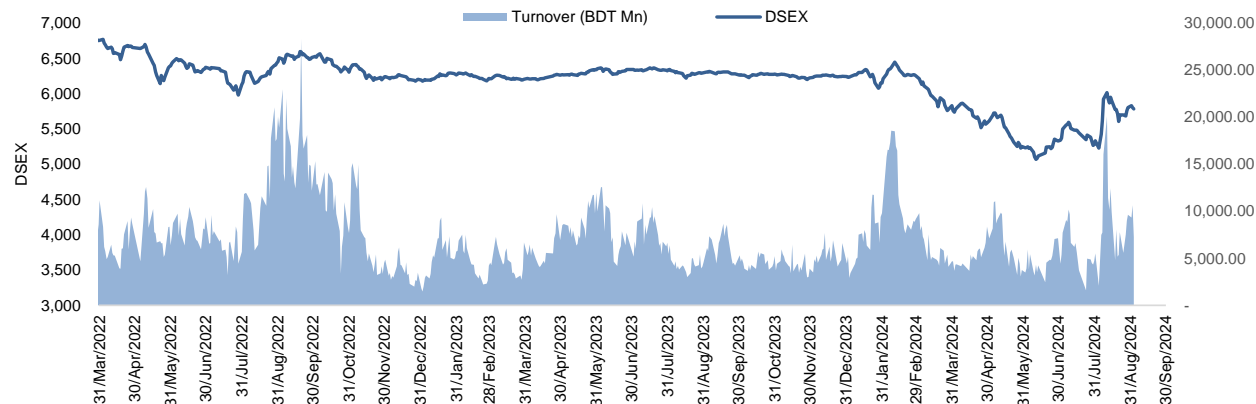


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.30%) lost 17.19 points and closed at 5,786.52. The blue-chip index DS30 (-0.05%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (-0.16%) closed at 2,133.10, 1,237.48, and 1,143.38 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 1.85%, followed by Pharmaceutical (+0.50%), Telecommunication (+0.37%), NBF1 (-0.49%), Bank (-0.60%), Fuel & Power (-0.66%), and Food & Allied (-0.96%), respectively. Block trades contributed 4.0% of the overall market turnover. BRAC Bank Ltd. (-1.4%) was the most traded share with a turnover of BDT 342 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,786.52	5,803.71	-17.19	-0.30%	-7.4%
DS30	2,133.10	2,134.11	-1.02	-0.05%	+1.9%
DSES	1,237.48	1,236.48	+1.00	+0.08%	-9.3%
CDSET	1,143.38	1,145.25	-1.87	-0.16%	-4.9%

	Advanced	Declined	Unchanged	Total
All Category	102	258	38	398
A Category (Equity)	66	152	21	239
B Category (Equity)	23	70	8	101
N Category (Equity)	0	4	0	4
Z Category (Equity)	13	32	9	54
Mutual Funds	8	13	16	37
Corporate Bonds	1	3	0	4
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,987,362	6,986,454	+0.0%
	Mn USD	58,228	58,220	
Turnover	Mn BDT	7,265	10,655	-31.8%
	Mn USD	61	89	
Volume	Mn Shares	198	286	-30.7%
No. of Trade		197,380	233,467	-15.5%

\* Average Interbank Exchange Rate is BDT 120.00 as of Sep 03, 2024

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Figure: Sectorial Turnover (BDT Mn)

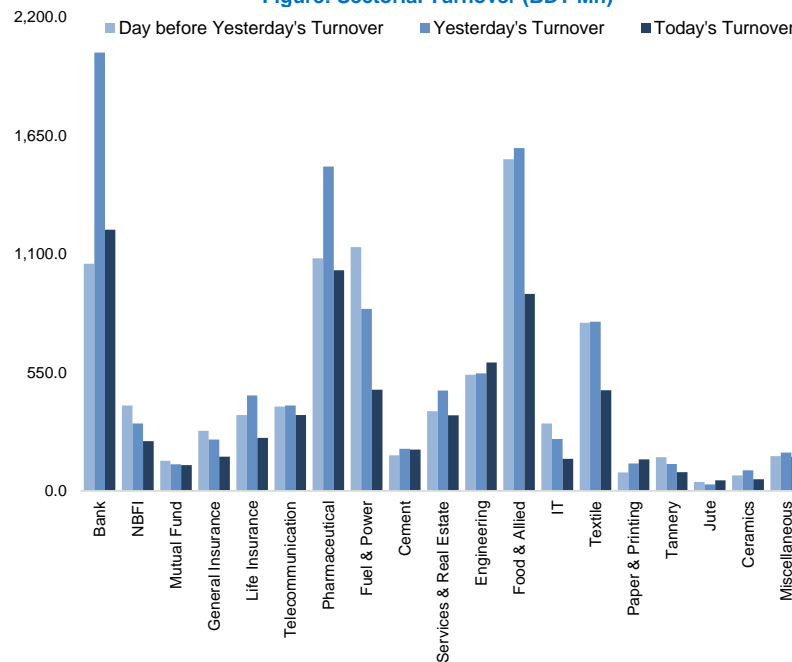
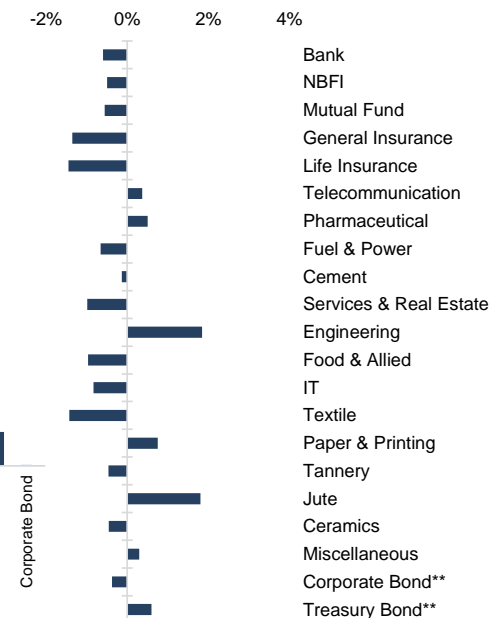


Figure: Sectorial Mcap Change



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	1,556	1,566	-9.35	-0.60%	36	745,504	10.7%	1,212.2	17.4%	8.1x	0.7x	GP	463,693	11.3%	214.5	13.1x	6.5x
NBFI	1,459	1,466	-7.21	-0.49%	23	141,201	2.0%	230.6	3.3%	NM	NM	BATBC	226,044	5.5%	127.3	12.8x	3.9x
Mutual Fund	683	687	-3.83	-0.56%	37	31,926	0.5%	119.5	1.7%	NM	0.6x	WALTONHIL	220,865	5.4%	58.5	17.1x	2.0x
General Insurance	3,119	3,162	-42.87	-1.36%	43	90,335	1.3%	158.9	2.3%	16.4x	1.4x	SQRPHARMA	204,593	5.0%	97.6	10.1x	1.7x
Life Insurance	2,413	2,448	-35.41	-1.45%	15	64,146	0.9%	245.3	3.5%	NM	NM	ROBI	157,138	3.8%	105.6	33.7x	2.5x
Telecommunication	5,569	5,549	+20.54	+0.37%	3	644,825	9.2%	352.3	5.1%	15.4x	4.3x	BEXIMCO	103,842	2.5%	0.0	NM	1.2x
Pharmaceutical	3,216	3,200	+16.15	+0.50%	34	610,219	8.7%	1,023.7	14.7%	16.3x	1.8x	BRACBANK	100,343	2.4%	341.9	10.3x	1.4x
Fuel & Power	1,315	1,323	-8.73	-0.66%	23	346,090	5.0%	469.9	6.7%	22.7x	0.8x	RENATA	92,870	2.3%	129.5	40.5x	2.9x
Cement	2,519	2,523	-3.38	-0.13%	7	120,309	1.7%	192.2	2.8%	20.3x	2.7x	UPGDCL	84,462	2.1%	8.9	11.3x	2.5x
Services & Real Estate	1,302	1,315	-12.99	-0.99%	9	72,008	1.0%	350.2	5.0%	22.6x	0.5x	BERGERPBL	83,295	2.0%	1.1	25.8x	5.4x
Engineering	3,391	3,329	+61.62	+1.85%	42	391,746	5.6%	595.2	8.5%	16.5x	1.2x	MARICO	74,214	1.8%	12.8	14.8x	7.5x
Food & Allied	19,781	19,974	-192.71	-0.96%	21	363,170	5.2%	914.6	13.1%	19.1x	5.6x	ISLAMIBANK	66,171	1.6%	30.4	10.2x	0.9x
IT	2,517	2,538	-21.05	-0.83%	11	33,108	0.5%	149.0	2.1%	27.3x	2.1x	ICB	64,698	1.6%	26.2	NM	1.5x
Textile	1,304	1,323	-18.88	-1.43%	58	135,293	1.9%	467.4	6.7%	NM	0.9x	UNILEVERCL	57,279	1.4%	1.1	64.5x	26.1x
Paper & Printing	5,366	5,325	+40.33	+0.76%	6	24,617	0.4%	145.9	2.1%	38.4x	1.1x	DUTCHBANGL	47,808	1.2%	17.6	6.3x	1.0x
Tannery	2,320	2,331	-10.71	-0.46%	6	25,408	0.4%	86.2	1.2%	43.8x	2.4x	OLYMPIC	40,688	1.0%	282.2	24.3x	3.9x
Jute	15,150	14,881	+269.12	+1.81%	3	3,550	0.1%	48.8	0.7%	NM	NM	POWERGRID	39,202	1.0%	3.7	NM	0.2x
Ceramics	474	476	-2.17	-0.46%	5	21,030	0.3%	53.4	0.8%	56.1x	1.3x	EBL	36,670	0.9%	28.8	5.3x	0.9x
Miscellaneous	4,233	4,221	+12.60	+0.30%	15	230,666	3.3%	157.6	2.3%	39.0x	1.8x	CITYBANK	32,599	0.8%	188.8	5.0x	0.9x
Corporate Bond**	6,743	6,769	-25.13	-0.37%	16	33,018	0.5%	1.8	0.0%	NM	NM	BXPHARMA	32,477	0.8%	34.7	6.1x	0.7x
Treasury Bond**	338	336	+2.02	+0.60%	235	2,858,703	40.9%	0.2	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
BANGAS	124.3	+10.0%	46.7	NM	5.9x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	BRACBANK	56.7	-1.4%	341.9	10.3x	1.4x
GPHISPAT	31.6	+9.7%	202.9	12.1x	0.6x	BEXIMCO	69,460	5.1%	NM	1.2x	OLYMPIC	203.5	+1.0%	282.2	24.3x	3.9x
BDAUTOCA	115.4	+8.0%	21.1	NM	15.9x	BATBC	45,948	3.4%	12.8x	3.9x	GP	343.4	+0.1%	214.5	13.1x	6.5x
LIBRAINFU	873.3	+7.5%	27.5	NM	1.0x	RENATA	35,002	2.6%	40.5x	2.9x	GPHISPAT	31.6	+9.7%	202.9	12.1x	0.6x
GEMINISEA	252.7	+7.1%	61.9	35.8x	11.5x	ISLAMIBANK	33,649	2.5%	10.2x	0.9x	LOVELLO	87.4	+4.5%	200.6	63.3x	6.6x
TAMIJTEX	135.6	+6.9%	9.7	20.4x	1.4x	BXPHARMA	32,479	2.4%	6.1x	0.7x	CITYBANK	24.2	+2.1%	188.8	5.0x	0.9x
ZEALBANGLA	101.9	+6.3%	1.7	NM	NM	BRACBANK	32,157	2.4%	10.3x	1.4x	IBNSINA	330.6	+5.3%	185.2	15.0x	3.1x
SAMORITA	68.0	+6.3%	17.9	NM	1.4x	GP	30,004	2.2%	13.1x	6.5x	UNIQUEHRL	56.7	-0.9%	135.4	11.8x	0.6x
KBPPWBIL	123.2	+6.1%	34.4	NM	10.4x	LHBL	24,690	1.8%	16.1x	4.0x	RENATA	809.7	+5.1%	129.5	40.5x	2.9x
ATLASBANG	74.5	+5.8%	2.2	NM	0.6x	EBL	24,199	1.8%	5.3x	0.9x	BATBC	418.6	-1.6%	127.3	12.8x	3.9x
						PUBALIBANK	20,448	1.5%	3.5x	0.6x						
						NBL	16,930	1.2%	NM	1.8x						
						CITYBANK	16,830	1.2%	5.0x	0.9x						
						BSRMLTD	14,210	1.0%	4.5x	0.6x						
						ALARABANK	13,534	1.0%	10.3x	1.1x						
						PRIMEBANK	12,985	1.0%	4.7x	0.8x						
						OLYMPIC	12,616	0.9%	24.3x	3.9x						
						UTTARABANK	11,350	0.8%	11.3x	0.8x						
						ORIONPHARM	11,317	0.8%	10.9x	0.5x						
						ROBI	10,738	0.8%	33.7x	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)
NEWLINE	36.0	-9.8%	0.0	69.2x	1.5x						PRAGATILIF	221.0	195.0	8.0	361	70.44
BIFC	7.3	-8.8%	0.2	NM	NM						TAMIJTEX	128.0	128.0	1.0	450	57.60
COPPERTECH	22.3	-7.5%	25.3	51.9x	1.7x						MIDLANDBNK	26.0	23.9	3.0	1,200	30.99
VAMLRBBF	5.1	-7.3%	0.2	NM	0.5x						KBPPWBIL	112.0	104.6	11.0	218	23.23
SPCERAMICS	16.8	-7.2%	28.5	76.4x	0.5x						LOVELLO	85.0	79.9	8.0	265	22.29
SPCL	56.0	-6.5%	104.6	11.5x	1.4x						AIL	96.3	86.0	2.0	217	18.84
GHCL	30.2	-5.9%	26.3	NM	0.7x						IFIC	10.2	10.0	3.0	1,467	14.77
CENTRALINS	45.1	-5.8%	6.4	22.6x	0.9x						NEWLINE	40.0	40.0	5.0	260	10.41
JUTESPINN	219.5	-5.8%	0.1	NM	NM						MLDYEING	13.3	13.3	1.0	500	6.65
SEAPEARL	53.4	-5.8%	90.5	17.9x	2.8x						MIDASFIN	11.0	11.0	1.0	592	6.52

\* 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
PRAGATILIF	221.0	195.0	70.4	361	8
TAMIJTEX	128.0	128.0	57.6	450	1
MIDLANDBNK	26.0	23.9	31.0	1,200	3
KBPPWBIL	112.0	104.6	23.2	218	11
LOVELLO	85.0	79.9	22.3	265	8
AIL	96.3	86.0	18.8	217	2
IFIC	10.2	10.0	14.8	1,467	3
NEWLINE	40.0	40.0	10.4	260	5
MLDYEING	13.3	13.3	6.7	500	1
MIDASFIN	11.0	11.0	6.5	592	1
1STPRIMFMF	44.0	43.0	3.8	89	5
AL-HAJTEX	126.0	125.1	2.5	20	2
RELIANCE1	21.5	18.6	2.5	130	2
BRACBANK	58.0	58.0	2.3	40	1
GP	342.0	341.7	2.2	7	2
CONFIDCEM	85.8	85.8	2.1	24	1
TOSRIFA	27.2	27.2	1.6	58	3
TOSRIFA	27.2	27.2	1.6	58	3
SPCL	65.8	65.8	1.3	19	1
BEACHHATCH	80.4	80.4	0.8	10	1
AFTABAUTO	39.9	39.9	0.8	20	1
ARGONDENIM	20.2	20.2	0.8	39	1
<b>Total</b>			<b>290.1</b>		<b>76</b>

**Important DSE News**

**ALLTEX**

The company has informed that the Board of Directors has decided to approve the revaluation report on Land and Land Development of the company submitted by A. Qasem & Co., Chartered Accountants, resulting in an increase of the company's total Land and Land Development value to Taka 218,82,00,000.00 from Taka 137,39,07,073.00 as of June 30, 2024, an increment of Taka 81,42,92,927.00 to be added to the Net Asset Value (NAV) of the company.

**SIBL**

The company has informed that the Board of Directors has elected Dr. M. Sadiqu Islam, FCMA as the Chairman of the Board of Directors of the company with immediate effect.

**SHAHJABANK**

Mr. Tofazzal Hossain, a Sponsor of the Company, has expressed his intention to sell 7,35,729 shares out of his total holding of 1,56,78,954 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

**FIRSTSBANK**

The company has informed that Bangladesh Bank has appointed Chairman and Independent Directors of First Security Islami Bank PLC. as under with effect from September 01, 2024: 01. Mr. Mohammad Abdul Mannan, Chairman & Independent Director, 02. Mr. Md. Azizur Rahman, Independent Director, 03. Mr. Md. Abdul Quddus, Independent Director, 04. Mr. Md. Saiful Alam, PhD, FCMA, Independent Director and 05. Mr. Md. Ragib Ahsan, FCA, Independent Director.

**UCB**

The company has informed that Bangladesh Bank, on August 27, 2024, dissolved the previous Board of the company and formed the new Board of Directors of the company. Subsequently, a Meeting of the Board of Directors of the company was held on August 29, 2024 and the Board was reconstituted as follows: 1. Mr. Sharif Zahir, Chairman, 2. Mr. Md. Shazzad Hossain, Independent Director & Vice-Chairman, 3. Mr. Md. Tanvir Khan, Director & Chairman, Executive Committee, 4. Mr. Obaidur Rahman, FCA, Independent Director & Chairman, Audit Committee and 5. Mr. Md. Yusuf Ali, Independent Director & Chairman, Risk Management Committee

**PADMAOIL**

The company has informed that Mr. A K M Zafar Ullah Khan, Ex Secretary to the Government of Bangladesh has been appointed as the Chairman of the Board of Directors of the company with effect from 29.08.2024.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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