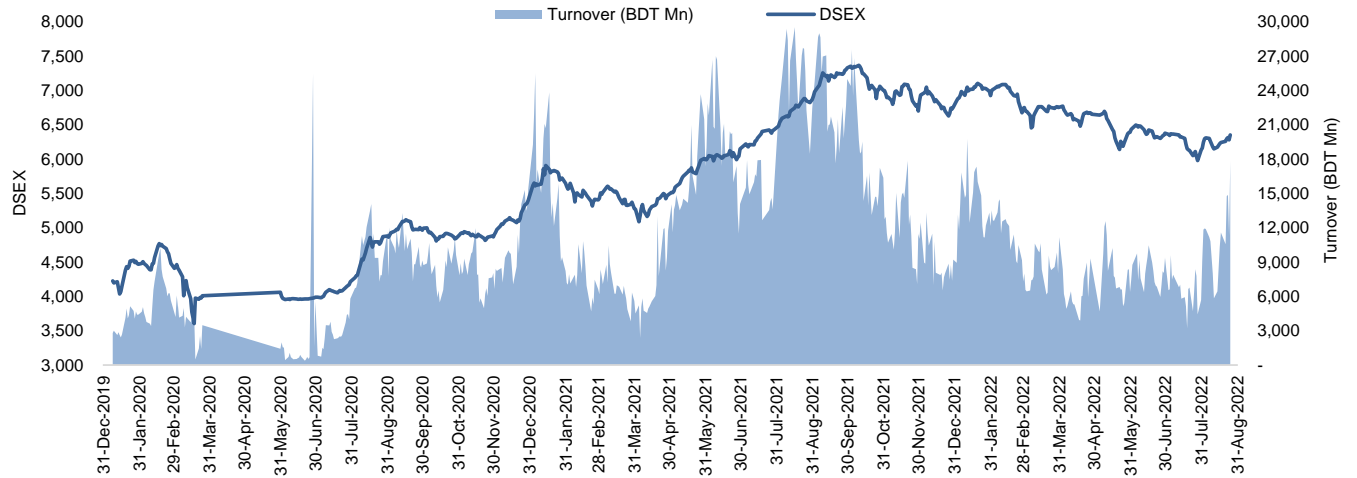


**Daily Market Update**

The market closed in green today. The benchmark index DSEX (+1.19%) gained 74.72 points and closed at 6,355.07. The blue-chip index DS30 (+1.05%), the Shariah-based index DSES (+0.80%), and the large-cap index CDSET (+0.54%) closed at 2,267.35, 1,390.61, and 1,241.26 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 4.59% followed by Fuel & Power (+1.23%), Pharmaceutical (+0.75%), Food & Allied (+0.47%), Engineering (+0.44%), Bank (+0.38%), and Telecommunication (+0.06%), respectively. Block trades contributed 0.8% of the overall market turnover. Orion Pharma Ltd. (+7.8%) was the most traded share with a turnover of BDT 1,084 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,355.07	6,280.35	+74.72	+1.19%	-5.9%
DS30	2,267.35	2,243.69	+23.66	+1.05%	-10.5%
DSES	1,390.61	1,379.61	+11.01	+0.80%	-2.8%
CDSET	1,241.26	1,234.59	+6.67	+0.54%	-8.7%

	Advanced	Declined	Unchanged	Total
All Category	234	54	91	379
A Category (Equity)	169	32	56	257
B Category (Equity)	57	17	19	93
N Category (Equity)	3	1	2	6
Z Category (Equity)	5	4	14	23
Mutual Funds	3	4	27	34
Corporate Bonds	0	1	1	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,132,404	5,092,996	
	Mn USD	54,025	53,610	+0.8%
Turnover	Mn BDT	17,775	11,337	+56.8%
	Mn USD	187	119	
Volume	Mn Shares	414	266	+55.6%
No. of Trade		267,596	198,484	+34.8%

\* Exchange Rate is BDT 95.00 as of Aug 25, 2022

Figure: Sectorial Turnover (BDT)

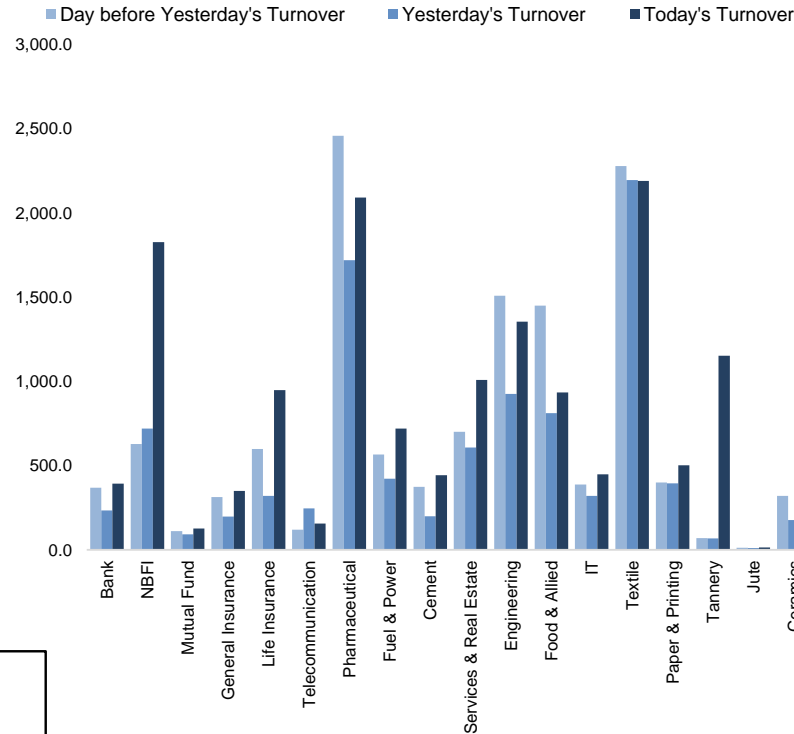
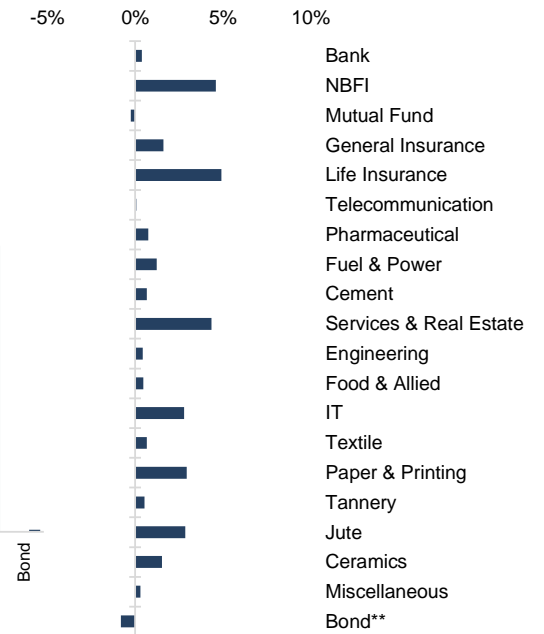


Figure: Sectorial Mcap Change



Market PE 15.9x  
Market PB 1.7x

<b>Fahim Hassan</b> Research Associate (880) 1709636546 fahim.hassan@bracepl.com	<b>Billal Hossain</b> Research Associate (880) 1708805229 billal.hossain@bracepl.com
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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	1,430	1,425	+5.41	+0.38%	33	659,761	14.6%	393.3	2.4%	7.7x	0.7x	GP	387,536	8.6%	96.4	11.4x	7.7x
NBFI	2,106	2,014	+92.51	+4.59%	23	207,443	4.6%	1,827.6	11.0%	NM	4.0x	WALTONHIL	317,711	7.0%	27.2	26.1x	3.1x
Mutual Fund	881	883	-2.11	-0.24%	36	38,837	0.9%	126.5	0.8%	NM	0.8x	BATBC	280,476	6.2%	139.9	18.1x	7.4x
General Insurance	3,171	3,121	+50.08	+1.60%	41	93,724	2.1%	350.0	2.1%	15.1x	1.5x	SQURPHARMA	187,928	4.2%	95.5	10.1x	1.9x
Life Insurance	2,421	2,307	+113.37	+4.91%	13	69,756	1.5%	948.0	5.7%	NM	NM	ROBI	157,138	3.5%	13.4	NM	2.4x
Telecommunication	4,941	4,938	+3.05	+0.06%	3	581,811	12.8%	156.4	0.9%	15.5x	4.6x	RENATA	139,705	3.1%	11.3	25.2x	4.9x
Pharmaceutical	3,844	3,816	+28.80	+0.75%	32	721,964	15.9%	2,091.6	12.6%	17.8x	2.6x	UPGDCL	139,243	3.1%	17.5	11.3x	4.2x
Fuel & Power	1,744	1,722	+21.16	+1.23%	23	455,101	10.0%	719.9	4.3%	11.4x	1.2x	BEXIMCO	104,370	2.3%	978.0	7.3x	1.4x
Cement	2,576	2,559	+17.24	+0.67%	7	124,138	2.7%	442.5	2.7%	27.0x	2.7x	LHBL	86,987	1.9%	412.7	22.3x	4.9x
Services & Real Estate	1,538	1,474	+64.17	+4.35%	8	58,165	1.3%	1,008.1	6.1%	80.9x	1.1x	BERGERPBL	81,644	1.8%	2.5	26.5x	7.1x
Engineering	4,587	4,567	+20.22	+0.44%	42	537,070	11.9%	1,354.2	8.1%	20.2x	1.9x	MARICO	77,578	1.7%	7.9	22.1x	33.7x
Food & Allied	21,535	21,435	+100.18	+0.47%	21	382,415	8.4%	934.9	5.6%	22.9x	8.1x	ICB	77,197	1.7%	10.4	43.7x	1.7x
IT	2,616	2,545	+71.11	+2.79%	11	33,515	0.7%	448.8	2.7%	27.2x	2.3x	BXPBARMA	73,073	1.6%	96.4	12.7x	1.8x
Textile	1,706	1,695	+11.39	+0.67%	58	184,062	4.1%	2,189.6	13.2%	27.6x	1.1x	BEACONPHAR	63,502	1.4%	10.5	67.9x	10.9x
Paper & Printing	10,925	10,613	+311.53	+2.94%	6	39,990	0.9%	501.2	3.0%	NM	2.8x	BRACBANK	57,619	1.3%	39.0	11.3x	1.0x
Tannery	3,149	3,132	+16.82	+0.54%	6	33,631	0.7%	1,151.5	6.9%	35.4x	3.2x	ISLAMIBANK	52,486	1.2%	13.6	10.8x	0.8x
Jute	9,032	8,780	+251.41	+2.86%	3	2,081	0.0%	13.3	0.1%	NM	29.4x	DUTCHBANGL	44,041	1.0%	4.8	7.6x	1.1x
Ceramics	747	736	+11.31	+1.54%	5	33,297	0.7%	271.1	1.6%	31.2x	2.0x	TITASGAS	41,844	0.9%	114.4	12.5x	0.6x
Miscellaneous	4,266	4,253	+12.65	+0.30%	15	236,549	5.2%	1,697.7	10.2%	11.5x	2.0x	POWERGRID	37,418	0.8%	68.8	10.2x	0.4x
Bond**	89	90	-0.72	-0.80%	9	36,975	0.8%	12.6	0.1%	NM	NM	BSCCL	37,137	0.8%	46.6	16.1x	3.3x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	220.0	+10.0%	167.8	NM	16.2x
NHFIL	49.5	+10.0%	215.7	21.8x	2.7x
DELTA LIFE	155.3	+10.0%	598.3	NM	NM
MEGHNALIFE	70.5	+10.0%	34.6	NM	NM
GQBALLPEN	119.1	+10.0%	55.5	NM	0.9x
EHL	73.0	+9.9%	402.5	14.8x	1.0x
HAKKANIPUL	69.8	+9.9%	52.3	NM	3x
METROSPIN	38.8	+9.9%	93.9	27.4x	1.9x
RSRMSTEEL	21.1	+9.9%	31.0	NM	0.5x
PHOENIXFIN	20.4	+9.7%	80.9	17.3x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONARGAON	71.5	-3.6%	52.6	NM	6.3x
CENTRALPHL	14.1	-3.4%	32.3	NM	2x
EMERALDOIL	36.7	-3.2%	29.9	NM	2.3x
SALAMCRST	35.3	-2.5%	25.0	88.3x	1.9x
SAFKOSPINN	30.1	-2.3%	43.9	6.3x	1.4x
DULAMIACOT	71.3	-2.2%	1.5	NM	NM
BDTHAIFOOD	37.3	-2.1%	31.9	51.2x	2.6x
FBFIF	5.3	-1.9%	14.1	NM	0.6x
TOSRIFA	27.1	-1.8%	41.7	25.9x	0.9x
IFIC1STMF	5.5	-1.8%	9.5	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	122,484	7.4%	10.1x	1.9x
BATBC	75,371	4.5%	18.1x	7.4x
RENATA	68,071	4.1%	25.2x	4.9x
BEXIMCO	67,615	4.1%	7.3x	1.4x
BXPBARMA	46,281	2.8%	12.7x	1.8x
BEACONPHAR	39,924	2.4%	67.9x	10.9x
GP	39,739	2.4%	11.4x	7.7x
BRACBANK	31,056	1.9%	11.3x	1.0x
LHBL	27,032	1.6%	22.3x	4.9x
EBL	23,882	1.4%	7.6x	1.0x
ISLAMIBANK	23,577	1.4%	10.8x	0.8x
NBL	19,113	1.2%	NM	0.5x
PUBALIBANK	18,173	1.1%	5.5x	0.7x
CITYBANK	17,615	1.1%	4.6x	0.7x
ROBI	15,714	0.9%	NM	2.4x
OLYMPIC	15,071	0.9%	18.5x	3.0x
ALARABANK	14,609	0.9%	12.0x	1.1x
BSRMLTD	14,479	0.9%	5.1x	0.7x
UPGDCL	13,611	0.8%	11.3x	4.2x
SUMITPOWER	13,476	0.8%	8.7x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONPHARM	108.9	+7.8%	1,084.2	26.5x	1.3x
FORTUNE	80.2	+0.9%	1,078.9	26.3x	5.3x
BEXIMCO	119.1	-	978.0	7.3x	1.4x
IPDC	76.2	+8.7%	639.7	31.0x	4.5x
DELTA LIFE	155.3	+10.0%	598.3	NM	NM
LHBL	74.9	+0.8%	412.7	22.3x	4.9x
EHL	73.0	+9.9%	402.5	14.8x	1.0x
SAPORTL	36.6	+7.6%	329.1	31.7x	1.1x
MALEKSPIN	36.5	+3.4%	275.3	8.4x	0.8x
MAKSONSPIN	27.6	+1.1%	274.5	7.9x	1.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIBANK	35.0	35.0	6.0	19,665	688.27
INTRACO	40.2	38.0	15.0	2,405	91.77
IPDC	73.3	64.9	7.0	581	39.92
ORIONPHARM	110.1	91.0	8.0	331	33.84
LHBL	80.5	76.5	3.0	417	33.46
SONALIPAPR	720.0	720.0	1.0	43	30.78
BRACBANK	38.5	38.5	5.0	693	26.68
ORIONINFU	216.0	200.0	7.0	118	24.54
MARICO	2,440.0	2,440.0	4.0	10	24.40
SUNLIFEINS	63.0	61.9	5.0	308	19.30

\*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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ISLAMIBANK	35.0	35.0	688.3	19,665	6
INTRACO	40.2	38.0	91.8	2,405	15
IPDC	73.3	64.9	39.9	581	7
ORIONPHARM	110.1	91.0	33.8	331	8
LHBL	80.5	76.5	33.5	417	3
SONALIPAPR	720.0	720.0	30.8	43	1
BRACBANK	38.5	38.5	26.7	693	5
ORIONINFU	216.0	200.0	24.5	118	7
MARICO	2,440.0	2,440.0	24.4	10	4
SUNLIFEINS	63.0	61.9	19.3	308	5
PRIMEINSUR	82.8	82.8	14.9	180	8
METROSPIN	37.8	33.2	10.8	313	8
NEWLIN	45.1	45.1	8.0	178	1
GSPFINANCE	34.0	32.6	7.9	233	3
FEKDIL	21.5	21.4	7.8	365	3
AL-HAJTEX	138.0	134.0	6.4	47	3
SQRPHARMA	212.0	211.7	6.4	30	3
BSC	128.0	128.0	5.3	42	1
SONARGAON	72.0	71.5	5.2	73	2
BNICL	60.2	60.2	5.0	83	1
CRYSTALINS	38.5	38.5	3.2	83	1
SKICL	50.9	50.9	2.6	52	1
<b>Total</b>			<b>1,135.7</b>		<b>136</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
City Bank Perpetual Bond	-	0.0%	9.6%	Record Date	29-Aug-22
Sonali Life Insurance Company Limited	-	0.0%	13.0%	Record Date	31-Aug-22
Walton Hi-Tech Industries PLC	-	0.0%	250.0%	Record Date	04-Sep-22
GSP Finance Company (Bangladesh) Limited	-	7.5%	2.5%	Record Date	04-Sep-22
SEML Lecture Equity Management Fund	-	0.0%	5.0%	Record Date	04-Sep-22
Sunlife Insurance Company Limited	-	0.0%	0.0%	Record Date	04-Sep-22
SEML IBBL Shariah Fund	-	0.0%	6.0%	Record Date	04-Sep-22
SEML FBLSL Growth Fund	-	0.0%	15.0%	Record Date	04-Sep-22
ICB AMCL Second Mutual Fund	-	0.0%	6.0%	Record Date	05-Sep-22
ICB Employees Provident MF 1: Scheme 1	-	0.0%	5.0%	Record Date	05-Sep-22
Prime Bank 1st ICB AMCL Mutual Fund	-	0.0%	5.0%	Record Date	05-Sep-22
Phoenix Finance 1st Mutual Fund	-	0.0%	5.0%	Record Date	05-Sep-22
ICB AMCL Third NRB Mutual Fund	-	0.0%	5.0%	Record Date	05-Sep-22
IFIL Islamic Mutual Fund-1	-	0.0%	4.0%	Record Date	05-Sep-22
ICB AMCL Sonali Bank Limited 1st Mutual Fund	-	0.0%	5.0%	Record Date	05-Sep-22
ICB AMCL First Agrani Bank Mutual Fund	-	0.0%	9.0%	Record Date	05-Sep-22
Green Delta Mutual Fund	-	0.0%	7.0%	Record Date	05-Sep-22

**Important DSE News**
**UPGDCL**

The Company has informed that the Board of Directors of the company has approved the Scheme of amalgamation of (i) United Anwara Power Ltd. (ii) United Energy Ltd. and (iii) United Jamalpur Power Ltd. ("Collectively the Transferor Companies") with United Power Generation & Distribution Co. Ltd. (UPGDCL), whereby, UPGDCL will merge with the Transferor Companies, and UPGDCL shall be the surviving entity. The above approval by the Board of Directors is subject to sanction of the Scheme by the Honorable High Court Division of the Supreme Court of Bangladesh in accordance with the provisions of Section 228 and 229 of the Companies Act, 1994 and compliance of all related regulatory requirements including approval of the same Scheme by the members of "Transferor Companies" and United Power Generation and Distribution Company Limited and also requisite approval of the Banks and other Creditors.

**WALTONHIL**

Referring to the BSEC letter No. BSEC/SRMIC/160-2020(Part-I)/200 dated May 22, 2022, S. M. Ashrafic Alam, one of the Sponsor Directors of the Company, has expressed his intention to sell 1,00,000 shares out of his holding 6,60,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

**PRIMEBANK**

The Company has further informed that 2,80,38,000 shares of Late Mrs. Marina Yasmin Chowdhury, one of the Sponsor Directors of the company, have been transmitted to her nominee Mr. Azam J Chowdhury (Spouse and Nominated Director of the Company), by way of nomination as news disseminated on 22.08.2022.

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