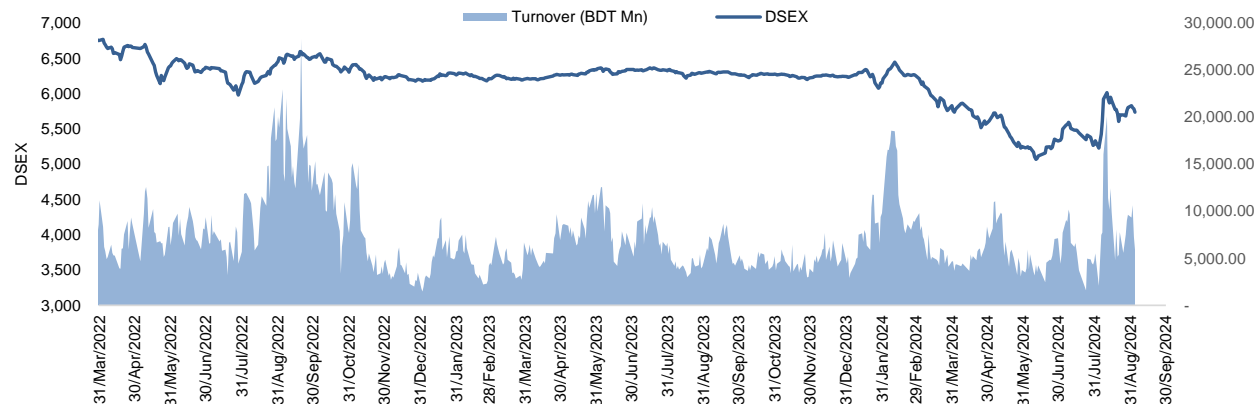


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.82%) lost 47.45 points and closed at 5,739.07. The blue-chip index DS30 (-0.93%), the Shariah-based index DSES (-0.78%), and the large-cap index CDSET (-0.73%) closed at 2,113.25, 1,227.86, and 1,135.03 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.84% followed by NBF1 (-1.75%), Telecommunication (-1.28%), Bank (-0.96%), Food & Allied (-0.77%), Pharmaceutical (-0.69%), and Fuel & Power (+0.42%), respectively. Block trades contributed 5.4% of the overall market turnover. BRAC Bank Ltd. (-1.4%) was the most traded share with a turnover of BDT 476 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,739.07	5,786.52	-47.45	-0.82%	-8.1%
DS30	2,113.25	2,133.10	-19.85	-0.93%	+0.9%
DSES	1,227.86	1,237.48	-9.62	-0.78%	-10.0%
CDSET	1,135.03	1,143.38	-8.35	-0.73%	-5.6%

	Advanced	Declined	Unchanged	Total
All Category	81	264	52	397
A Category (Equity)	47	159	31	237
B Category (Equity)	19	69	13	101
N Category (Equity)	1	2	1	4
Z Category (Equity)	14	34	7	55
Mutual Funds	6	14	16	36
Corporate Bonds	1	1	2	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,947,436	6,987,362	-0.6%
	Mn USD	57,895	58,228	
Turnover	Mn BDT	5,935	7,265	-18.3%
	Mn USD	49	61	
Volume	Mn Shares	164	198	-17.4%
No. of Trade		165,073	197,380	-16.4%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 04, 2024

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Figure: Sectorial Turnover (BDT Mn)

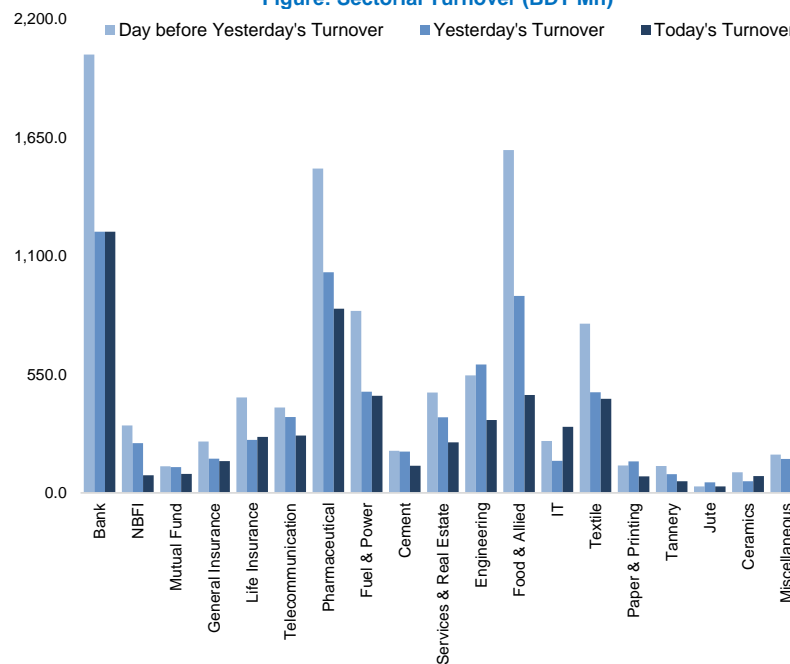
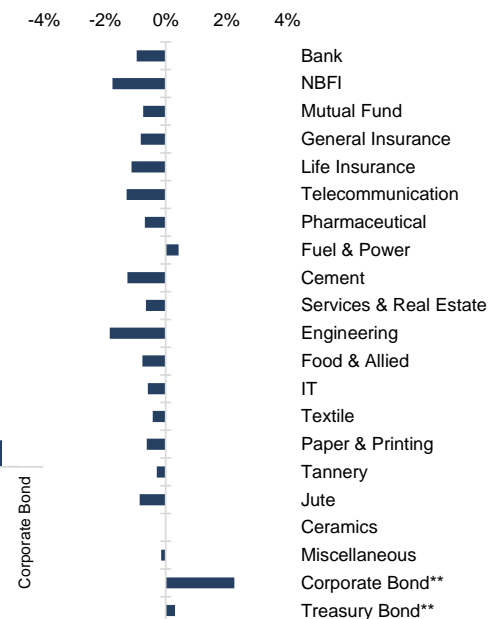


Figure: Sectorial Mcap Change



Market PE 16.0x

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	1,541	1,556	-14.88	-0.96%	36	738,377	10.6%	1,211.5	21.6%	8.0x	0.7x	GP	459,507	11.3%	171.4	13.0x	6.4x
NBFI	1,433	1,459	-25.54	-1.75%	23	138,729	2.0%	81.2	1.4%	NM	NM	BATBC	224,694	5.5%	77.9	12.7x	3.9x
Mutual Fund	678	683	-5.07	-0.74%	37	31,690	0.5%	87.9	1.6%	NM	0.6x	WALTONHIL	214,776	5.3%	47.9	16.6x	2.0x
General Insurance	3,093	3,119	-25.56	-0.82%	43	89,595	1.3%	148.0	2.6%	16.3x	1.4x	SQRPHARMA	205,213	5.0%	84.5	10.1x	1.7x
Life Insurance	2,386	2,413	-27.14	-1.12%	15	63,424	0.9%	259.6	4.6%	NM	NM	ROBI	153,995	3.8%	79.1	33.0x	2.4x
Telecommunication	5,498	5,569	-71.56	-1.28%	3	636,540	9.2%	266.5	4.7%	15.2x	4.2x	BEXIMCO	103,842	2.5%	0.0	NM	1.2x
Pharmaceutical	3,194	3,216	-22.07	-0.69%	34	606,033	8.7%	854.9	15.2%	16.2x	1.7x	BRACBANK	98,927	2.4%	475.9	10.2x	1.4x
Fuel & Power	1,320	1,315	+5.53	+0.42%	23	347,546	5.0%	450.7	8.0%	22.8x	0.8x	RENATA	91,310	2.2%	46.2	39.8x	2.8x
Cement	2,488	2,519	-31.68	-1.26%	7	118,796	1.7%	125.8	2.2%	20.0x	2.6x	UPGDCL	88,577	2.2%	23.5	11.8x	2.6x
Services & Real Estate	1,294	1,302	-8.46	-0.65%	9	71,540	1.0%	234.1	4.2%	22.4x	0.5x	BERGERPBL	82,947	2.0%	5.6	25.7x	5.4x
Engineering	3,328	3,391	-62.47	-1.84%	42	384,529	5.5%	337.6	6.0%	16.2x	1.2x	MARICO	73,373	1.8%	2.8	14.7x	7.4x
Food & Allied	19,629	19,781	-151.77	-0.77%	21	360,384	5.2%	453.7	8.1%	19.0x	5.6x	ISLAMIBANK	64,400	1.6%	31.1	9.9x	0.9x
IT	2,502	2,517	-14.85	-0.59%	11	32,913	0.5%	306.7	5.5%	27.2x	2.1x	ICB	63,397	1.6%	9.3	NM	1.5x
Textile	1,298	1,304	-5.56	-0.43%	58	134,716	1.9%	436.9	7.8%	NM	0.9x	UNILEVERCL	57,279	1.4%	3.1	64.5x	26.1x
Paper & Printing	5,332	5,366	-33.42	-0.62%	6	24,464	0.4%	76.5	1.4%	38.2x	1.1x	DUTCHBANGL	47,984	1.2%	25.6	6.3x	1.0x
Tannery	2,313	2,320	-6.78	-0.29%	6	25,334	0.4%	53.9	1.0%	43.7x	2.4x	OLYMPIC	39,488	1.0%	74.2	23.6x	3.8x
Jute	15,020	15,150	-130.18	-0.86%	3	3,520	0.1%	29.9	0.5%	NM	NM	POWERGRID	38,745	1.0%	4.2	NM	0.2x
Ceramics	474	474	-0.03	-0.01%	5	21,029	0.3%	77.8	1.4%	56.1x	1.3x	EBL	36,398	0.9%	58.6	5.2x	0.9x
Miscellaneous	4,227	4,233	-6.25	-0.15%	15	230,326	3.3%	123.1	2.2%	39.0x	1.8x	BXPHARMA	32,700	0.8%	32.7	6.1x	0.7x
Corporate Bond**	6,896	6,743	+152.16	+2.26%	16	33,440	0.5%	0.1	0.0%	NM	NM	CITYBANK	31,791	0.8%	86.2	4.8x	0.8x
Treasury Bond**	339	338	+1.03	+0.30%	235	2,854,028	41.1%	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
USMANIAGL	44.4	+9.9%	3.5	NM	0.6x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	BRACBANK	55.9	-1.4%	475.9	10.2x	1.4x
SPCERAMICS	18.4	+9.5%	51.4	83.6x	0.6x	BEXIMCO	69,460	5.1%	NM	1.2x	AGNISYSL	33.8	+3.7%	216.1	31.6x	2.1x
PRIMELIFE	44.7	+6.7%	11.7	NM	NM	BATBC	45,948	3.4%	12.7x	3.9x	IBNSINA	345.0	+4.4%	212.6	15.6x	3.2x
CENTRALINS	48.0	+6.4%	32.6	24.0x	1.0x	RENATA	35,002	2.6%	39.8x	2.8x	GP	340.3	-0.9%	171.4	13.0x	6.4x
KPCL	19.9	+6.4%	54.4	60.3x	1.1x	ISLAMIBANK	33,649	2.5%	9.9x	0.9x	IFIC	10.2	-	113.0	7.7x	0.5x
PROGRESLIF	44.8	+6.4%	4.8	NM	NM	BXPHARMA	32,479	2.4%	6.1x	0.7x	SEAPEARL	52.3	-2.1%	112.3	17.6x	2.7x
SHYAMPSUG	150.0	+6.4%	10.0	NM	NM	BRACBANK	32,157	2.4%	10.2x	1.4x	MIDLANDBNK	27.7	+3.0%	111.8	14.9x	1.9x
MEGHNAPET	30.6	+5.5%	1.2	NM	NM	GP	30,004	2.2%	13.0x	6.4x	MJLBD	96.7	-5.1%	109.0	9.8x	2.1x
UPGDCL	152.8	+4.9%	23.5	11.8x	2.6x	LHBL	24,690	1.8%	15.9x	3.9x	BANGAS	127.2	+2.3%	88.5	NM	6.1x
IBNSINA	345.0	+4.4%	212.6	15.6x	3.2x	EBL	24,199	1.8%	5.2x	0.9x	SPCL	58.3	+4.1%	88.3	12.0x	1.5x

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)
FAREASTFIN	4.6	-9.8%	0.8	NM	NM	SQRPHARMA	232.0	232.0	3.0	285	66.12
AMBEEPHA	900.4	-7.5%	13.4	NM	88x	AIL	95.9	86.0	10.0	556	49.54
RENWICKJA	711.0	-6.1%	0.6	NM	NM	NTC	275.4	275.4	4.0	174	47.85
RUPALILIFE	132.8	-5.6%	43.5	NM	NM	MIDLANDBNK	26.9	26.0	12.0	1,395	36.93
UCB	12.2	-5.4%	26.1	4.8x	0.4x	LOVELLO	85.0	79.9	10.0	284	23.80
NEWLINE	34.1	-5.3%	0.4	65.6x	1.4x	PRAGATILIF	206.0	195.0	5.0	105	20.54
RELIANCE1	18.1	-5.2%	8.6	NM	1.7x	BXPHARMA	75.0	75.0	2.0	231	17.33
MJLBD	96.7	-5.1%	109.0	9.8x	2.1x	BEACHHATCH	84.9	84.9	1.0	123	10.44
DAFODILCOM	73.8	-5.0%	1.9	NM	5.5x	KBPWBIL	115.0	112.0	5.0	57	6.45
TUNGHAI	4.0	-4.8%	1.7	NM	NM	BEXIMCO	111.0	104.1	6.0	58	6.11

* 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
SQRPHARMA	232.0	232.0	66.1	285	3
AIL	95.9	86.0	49.5	556	10
NTC	275.4	275.4	47.9	174	4
MIDLANDBNK	26.9	26.0	36.9	1,395	12
LOVELLO	85.0	79.9	23.8	284	10
PRAGATILIF	206.0	195.0	20.5	105	5
BXPHARMA	75.0	75.0	17.3	231	2
BEACHHATCH	84.9	84.9	10.4	123	1
KBPPWBIL	115.0	112.0	6.5	57	5
BEXIMCO	111.0	104.1	6.1	58	6
EIL	51.0	51.0	5.6	110	1
ISLAMIBANK	41.5	41.5	4.2	100	1
AGNISYSL	33.2	32.5	3.9	119	3
GPHISPAT	32.6	32.6	3.3	100	1
IFIC	10.2	10.2	2.6	258	1
SHEPHERD	15.1	15.1	2.4	158	1
NAVANACNG	27.2	27.2	1.6	60	1
NAVANACNG	27.2	27.2	1.6	60	1
DHAKABANK	13.3	13.3	1.0	77	1
NRBBANK	13.3	13.3	0.9	70	1
TOSRIFA	27.8	27.8	0.9	34	1
PROGRESLIF	44.0	44.0	0.9	20	1
Total			318.3		79

Important DSE News

RUPALIBANK

The Company will be placed in 'B' category from existing 'Z' category with effect from September 05, 2024 as the Company has reported the credit of 5% Stock Dividend for the year ended December 31, 2023.

UNIONCAP

Refer to their earlier news disseminated by DSE on 30.06.2024 regarding dividend declaration, the company has further informed that the Board of Directors has decided to change the scheduled date of the forthcoming 26th AGM of the Company to September 30, 2024 instead of the earlier declared date of September 10, 2024. All other information relating to the AGM will be remain unchanged.

PENINSULA

The company has informed that the Board of Directors has decided to appoint Mr. Md. Shamsul Arefin Maruf as the Company Secretary with effect from August 27, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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