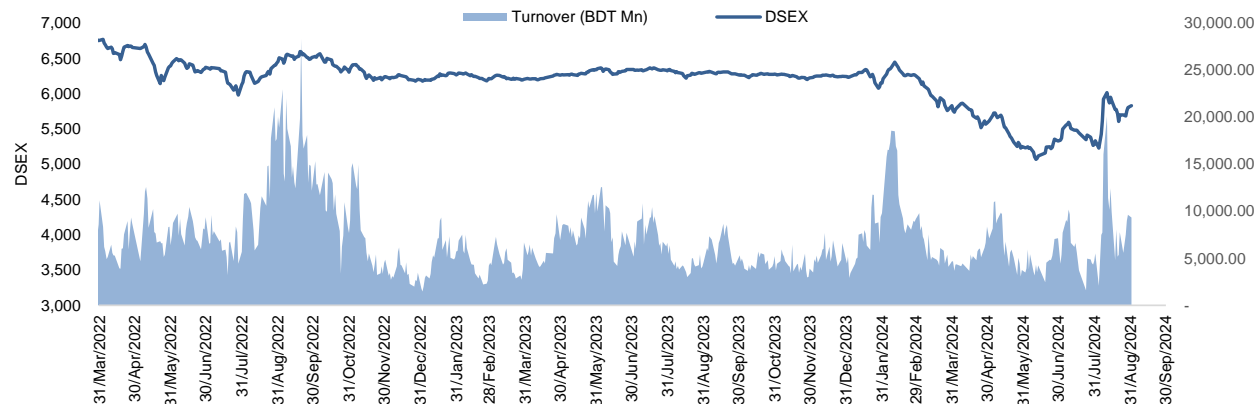


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.43%) gained 24.95 points and closed at 5,829.37. The blue-chip index DS30 (+0.19%), the Shariah-based index DSES (+0.35%), and the large-cap index CDSET (-0.10%) closed at 2,128.84, 1,245.55, and 1,144.00 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 6.23% followed by Food & Allied (+1.23%), Engineering (+0.85%), Fuel & Power (+0.41%), Pharmaceutical (+0.32%), Telecommunication (-0.41%), and Bank (-0.86%), respectively. Block trades contributed 3.1% of the overall market turnover. British American Tobacco Bangladesh Company Limited (+0.9%) was the most traded share with a turnover of BDT 863 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,829.37	5,804.42	+24.95	+0.43%	-6.7%
DS30	2,128.84	2,124.71	+4.13	+0.19%	+1.7%
DSES	1,245.55	1,241.26	+4.29	+0.35%	-8.7%
CDSET	1,144.00	1,145.15	-1.15	-0.10%	-4.9%

	Advanced	Declined	Unchanged	Total
All Category	255	100	35	390
A Category (Equity)	149	59	21	229
B Category (Equity)	73	19	9	101
N Category (Equity)	4	1	0	5
Z Category (Equity)	29	21	5	55
Mutual Funds	6	12	11	29
Corporate Bonds	1	2	0	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,016,736	6,995,815	+0.3%
	Mn USD	58,473	58,298	
Turnover	Mn BDT	9,336	9,633	-3.1%
	Mn USD	78	80	
Volume	Mn Shares	250	258	-3.2%
No. of Trade		216,809	207,405	+4.5%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 01, 2024

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Figure: Sectorial Turnover (BDT Mn)

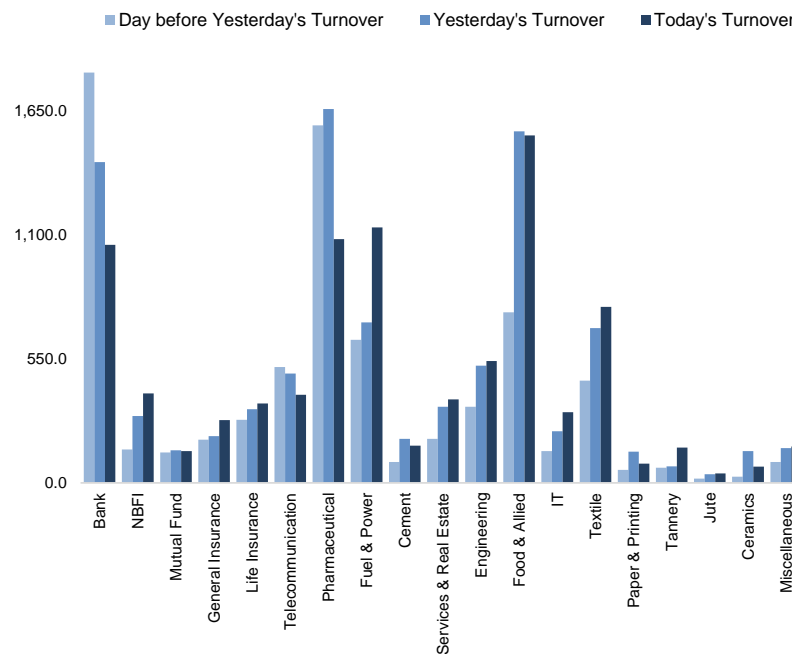
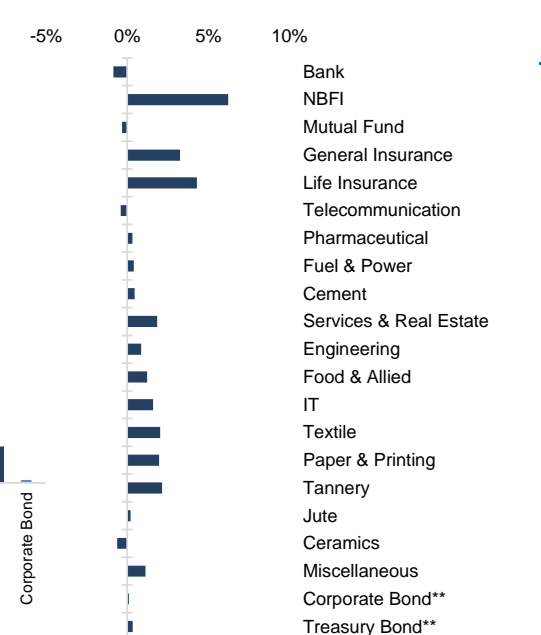


Figure: Sectorial Mcap Change



Market PE 16.2x

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	1,554	1,567	-13.47	-0.86%	36	744,286	10.6%	1,054.1	11.7%	8.1x	0.7x	GP	463,288	11.2%	216.2	13.1x	6.5x
NBFI	1,492	1,405	+87.45	+6.23%	23	144,447	2.1%	396.0	4.4%	NM	NM	BATBC	228,690	5.5%	862.8	13.0x	4.0x
Mutual Fund	706	708	-2.26	-0.32%	37	32,960	0.5%	140.3	1.6%	NM	0.6x	WALTONHIL	211,989	5.1%	34.9	16.4x	1.9x
General Insurance	3,229	3,127	+101.97	+3.26%	43	93,542	1.3%	278.7	3.1%	17.0x	1.4x	SQURPHARMA	204,327	4.9%	144.3	10.1x	1.7x
Life Insurance	2,434	2,334	+100.30	+4.30%	15	64,709	0.9%	351.5	3.9%	NM	NM	ROBI	159,233	3.9%	128.9	34.2x	2.5x
Telecommunication	5,578	5,601	-22.72	-0.41%	3	645,822	9.2%	390.6	4.3%	15.4x	4.3x	BEXIMCO	103,842	2.5%	0.1	NM	1.2x
Pharmaceutical	3,215	3,204	+10.40	+0.32%	34	609,932	8.7%	1,080.1	11.9%	16.3x	1.8x	BRACBANK	94,857	2.3%	200.8	9.7x	1.3x
Fuel & Power	1,326	1,321	+5.46	+0.41%	23	349,108	5.0%	1,131.5	12.5%	22.9x	0.8x	RENATA	88,202	2.1%	16.1	38.4x	2.7x
Cement	2,558	2,546	+11.84	+0.46%	7	122,150	1.7%	165.2	1.8%	20.6x	2.7x	UPGDCL	83,998	2.0%	7.5	11.2x	2.5x
Services & Real Estate	1,371	1,346	+24.93	+1.85%	9	75,803	1.1%	370.0	4.1%	23.7x	0.5x	BERGERPBL	82,849	2.0%	0.8	25.6x	5.4x
Engineering	3,344	3,316	+28.27	+0.85%	42	386,328	5.5%	539.4	6.0%	16.3x	1.2x	MARICO	73,112	1.8%	10.2	14.6x	7.4x
Food & Allied	19,960	19,717	+242.36	+1.23%	21	366,452	5.2%	1,539.0	17.0%	19.3x	5.7x	ISLAMIBANK	66,010	1.6%	47.6	10.1x	0.9x
IT	2,602	2,561	+41.08	+1.60%	11	34,230	0.5%	312.7	3.5%	28.2x	2.2x	ICB	64,090	1.5%	49.6	NM	1.5x
Textile	1,348	1,321	+26.91	+2.04%	58	139,827	2.0%	779.6	8.6%	NM	0.9x	UNILEVERCL	57,324	1.4%	7.9	64.6x	26.2x
Paper & Printing	5,615	5,507	+108.15	+1.96%	6	25,763	0.4%	85.3	0.9%	40.2x	1.1x	DUTCHBANGL	47,368	1.1%	15.9	6.2x	1.0x
Tannery	2,388	2,338	+50.25	+2.15%	6	26,153	0.4%	156.1	1.7%	45.1x	2.5x	OLYMPIC	41,427	1.0%	378.8	24.8x	4.0x
Jute	15,280	15,250	+30.17	+0.20%	3	3,581	0.1%	41.3	0.5%	NM	NM	POWERGRID	39,751	1.0%	4.6	NM	0.3x
Ceramics	493	496	-3.05	-0.61%	5	21,892	0.3%	72.0	0.8%	58.4x	1.3x	EBL	36,534	0.9%	23.0	5.3x	0.9x
Miscellaneous	4,221	4,175	+46.85	+1.12%	15	230,018	3.3%	161.6	1.8%	38.9x	1.8x	BXPHARMA	34,172	0.8%	64.7	6.4x	0.7x
Corporate Bond**	6,965	6,958	+7.01	+0.10%	16	34,746	0.5%	0.7	0.0%	NM	NM	MJLBD	32,245	0.8%	635.2	10.4x	2.2x
Treasury Bond**	335	334	+1.14	+0.34%	235	2,864,499	40.8%	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
APOLOISPAT	5.5	+10.0%	6.1	NM	0.3x	SQURPHARMA	117,112	8.6%	10.1x	1.7x	BATBC	423.5	+0.9%	862.8	13.0x	4.0x
CRYSTALINS	70.8	+9.9%	14.2	24.6x	2.9x	BEXIMCO	69,460	5.1%	NM	1.2x	MJLBD	101.8	-0.6%	635.2	10.4x	2.2x
NATLIFEINS	151.6	+9.9%	39.1	NM	NM	BATBC	45,948	3.4%	13.0x	4.0x	OLYMPIC	207.2	+3.0%	378.8	24.8x	4.0x
KPPL	15.5	+9.9%	14.2	NM	NM	RENATA	35,002	2.6%	38.4x	2.7x	GP	343.1	-0.3%	216.2	13.1x	6.5x
ASIATICLAB	39.9	+9.9%	95.5	NM	0.8x	ISLAMIBANK	33,649	2.5%	10.1x	0.9x	SPCL	60.3	+2.2%	210.5	12.4x	1.5x
GHCL	31.1	+9.9%	13.7	NM	0.7x	BXPHARMA	32,479	2.4%	6.4x	0.7x	BRACBANK	53.6	-	200.8	9.7x	1.3x
UNIONCAP	8.9	+9.9%	3.6	NM	NM	BRACBANK	32,157	2.4%	9.7x	1.3x	AGNISYSL	33.2	-0.6%	152.5	31.0x	2.0x
TECHNODRUG	50.2	+9.8%	122.9	NM	1.7x	GP	30,004	2.2%	13.1x	6.5x	SQURPHARMA	230.5	-1.3%	144.3	10.1x	1.7x
FORTUNE	31.4	+9.8%	127.5	31.0x	2.2x	LHBL	24,690	1.8%	16.4x	4.1x	BESTHLDNG	26.1	+2.8%	138.5	20.1x	0.4x
LOVELLO	84.2	+9.8%	76.9	61.0x	6.4x	EBL	24,199	1.8%	5.3x	0.9x	LANKABAFIN	23.5	+7.8%	133.3	40.5x	1.2x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.8x						
						CITYBANK	16,830	1.2%	4.8x	0.8x						
						BSRMLTD	14,210	1.0%	4.7x	0.6x						
						ALARABANK	13,534	1.0%	10.6x	1.1x						
						PRIMEBANK	12,985	1.0%	4.9x	0.8x						
						OLYMPIC	12,616	0.9%	24.8x	4.0x						
						UTTARABANK	11,350	0.8%	11.9x	0.8x						
						ORIONPHARM	11,317	0.8%	11.5x	0.5x						
						ROBI	10,738	0.8%	34.2x	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)
KPCL	21.6	-10.0%	1.0	65.5x	1.2x						LOVELLO	78.0	69.8	8.0	890	68.46
NEWLINE	41.0	-9.7%	0.4	78.8x	2x						BRACBANK	58.0	52.2	5.0	848	45.81
MITHUNKNIT	18.0	-9.1%	4.5	NM	5.7x						AIL	105.2	95.0	4.0	282	27.24
SPCERAMICS	19.9	-7.0%	41.5	90.5x	0.6x						NTC	260.0	260.0	1.0	81	21.05
BIFC	7.6	-6.2%	0.2	NM	NM						PRAGATILIF	198.5	198.0	7.0	90	17.83
SIBL	10.6	-5.4%	15.7	5.5x	0.5x						EIL	48.6	48.6	3.0	329	15.99
UCB	12.8	-5.2%	47.1	4.9x	0.4x						MIDLANDBNK	26.5	26.0	5.0	600	15.66
UNIONBANK	6.8	-4.2%	11.7	4.1x	0.4x						BEACHHATCH	85.0	85.0	2.0	134	11.39
DESCO	28.2	-4.1%	1.4	NM	0.6x						RUPALILIFE	132.0	130.0	3.0	75	9.80
FIRSTSBANK	7.3	-3.9%	23.2	3.0x	0.3x						AL-HAJTEX	128.0	117.0	4.0	62	7.86

* 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
LOVELLO	78.0	69.8	68.5	890	8
BRACBANK	58.0	52.2	45.8	848	5
AIL	105.2	95.0	27.2	282	4
NTC	260.0	260.0	21.0	81	1
PRAGATILIF	198.5	198.0	17.8	90	7
EIL	48.6	48.6	16.0	329	3
MIDLANDBNK	26.5	26.0	15.7	600	5
BEACHHATCH	85.0	85.0	11.4	134	2
RUPALILIFE	132.0	130.0	9.8	75	3
AL-HAJTEX	128.0	117.0	7.9	62	4
CITYBANK	24.9	24.9	5.0	200	1
BEXIMCO	104.1	104.1	4.0	39	4
DGIC	30.5	29.0	3.9	129	3
KBPPWBIL	102.0	95.0	3.8	39	5
AGNISYSL	30.1	30.1	3.5	117	2
CRYSTALINS	65.0	65.0	3.3	50	1
MJLBD	106.0	106.0	2.5	24	1
MJLBD	106.0	106.0	2.5	24	1
IFIC	10.1	10.1	2.4	239	1
DESCO	32.3	32.3	2.3	72	1
BESTHLDNG	24.7	24.7	1.7	68	1
PRIMELIFE	41.0	41.0	1.6	39	1
Total			290.6		79

Important DSE News

SIBL

The company has informed that Bangladesh Bank has reconstituted the Board of Directors of the company vide their letter dated August 25, 2024. The list containing name & identity and position of the new Board of Directors as per the Bangladesh Bank's letter is as follows: 01. Major (Retd.) Dr. Md. Rezaul Haque, Director (Sponsor Shareholder, Social Islami Bank PLC.), 02. Ms. Maksuda Begum, Independent Director (Former Executive Director, Bangladesh Bank), 03. Dr. M. Sadiqui Islam, PHD, FCMA, Independent Director (Professor, Department of Finance, University of Dhaka), 4. Mr. Md. Morshed Alam Khondoker, Independent Director (Former Deputy Managing Director, Rupali Bank PLC.), and 5. Mr. Md. Anwar Hossain, FCA, Independent Director (Chartered Accountant).

EXIMBANK

The company has informed that Bangladesh Bank, on August 29, 2024, dissolved the previous Board of the Bank and reconstructed the Board comprising of five Directors including two new Independent Directors. This reconstructed Board unanimously elected Mr. Md. Nazrul Islam Swapan, Director as the Chairman of the Board of Directors. The list of Directors of the company is as under: 1. Mr. Md. Nazrul Islam Swapan, Chairman, 2. Mr. Md. Nurul Amin, Director, 3. Mr. Anjan Kuman Saha, Director, 4. Mr. S M Rezaul Karim, Independent Director and 5. Mr. Khandaker Mamun, FCA, Independent Director.

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
DELTALIFE		0.0%	30%	Record Date	5-Sep-24
SONARBAINS		0.0%	10%	Record Date	11-Sep-24
RUPALILIFE		0.0%	12%	Record Date	26-Sep-24
GLOBALINS		0.0%	10%	Record Date	1-Oct-24
PRIMELIFE		0.0%	1%	Record Date	9-Oct-24

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