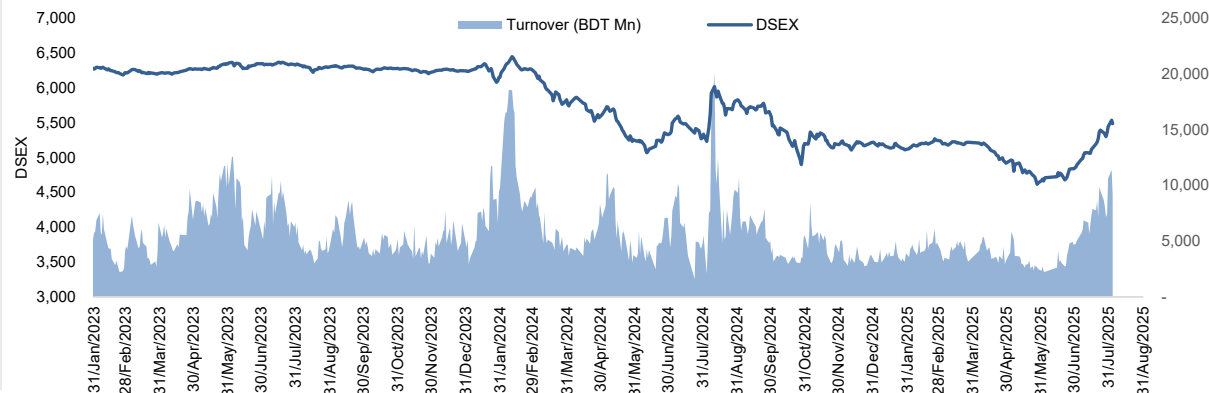


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.91%) lost 50.23 points and closed at 5,485.91. The blue-chip index DS30 (-0.95%), the Shariah-based index DSES (-0.68%), and the large-cap index CDSET (-1.02%) closed at 2,129.93, 1,185.49, and 1,132.55 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.82% followed by NBFI (-1.28%), Food & Allied (-1.23%), Engineering (-0.60%), Telecommunication (-0.45%), Pharmaceutical (-0.34%), and Fuel & Power (+1.65%), respectively. Block trades contributed 1.3% of the overall market turnover. Jamuna Bank Ltd. (+0.9%) was the most traded share with a turnover of BDT 317 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,485.91	5,536.14	-50.23	-0.91%	+5.2%
DS30	2,129.93	2,150.46	-20.53	-0.95%	+9.8%
DSES	1,185.49	1,193.56	-8.07	-0.68%	+1.4%
CDSET	1,132.55	1,144.22	-11.67	-1.02%	+6.2%

	Advanced	Declined	Unchanged	Total
All Category	122	207	68	397
A Category (Equity)	66	119	34	219
B Category (Equity)	32	42	8	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	24	46	26	96
Mutual Funds	8	10	18	36
Corporate Bonds	0	1	2	3
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,146,622	7,173,449	-0.4%
	Mn USD	58,579	58,799	
Turnover	Mn BDT	9,117	11,374	-19.8%
	Mn USD	75	93	
Volume	Mn Shares	328	444	-26.2%
No. of Trade		237,927	264,502	-10.0%

* Average Interbank Exchange Rate is BDT 122.00 as of Aug 04, 2025

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Figure: Sectorial Turnover (BDT Mn)

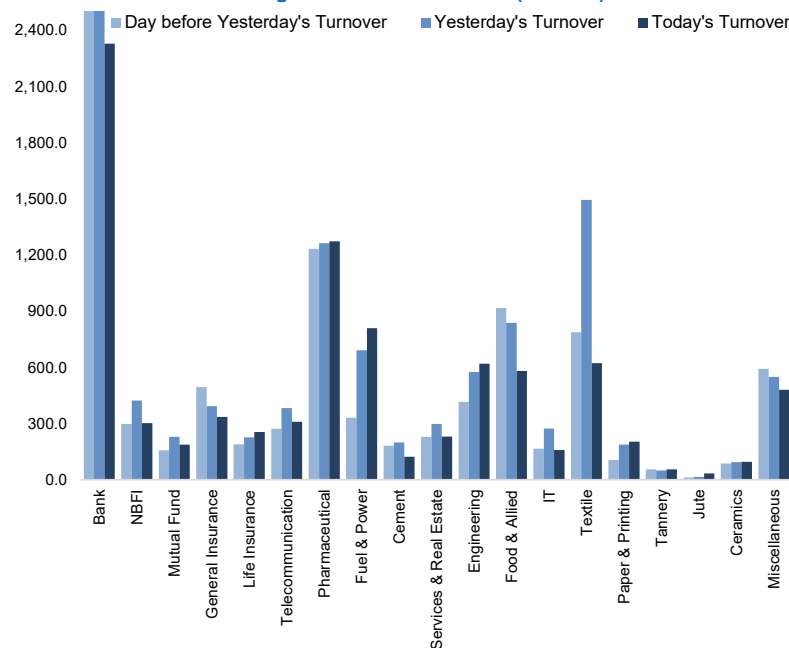
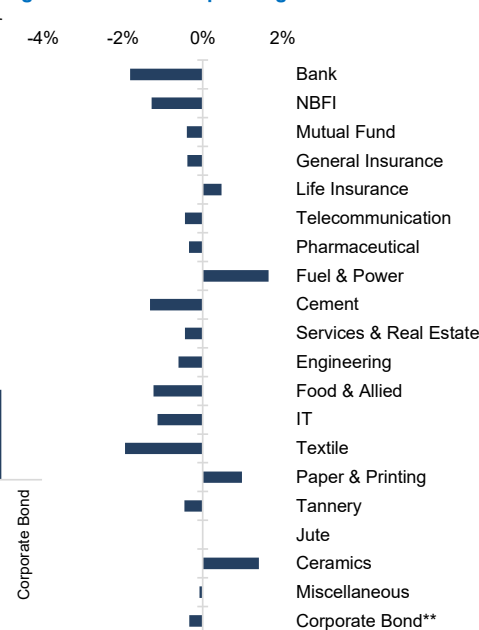


Figure: Sectorial Mcap Change



Market PE 16.6x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK 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	1,610	1,640	-29.78	-1.82%	36	761,984	10.7%	2,328.0	25.9%	NM	0.8x	GP	428,315	11.5%	57.0	14.6x	7.5x
NBFI	1,118	1,133	-14.49	-1.28%	23	106,566	1.5%	301.9	3.4%	NM	NM	SQURPHARMA	204,061	5.5%	134.8	8.7x	1.5x
Mutual Fund	618	621	-2.46	-0.40%	37	29,641	0.4%	186.9	2.1%	NM	0.6x	BATBC	162,000	4.4%	100.4	13.1x	3.0x
General Insurance	2,768	2,778	-10.68	-0.38%	43	78,984	1.1%	335.2	3.7%	13.3x	1.2x	ROBI	146,138	3.9%	132.8	16.8x	2.3x
Life Insurance	1,810	1,802	+8.44	+0.47%	15	48,140	0.7%	254.9	2.8%	NM	NM	BRACBANK	139,166	3.7%	169.5	9.8x	1.6x
Telecommunication	5,152	5,175	-23.11	-0.45%	3	604,137	8.4%	309.5	3.4%	15.3x	4.4x	WALTONHIL	137,136	3.7%	8.8	10.6x	1.2x
Pharmaceutical	3,140	3,151	-10.77	-0.34%	34	595,353	8.3%	1,272.1	14.1%	13.7x	1.6x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,193	1,173	+19.38	+1.65%	23	315,977	4.4%	808.8	9.0%	20.0x	0.7x	MARICO	94,109	2.5%	22.2	15.4x	28.2x
Cement	2,158	2,187	-28.93	-1.32%	7	102,859	1.4%	122.3	1.4%	23.7x	2.3x	UPGDCL	82,375	2.2%	47.9	7.1x	2.0x
Services & Real Estate	1,000	1,004	-4.48	-0.45%	9	54,983	0.8%	230.3	2.6%	25.3x	0.4x	ISLAMIBANK	77,924	2.1%	83.3	16.7x	1.1x
Engineering	2,534	2,549	-15.40	-0.60%	42	285,845	4.0%	619.4	6.9%	13.5x	0.9x	LHB	69,566	1.9%	64.6	18.5x	3.7x
Food & Allied	15,337	15,529	-191.41	-1.23%	21	280,631	3.9%	580.3	6.4%	21.2x	4.4x	RENATA	58,575	1.6%	38.2	20.8x	1.7x
IT	1,858	1,879	-21.21	-1.13%	11	24,505	0.3%	158.1	1.8%	20.6x	1.5x	BXPHARMA	51,794	1.4%	190.5	8.1x	1.0x
Textile	1,109	1,131	-21.98	-1.94%	58	115,470	1.6%	622.1	6.9%	NM	0.8x	UNILEVERCL	48,490	1.3%	2.9	76.3x	26.6x
Paper & Printing	4,468	4,424	+43.41	+0.98%	6	20,185	0.3%	203.5	2.3%	NM	1.0x	DUTCHBANGL	43,888	1.2%	22.7	11.7x	0.8x
Tannery	2,013	2,022	-9.30	-0.46%	6	22,430	0.3%	55.2	0.6%	NM	1.7x	ICB	42,929	1.2%	14.8	NM	1.0x
Jute	11,893	11,894	-1.17	-0.01%	3	2,618	0.0%	33.6	0.4%	NM	NM	EBL	42,289	1.1%	58.8	6.1x	1.0x
Ceramics	417	411	+5.79	+1.41%	5	18,688	0.3%	95.6	1.1%	NM	1.2x	PUBALIBANK	39,824	1.1%	98.1	5.4x	0.7x
Miscellaneous	4,168	4,171	-3.35	-0.08%	15	226,344	3.2%	480.3	5.3%	86.4x	1.8x	CITYBANK	38,639	1.0%	297.7	3.6x	0.7x
Corporate Bond**	14,969	15,020	-50.28	-0.33%	16	33,049	0.5%	0.2	0.0%	NM	NM	OLYMPIC	34,290	0.9%	119.7	18.5x	2.8x
Treasury Bond**	2,167	2,167	+0.47	+0.02%	235	3,424,427	47.9%	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
TITASGAS	23.0	+9.5%	63.0	NM	0.3x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	JAMUNABANK	21.4	+0.9%	316.5	7.4x	0.9x
SPCERAMICS	21.0	+7.7%	53.9	NM	0.7x	ISLAMIBANK	74,730	5.3%	16.7x	1.1x	BSC	119.5	+1.0%	310.1	6.1x	1.2x
ACTIVEFINE	9.1	+7.1%	6.3	NM	0.4x	BEXIMCO	69,463	4.9%	NM	1.3x	CITYBANK	25.4	-0.4%	297.7	3.6x	0.7x
BDTHAIFOOD	15.4	+6.9%	45.4	NM	1.1x	BATBC	50,233	3.6%	13.1x	3.0x	ORIONINFU	368.1	+3.4%	258.2	NM	23.4x
SAMATALETH	78.1	+6.5%	25.8	NM	5.4x	WALTONHIL	46,773	3.3%	10.6x	1.2x	UTTARABANK	22.0	-3.1%	194.3	NM	0.8x
PRIMEINSUR	37.2	+5.98%	20.2	20.2x	1.6x	BRACBANK	46,489	3.3%	9.8x	1.6x	BXPHARMA	116.1	-1.9%	190.5	8.1x	1.0x
BSCPLC	158.7	+5.9%	119.7	22.7x	2x	GP	44,708	3.2%	14.6x	7.5x	BANKASIA	19.6	-	172.9	10.8x	0.7x
ICBAGRANI1	7.7	+5.5%	2.9	NM	1.0x	RENATA	32,968	2.3%	20.8x	1.7x	BRACBANK	69.9	-	169.5	9.8x	1.6x
SALAMCRST	20.4	+5.2%	25.9	NM	1.1x	BXPHARMA	23,409	1.7%	8.1x	1.0x	MALEKSPIN	28.0	-3.4%	142.2	3.8x	0.5x
INDEXAGRO	72.1	+4.8%	19.7	12.9x	0.9x	PUBALIBANK	22,905	1.6%	5.4x	0.7x	TRUSTBANK	21.3	-9.0%	138.9	NM	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.6x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
TRUSTBANK	21.3	-9.0%	138.9	NM	0.7x	LHB	20,953	1.5%	18.5x	3.7x	GQBALLPEN	239.0	239.0	1.0	100	23.90
CNATEX	3.2	-5.9%	1.5	NM	NM	OLYMPIC	20,496	1.5%	18.5x	2.8x	CITYGENINS	50.0	48.0	10.0	450	21.69
SBACBANK	8.6	-5.5%	9.8	5.8x	0.6x	ALARABANK	18,282	1.3%	40.1x	0.9x	TILIL	54.0	49.8	7.0	386	20.32
FAREASTFIN	3.6	-5.3%	0.1	NM	NM	BEACONPHAR	17,838	1.3%	30.5x	4.1x	BSRMLTD	91.2	91.2	1.0	125	11.41
UCB	11.0	-5.2%	40.1	4.5x	0.4x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	ORIONINFU	351.5	351.1	2.0	27	9.60
NRBBANK	9.4	-5.1%	51.2	NM	0.8x	ROBI	14,876	1.1%	16.8x	2.3x	CLICL	49.1	49.1	1.0	100	4.91
FIRSTSBANK	3.9	-4.9%	12.4	NM	1.6x	UTTARABANK	13,699	1.0%	NM	0.8x	BERGERPBL	1,570.0	1,570.0	1.0	2	3.85
MERCANBANK	10.1	-4.7%	46.9	24.0x	0.4x	NBL	13,055	0.9%	NM	NM	RELANCE1	18.0	18.0	2.0	200	3.60
ONEBANKPLC	8.6	-4.4%	51.5	9.1x	0.4x	BSRMLTD	12,852	0.9%	5.4x	0.6x	ORIONPHARM	31.9	31.9	2.0	89	2.83
METROSPIN	11.4	-4.2%	0.4	NM	2.4x	* 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					STANDBANKL	7.9	7.9	2.0	350	2.77

* 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	Important DSE News
GQBALLPEN	239.0	239.0	23.9	100	1	
CITYGENINS	50.0	48.0	21.7	450	10	
TILIL	54.0	49.8	20.3	386	7	
BSRMLTD	91.2	91.2	11.4	125	1	
ORIONINFU	351.5	351.1	9.6	27	2	
CLICL	49.1	49.1	4.9	100	1	
BERGERPBL	1,570.0	1,570.0	3.9	2	1	
RELIANCE1	18.0	18.0	3.6	200	2	
ORIONPHARM	31.9	31.9	2.8	89	2	
STANDBANKL	7.9	7.9	2.8	350	2	
IFIC	6.9	6.9	2.1	300	1	
SEMLLECMF	8.5	8.5	1.7	200	1	
LOVELLO	98.0	98.0	1.5	15	1	
KAY&QUE	270.0	270.0	1.2	5	1	
AMANFEED	24.7	24.7	1.2	49	1	
BSC	115.0	115.0	1.2	10	1	
SQURPHARMA	215.0	215.0	0.9	4	1	
BRACBANK	69.7	69.7	0.9	13	1	
RDFOOD	24.3	24.3	0.7	30	1	
SIBL	9.1	9.1	0.7	75	1	
SUNLIFEINS	55.0	55.0	0.6	10	1	
QUASEMIND	41.3	41.3	0.5	13	1	
Total			119.0		43	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PRIMELIFE		0.0%	0.0%	Record Date	4-Aug-25
DHAKABANK		5.0%	0.0%	Record Date	7-Aug-25
FASFIN		0.0%	0.0%	Record Date	10-Aug-25
GP		0.0%	110.0%	Record Date	13-Aug-25
NATLIFEINS		0.0%	35.0%	Record Date	17-Aug-25
PRAGATILIF		0.0%	15.0%	Record Date	19-Aug-25
MARICO		0.0%	600.0%	Record Date	21-Aug-25
CAPITECGBF		0.0%	3.3%	Record Date	24-Aug-25
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-25

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