24, 2024.

MAKSONSPIN

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Maksons Spinning Mills PLC' instead of 'Maksons Spinning Mills Limited' with effect from July 30, 2024. Other things (except name) will remain unchanged.

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