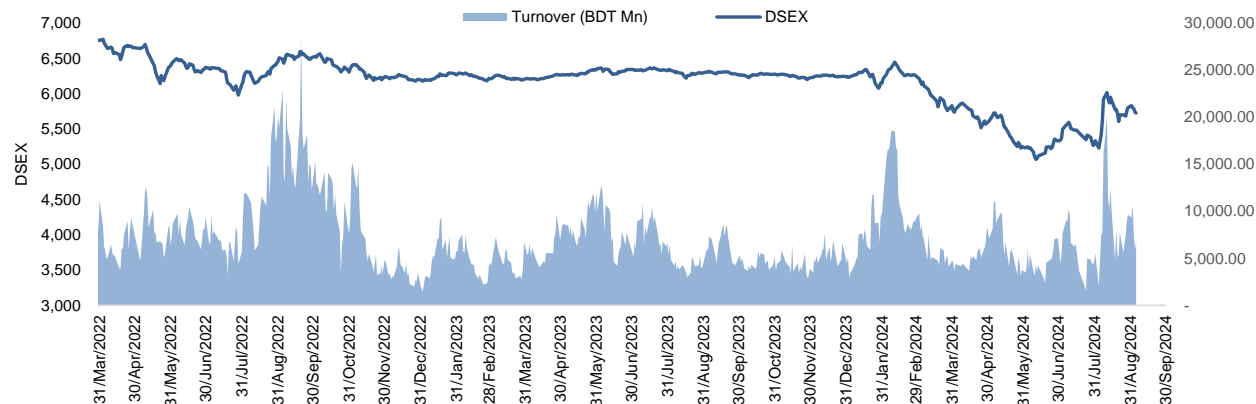


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.18%) lost 10.42 points and closed at 5,728.65. The blue-chip index DS30 (+0.05%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (-0.16%) closed at 2,114.36, 1,228.81, and 1,133.24 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 2.92% followed by NBFi (-2.22%), Telecommunication (-1.04%), Food & Allied (-0.63%), Pharmaceutical (-0.35%), Fuel & Power (+0.07%), and Bank (+0.55%), respectively. Block trades contributed 3.3% of the overall market turnover. Linde Bangladesh Limited (+17.8%) was the most traded share with a turnover of BDT 1,025 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,728.65	5,739.07	-10.42	-0.18%	-8.3%
DS30	2,114.36	2,113.25	+1.11	+0.05%	+1.0%
DSES	1,228.81	1,227.86	+0.95	+0.08%	-9.9%
CDSET	1,133.24	1,135.03	-1.79	-0.16%	-5.8%

	Advanced	Declined	Unchanged	Total
All Category	98	250	47	395
A Category (Equity)	56	158	22	236
B Category (Equity)	25	61	16	102
N Category (Equity)	1	3	0	4
Z Category (Equity)	16	28	9	53
Mutual Funds	6	16	14	36
Corporate Bonds	0	3	0	3
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,924,312	6,947,436	-0.3%
	Mn USD	57,703	57,895	
Turnover	Mn BDT	6,749	5,935	+13.7%
	Mn USD	56	49	
Volume	Mn Shares	184	164	+12.5%
No. of Trade		180,345	165,073	+9.3%

* Average Interbank Exchange Rate is BDT 120.00 as of Sep 05, 2024

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Figure: Sectorial Turnover (BDT Mn)

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

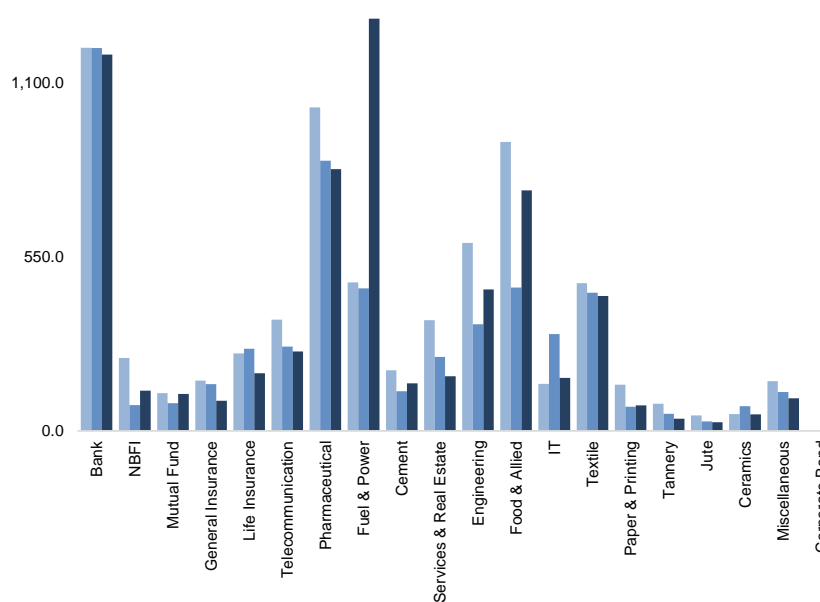
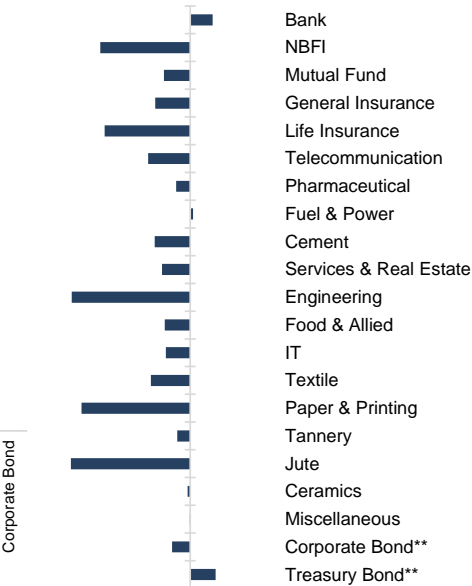


Figure: Sectorial Mcap Change

■ -4% ■ -2% ■ 0% ■ 2%



Market PE 15.9x
Market PB 1.3x

* 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	1,550	1,541	+8.55	+0.55%	36	742,472	10.7%	1,191.0	18.3%	8.1x	0.7x	GP	456,942	11.3%	173.1	12.9x	6.4x
NBFI	1,401	1,433	-31.85	-2.22%	23	135,646	2.0%	126.8	1.9%	NM	NM	BATBC	222,372	5.5%	106.6	12.6x	3.9x
Mutual Fund	674	678	-4.38	-0.65%	37	31,485	0.5%	116.6	1.8%	NM	0.6x	WALTONHIL	204,507	5.1%	105.6	15.1x	1.8x
General Insurance	3,066	3,093	-26.73	-0.86%	43	88,821	1.3%	95.3	1.5%	16.1x	1.4x	SQRPHARMA	204,327	5.0%	66.1	10.1x	1.7x
Life Insurance	2,335	2,386	-50.45	-2.11%	15	62,083	0.9%	182.5	2.8%	NM	NM	ROBI	149,805	3.7%	58.2	32.1x	2.4x
Telecommunication	5,441	5,498	-56.92	-1.04%	3	629,949	9.1%	251.1	3.8%	15.0x	4.2x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,183	3,194	-11.15	-0.35%	34	603,916	8.7%	828.0	12.7%	16.2x	1.7x	BRACBANK	99,458	2.5%	147.5	10.2x	1.4x
Fuel & Power	1,321	1,320	+0.97	+0.07%	23	347,800	5.0%	1,304.1	20.0%	22.8x	0.8x	RENATA	90,094	2.2%	37.1	39.3x	2.8x
Cement	2,466	2,488	-21.80	-0.88%	7	117,755	1.7%	150.1	2.3%	19.9x	2.6x	UPGDCL	86,664	2.1%	6.8	11.6x	2.6x
Services & Real Estate	1,285	1,294	-9.02	-0.70%	9	71,042	1.0%	173.0	2.7%	22.3x	0.5x	BERGERPBL	83,030	2.1%	5.2	25.7x	5.4x
Engineering	3,231	3,328	-97.32	-2.92%	42	373,286	5.4%	447.7	6.9%	15.4x	1.1x	MARICO	72,878	1.8%	6.6	14.6x	7.3x
Food & Allied	19,506	19,629	-123.18	-0.63%	21	358,122	5.2%	761.4	11.7%	18.8x	5.6x	ISLAMIBANK	64,561	1.6%	22.0	9.9x	0.9x
IT	2,487	2,502	-15.03	-0.60%	11	32,715	0.5%	167.7	2.6%	27.0x	2.1x	ICB	61,489	1.5%	8.3	NM	1.5x
Textile	1,286	1,298	-12.60	-0.97%	58	133,410	1.9%	426.6	6.5%	NM	0.9x	UNILEVERCL	55,285	1.4%	1.5	62.3x	25.2x
Paper & Printing	5,189	5,332	-142.94	-2.68%	6	23,808	0.3%	80.6	1.2%	37.2x	1.0x	DUTCHBANGL	47,984	1.2%	7.4	6.3x	1.0x
Tannery	2,306	2,313	-7.39	-0.32%	6	25,253	0.4%	38.9	0.6%	43.5x	2.4x	OLYMPIC	41,627	1.0%	435.7	24.9x	4.0x
Jute	14,577	15,020	-442.59	-2.95%	3	3,416	0.0%	27.5	0.4%	NM	NM	POWERGRID	38,197	0.9%	1.8	NM	0.2x
Ceramics	473	474	-0.32	-0.07%	5	21,014	0.3%	51.9	0.8%	56.0x	1.3x	EBL	35,991	0.9%	23.4	5.2x	0.9x
Miscellaneous	4,227	4,227	-0.46	-0.01%	15	230,301	3.3%	102.7	1.6%	39.0x	1.8x	BXPHARMA	34,128	0.8%	55.4	6.4x	0.7x
Corporate Bond**	6,865	6,896	-30.72	-0.45%	16	32,976	0.5%	0.8	0.0%	NM	NM	CITYBANK	31,656	0.8%	67.2	4.8x	0.8x
Treasury Bond**	341	339	+2.12	+0.62%	235	2,858,540	41.3%	0.1	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
LINDEBD	1,547.3	+17.8%	1,024.8	41.1x	3.8x	SQRPHARMA	117,112	8.6%	10.1x	1.7x	LINDEBD	1,547.3	+17.8%	1,024.8	41.1x	3.8x
NRBBANK	13.3	+9.9%	183.2	16.1x	1.0x	BEXIMCO	69,460	5.1%	NM	1.2x	OLYMPIC	208.2	+5.4%	435.7	24.9x	4.0x
RELIANCE1	19.6	+8.3%	11.1	NM	1.8x	BATBC	45,948	3.4%	12.6x	3.9x	IBNSINA	354.6	+2.8%	218.7	16.1x	3.3x
OLYMPIC	208.2	+5.4%	435.7	24.9x	4.0x	RENATA	35,002	2.6%	39.3x	2.8x	NRBBANK	13.3	+9.9%	183.2	16.1x	1.0x
NTC	320.3	+4.7%	3.0	NM	NM	ISLAMIBANK	33,649	2.5%	9.9x	0.9x	IFIC	10.5	+2.9%	180.8	7.9x	0.5x
RUPALIBANK	29.5	+4.6%	49.3	20.5x	0.8x	BXPHARMA	32,479	2.4%	6.4x	0.7x	GP	338.4	-0.6%	173.1	12.9x	6.4x
BXPHARMA	76.5	+4.4%	55.4	6.4x	1x	BRACBANK	32,157	2.4%	10.2x	1.4x	MIDLANDBNK	28.6	+3.2%	156.6	15.4x	2.0x
FAREASTFIN	4.8	+4.3%	0.2	NM	NM	GP	30,004	2.2%	12.9x	6.4x	BRACBANK	56.2	+0.5%	147.5	10.2x	1.4x
NRBCBANK	10.5	+4.0%	10.0	3.9x	0.6x	LHBL	24,690	1.8%	15.8x	3.9x	GPHISPAT	32.1	+2.9%	123.4	12.2x	0.6x
NORTHRNINS	40.0	+3.9%	0.1	21.5x	1.6x	EBL	24,199	1.8%	5.2x	0.9x	BATBC	411.8	-1.0%	106.6	12.6x	3.9x
						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%	4.5x	0.6x						
						ALARABANK	13,534	1.0%	10.5x	1.1x						
						PRIMEBANK	12,985	1.0%	4.6x	0.7x						
						OLYMPIC	12,616	0.9%	24.9x	4.0x						
						UTTARABANK	11,350	0.8%	11.6x	0.8x						
						ORIONPHARM	11,317	0.8%	10.5x	0.5x						
						ROBI	10,738	0.8%	32.1x	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)
RUPALILIFE	119.6	-9.9%	71.1	NM	NM						MIDLANDBNK	28.4	27.0	13.0	1,558	42.79
1STPRIMFMF	36.6	-9.9%	25.2	NM	3x						LOVELLO	85.0	85.0	2.0	500	42.50
LANKABAFIN	20.8	-6.3%	53.1	35.9x	1.1x						SBACBANK	7.5	7.4	2.0	5,200	38.73
CRYSTALINS	67.0	-6.3%	13.1	23.3x	2.8x						BEXIMCO	115.1	104.1	5.0	120	12.51
MEGHNAPET	28.7	-6.2%	0.3	NM	NM						RELIANCE1	18.6	17.8	8.0	657	12.21
ORIONINFU	310.8	-6.1%	43.5	NM	20.8x						KBPWBIL	115.0	114.0	3.0	101	11.56
BDAUTOCA	106.4	-5.6%	6.6	NM	14.6x						BEACHHATCH	84.9	80.0	3.0	113	9.33
DESHBANDHU	24.4	-5.4%	13.4	41.4x	1.3x						PRAGATILIF	223.0	188.0	7.0	38	8.03
SONALIPAPR	157.3	-5.4%	65.0	NM	1.0x						RUPALILIFE	145.0	130.0	3.0	39	5.59
VAMLDBMF1	5.6	-5.1%	0.0	NM	0.5x						IFIC	10.2	10.2	1.0	541	5.52

* 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
MIDLANDBNK	28.4	27.0	42.8	1,558	13
LOVELLO	85.0	85.0	42.5	500	2
SBACBANK	7.5	7.4	38.7	5,200	2
BEXIMCO	115.1	104.1	12.5	120	5
RELIANCE1	18.6	17.8	12.2	657	8
KBPPWBIL	115.0	114.0	11.6	101	3
BEACHHATCH	84.9	80.0	9.3	113	3
PRAGATILIF	223.0	188.0	8.0	38	7
RUPALILIFE	145.0	130.0	5.6	39	3
IFIC	10.2	10.2	5.5	541	1
RENATA	781.5	736.5	4.1	5	2
GP	370.0	370.0	3.7	10	3
TOSRIFA	27.2	26.5	3.5	130	2
1STPRIMFMF	44.0	38.1	3.2	82	4
SOUTHEASTB	11.3	11.3	2.9	260	1
POWERGRID	44.7	44.7	2.2	50	1
LINDEBD	1,285.0	1,285.0	1.6	1	1
LINDEBD	1,285.0	1,285.0	1.6	1	1
SEAPEARL	57.5	57.5	1.4	25	1
BATBC	452.5	452.5	1.4	3	1
ACMELAB	91.5	91.5	1.1	13	1
QUASEMIND	42.0	42.0	1.1	26	1
Total			224.6		77

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SONARBAINS		0.0%	10%	Record Date	11-Sep-24
LINDEBD		0.0%	4100%	Record Date	25-Sep-24
RUPALILIFE		0.0%	12%	Record Date	26-Sep-24
WALTONHIL		0.0%	350%	Record Date	30-Sep-24
GLOBALINS		0.0%	10%	Record Date	1-Oct-24

Important DSE News
UCB

Refer to the earlier news disseminated by DSE on 28.05.2024, the company has further informed that the Board of Directors of the company, among others, has decided to cancel the decision of investing Tk. 50.00 Crore as Sponsor of a Closed End Growth Mutual Fund Managed by CAPITEC Asset Management Limited considering the prevailing market situation.

LINDEBD

The company has informed that the Board of Directors has approved that an interim dividend of Taka 410.00 per Ordinary Share (4100%) of Taka 10 each (the declared dividend includes capital gain out of divestment of subsidiary Linde Industries Pvt. Ltd.) in issue be paid based on the Audited Interim Financial Statements of the Company as on July 31, 2024. The Company has also reported EPS of Tk. 415.08, NAVPS of Tk. 632.35 and NOCFPS of Tk. 13.19 as on July 31, 2024 as against EPS of Tk. 8.84, NOCFPS of Tk. 8.38 as on July 31, 2023 and NAVPS of Tk. 371.27 as on December 31, 2023. Reasons for deviation in EPS, NOCFPS and NAVPS: EPS increased mainly due to higher profit resulting from capital gain out of sale of shares of subsidiary company Linde Industries Pvt. Ltd. NOCFPS increased due to higher collection from customers and NAVPS increased mainly for cash received from divestment of LIPL. The Share Transfer Register of the Company shall remain closed for the purpose on September 25, 2024 which had been declared as Record Date.

WALTONHIL

The Board of Directors has recommended 350% Cash dividend for General Public shareholders and 200% Cash dividend for Directors and Sponsors for the year ended June 30, 2024. Date of AGM: 29.10.2024, Time: 12:00 PM, Venue: Hybrid System. Record Date: 30.09.2024. The Company has also reported EPS of Tk. 44.78, NAV per share of Tk. 379.30 (with revaluation), Tk. 277.86 (without revaluation) and NOCFPS of Tk. 56.96 for the year ended June 30, 2024 as against Tk. 25.84, Tk. 343.73 (with revaluation), Tk. 242.18 (without revaluation) and Tk. 111.84 respectively for the year ended June 30, 2023.

SBACBANK

Prime Bank Securities Ltd. has informed that M/S Vicar International (where Mr. Mohammad Nazmul Haq is the Managing Partner of M/S Vicar International and also a nominated Director of SBAC Bank PLC.) has expressed its intention to buy 25,000,000 shares of SBAC Bank PLC. at prevailing market price (in the Block Market).

ALARABANK

The company has informed that Bangladesh Bank has appointed the Chairman and Independent Directors of the company, the names of whom are as follows: 01. Mr. Khwaja Shahriar, Former Managing Director, Lankabangla Finance PLC. as an Independent Director and Chairman, 02. Mr. Md. Shahin UI Islam, Former Executive Director, Bangladesh Bank as an Independent Director, 03. Mr. Md. Abdul Wadud, Former Deputy Managing Director, NRB Bank Ltd. as an Independent Director, 04. Mr. Mohammed Abu Eusuf, PHD, Professor, Department of Development Studies, Dhaka University as an Independent Director and 05. Mr. Mohammad Asraful Hassan, FCA, Chartered Accountants as an Independent Director.

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