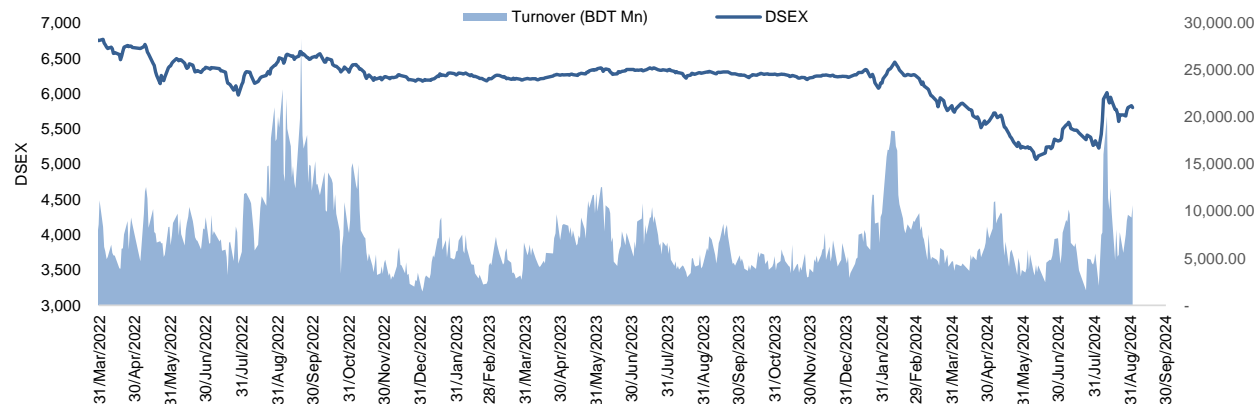


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.44%) lost 25.66 points and closed at 5,803.71. The blue-chip index DS30 (+0.25%), the Shariah-based index DSES (-0.73%), and the large-cap index CDSET (+0.11%) closed at 2,134.11, 1,236.48, and 1,145.25 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.76% followed by Telecommunication (-0.52%), Pharmaceutical (-0.46%), Engineering (-0.44%), Fuel & Power (-0.21%), Food & Allied (+0.07%), and Bank (+0.77%), respectively. Block trades contributed 3.5% of the overall market turnover. BRAC Bank Ltd. (+7.3%) was the most traded share with a turnover of BDT 853 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,803.71	5,829.37	-25.66	-0.44%	-7.1%
DS30	2,134.11	2,128.84	+5.27	+0.25%	+1.9%
DSES	1,236.48	1,245.55	-9.08	-0.73%	-9.4%
CDSET	1,145.25	1,144.00	+1.25	+0.11%	-4.8%

	Advanced	Declined	Unchanged	Total
All Category	80	291	26	397
A Category (Equity)	51	172	14	237
B Category (Equity)	16	77	8	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	13	38	4	55
Mutual Funds	1	35	1	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	6,986,454	7,016,736	-0.4%
	Mn USD	58,220	58,473	
Turnover	Mn BDT	10,655	9,336	+14.1%
	Mn USD	89	78	
Volume	Mn Shares	286	250	+14.3%
No. of Trade		233,467	216,809	+7.7%

\* Average Interbank Exchange Rate is BDT 120.00 as of Sep 02, 2024

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Figure: Sectorial Turnover (BDT Mn)

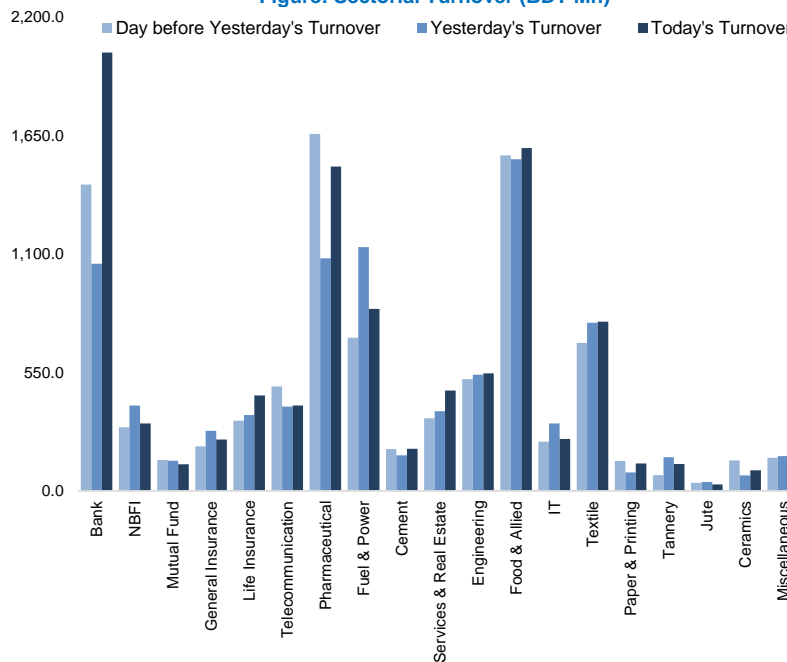
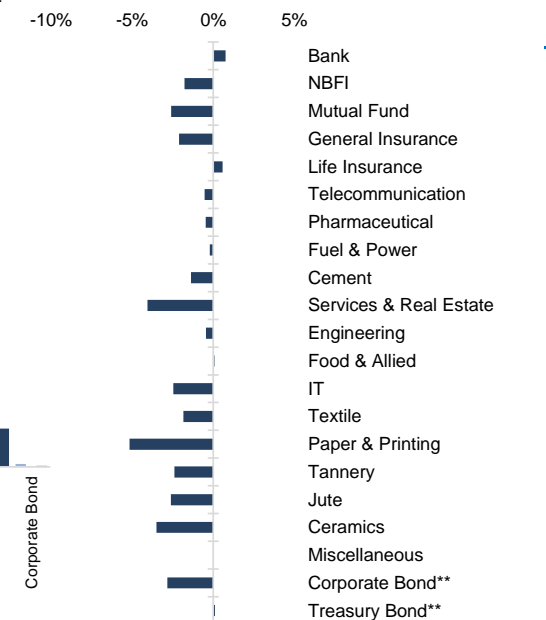


Figure: Sectorial Mcap Change



Market PE 16.1x  
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	1,566	1,554	+11.89	+0.77%	36	749,982	10.7%	2,033.9	19.8%	8.1x	0.7x	GP	463,018	11.2%	251.6	13.1x	6.4x
NBFI	1,466	1,492	-26.32	-1.76%	23	141,899	2.0%	313.4	3.0%	NM	NM	BATBC	229,770	5.6%	548.7	13.0x	4.0x
Mutual Fund	687	706	-18.29	-2.59%	37	32,105	0.5%	123.2	1.2%	NM	0.6x	WALTONHIL	213,807	5.2%	61.2	16.5x	2.0x
General Insurance	3,162	3,229	-67.84	-2.10%	43	91,577	1.3%	238.3	2.3%	16.6x	1.4x	SQURPHARMA	204,150	5.0%	131.1	10.1x	1.7x
Life Insurance	2,448	2,434	+14.20	+0.58%	15	65,087	0.9%	443.5	4.3%	NM	NM	ROBI	155,567	3.8%	95.0	33.4x	2.4x
Telecommunication	5,549	5,578	-29.16	-0.52%	3	642,446	9.2%	396.6	3.9%	15.3x	4.3x	BEXIMCO	103,842	2.5%	3.4	NM	1.2x
Pharmaceutical	3,200	3,215	-14.63	-0.46%	34	607,155	8.7%	1,505.0	14.6%	16.2x	1.8x	BRACBANK	101,758	2.5%	852.7	10.4x	1.4x
Fuel & Power	1,323	1,326	-2.74	-0.21%	23	348,388	5.0%	844.3	8.2%	22.9x	0.8x	RENATA	88,339	2.1%	358.7	38.5x	2.7x
Cement	2,523	2,558	-35.18	-1.38%	7	120,470	1.7%	195.5	1.9%	20.3x	2.7x	BERGERPBL	82,817	2.0%	2.5	25.6x	5.4x
Services & Real Estate	1,315	1,371	-55.65	-4.06%	9	72,727	1.0%	465.9	4.5%	22.8x	0.5x	UPGDCL	82,723	2.0%	6.0	11.0x	2.4x
Engineering	3,329	3,344	-14.73	-0.44%	42	384,626	5.5%	545.3	5.3%	16.2x	1.2x	MARICO	74,412	1.8%	13.2	14.9x	7.5x
Food & Allied	19,974	19,960	+13.96	+0.07%	21	366,708	5.2%	1,590.4	15.5%	19.3x	5.7x	ISLAMIBANK	66,654	1.6%	34.9	10.2x	0.9x
IT	2,538	2,602	-64.23	-2.47%	11	33,385	0.5%	240.5	2.3%	27.5x	2.2x	ICB	63,830	1.6%	19.7	NM	1.5x
Textile	1,323	1,348	-24.82	-1.84%	58	137,253	2.0%	784.8	7.6%	NM	0.9x	UNILEVERCL	57,742	1.4%	219.2	65.1x	26.4x
Paper & Printing	5,325	5,615	-290.09	-5.17%	6	24,432	0.3%	127.2	1.2%	38.1x	1.1x	DUTCHBANGL	47,720	1.2%	25.4	6.2x	1.0x
Tannery	2,331	2,388	-57.30	-2.40%	6	25,525	0.4%	125.1	1.2%	44.0x	2.4x	OLYMPIC	40,268	1.0%	503.1	24.1x	3.9x
Jute	14,881	15,280	-399.12	-2.61%	3	3,487	0.0%	30.4	0.3%	NM	NM	POWERGRID	39,568	1.0%	8.2	NM	0.2x
Ceramics	476	493	-17.26	-3.50%	5	21,126	0.3%	95.5	0.9%	56.3x	1.3x	EBL	36,534	0.9%	30.1	5.3x	0.9x
Miscellaneous	4,221	4,221	-0.70	-0.02%	15	229,980	3.3%	177.1	1.7%	38.9x	1.8x	BXPHARMA	33,057	0.8%	62.2	6.2x	0.7x
Corporate Bond**	6,769	6,965	-196.64	-2.82%	16	33,458	0.5%	5.2	0.1%	NM	NM	MJLBD	33,006	0.8%	380.1	10.6x	2.3x
Treasury Bond**	336	335	+0.35	+0.11%	235	2,854,147	40.9%	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
BDLAMPS	139.0	+9.7%	16.3	NM	2.3x	SQURPHARMA	117,112	8.6%	10.1x	1.7x	BRACBANK	57.5	+7.3%	852.7	10.4x	1.4x
AMBEEPHA	932.8	+7.5%	27.8	NM	91.2x	BEXIMCO	69,460	5.1%	NM	1.2x	BATBC	425.5	+0.5%	548.7	13.0x	4.0x
LIBRAINFU	812.4	+7.5%	25.4	NM	1.0x	BATBC	45,948	3.4%	13.0x	4.0x	OLYMPIC	201.4	-2.8%	503.1	24.1x	3.9x
BRACBANK	57.5	+7.3%	852.7	10.4x	1.4x	RENATA	35,002	2.6%	38.5x	2.7x	MJLBD	104.2	+2.4%	380.1	10.6x	2.3x
ESQUIRENIT	25.1	+6.8%	23.4	NM	0.4x	ISLAMIBANK	33,649	2.5%	10.2x	0.9x	RENATA	770.2	+0.2%	358.7	38.5x	2.7x
PREMIERLEA	4.9	+6.5%	0.4	NM	NM	BXPHARMA	32,479	2.4%	6.2x	0.7x	GP	342.9	-0.1%	251.6	13.1x	6.4x
LINDEBD	1,305.7	+6.2%	66.1	34.7x	3x	BRACBANK	32,157	2.4%	10.4x	1.4x	UNILEVERCL	2,995.8	+0.7%	219.2	65.1x	26.4x
GHAILE	15.0	+5.6%	44.9	NM	1.1x	GP	30,004	2.2%	13.1x	6.4x	SEAPEARL	56.7	-	169.7	19.0x	2.9x
DELTALIFE	109.2	+5.4%	116.2	NM	NM	LHBL	24,690	1.8%	16.2x	4.0x	PRIMEBANK	23.6	-3.7%	159.2	4.7x	0.7x
BIFC	8.0	+5.3%	0.1	NM	NM	EBL	24,199	1.8%	5.3x	0.9x	IFIC	10.2	-	143.8	7.7x	0.5x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.8x						
						CITYBANK	16,830	1.2%	4.9x	0.8x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	10.5x	1.1x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	24.1x	3.9x						
						UTTARABANK	11,350	0.8%	11.3x	0.8x						
						ORIONPHARM	11,317	0.8%	11.1x	0.5x						
						ROBI	10,738	0.8%	33.4x	2.4x						
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)					
SONALIPAPR	161.9	-10.0%	92.6	NM	1.0x	TAMJTEX	128.1	128.1	1.0	480	61.49					
YPL	14.2	-9.6%	12.5	NM	3x	PRAGATILIF	219.9	189.0	15.0	308	60.02					
ACMEPL	17.6	-9.3%	47.9	NM	1.0x	RUPALILIFE	132.0	130.0	6.0	280	36.66					
KPCL	19.6	-9.3%	110.2	59.4x	1.1x	SQURPHARMA	230.0	230.0	2.0	134	30.82					
SPCERAMICS	18.1	-9.0%	55.7	82.3x	0.6x	LOVELLO	89.5	78.0	5.0	324	25.91					
COPPERTECH	24.1	-8.7%	20.8	56.0x	1.8x	IFIC	10.2	9.9	2.0	2,542	25.25					
DBH1STMF	5.3	-8.6%	2.4	NM	0.6x	1STPRIMFMF	45.2	43.0	22.0	463	20.31					
FORTUNE	28.8	-8.3%	107.5	28.4x	2.0x	NTC	260.0	260.0	1.0	64	16.64					
EMERALDOIL	33.2	-8.0%	39.6	25.6x	NM	BEACHHATCH	83.5	83.5	3.0	165	13.78					
AIL	93.4	-7.7%	70.7	37.8x	3.9x	NEWLINE	40.0	40.0	2.0	340	13.60					

\* 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
TAMIJTEX	128.1	128.1	61.5	480	1
PRAGATILIF	219.9	189.0	60.0	308	15
RUPALILIFE	132.0	130.0	36.7	280	6
SQURPHARMA	230.0	230.0	30.8	134	2
LOVELLO	89.5	78.0	25.9	324	5
IFIC	10.2	9.9	25.2	2,542	2
1STPRIMFMF	45.2	43.0	20.3	463	22
NTC	260.0	260.0	16.6	64	1
BEACHHATCH	83.5	83.5	13.8	165	3
NEWLINE	40.0	40.0	13.6	340	2
GP	369.1	369.1	12.9	35	1
SINGERBD	149.0	149.0	9.4	63	2
BRACBANK	56.6	54.2	5.9	107	6
SEAPEARL	62.3	56.0	4.7	79	2
KBPPWBIL	105.0	101.0	4.4	43	5
DOMINAGE	14.2	14.2	4.3	300	1
GLDNJMF	11.7	11.7	3.0	260	2
GLDNJMF	11.7	11.7	3.0	260	2
SHEPHERD	14.8	14.8	2.3	158	1
CONFIDCEM	78.4	78.4	2.1	26	2
NRBBANK	12.4	12.4	1.6	130	2
TECHNODRUG	51.5	51.5	1.4	28	2
<b>Total</b>			<b>374.3</b>		<b>108</b>

**Important DSE News**
**RENATA**

The company has informed that it has achieved successful approval of Cabergoline 0.5 mg tablets under the EU Decentralized Procedure (DCP). This approval comes with access to several European markets such as Ireland, France, Portugal, Italy, Denmark, Sweden, Netherlands, Norway, and Spain. Cabergoline, a dopamine agonist, is primarily used in the treatment of conditions such as hyperprolactinemia and Parkinson's disease. Cabergoline 0.5 mg will be manufactured at Renata's state-of-the-art UK MHRA approved potent facility, which adheres to stringent quality control measures and is equipped to meet the demands of the European market. This product will be distributed across Europe through various of strategic partnerships, ensuring widespread patient access. Furthermore, this product, qualified for global markets, is available in the local market of Bangladesh under the name Cabolin, ensuring that patients have access to the same high-quality treatment options across the board.

**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
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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