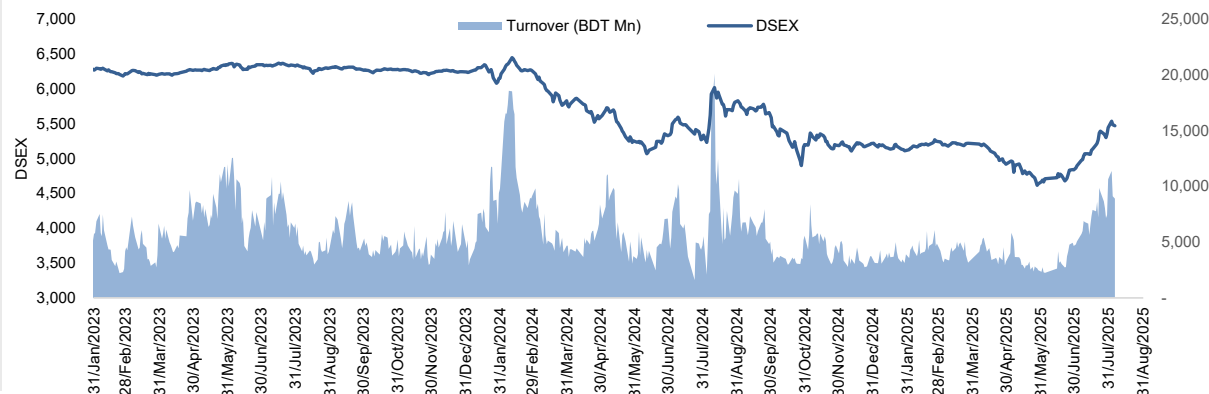


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.27%) lost 14.75 points and closed at 5,471.16. The blue-chip index DS30 (-0.21%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (-0.50%) closed at 2,125.51, 1,183.94, and 1,126.89 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.73% followed by NBFI (-1.61%), Fuel & Power (-0.39%), Telecommunication (-0.33%), Food & Allied (-0.21%), Engineering (+0.08%), and Pharmaceutical (+0.16%), respectively. Block trades contributed 3.3% of the overall market turnover. The City Bank Ltd. (-2.8%) was the most traded share with a turnover of BDT 452 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 5,471.16 | 5,485.91 | -14.75  | -0.27% | +4.9%  |
| DS30  | 2,125.51 | 2,129.93 | -4.41   | -0.21% | +9.6%  |
| DSES  | 1,183.94 | 1,185.49 | -1.56   | -0.13% | +1.3%  |
| CDSET | 1,126.89 | 1,132.55 | -5.66   | -0.50% | +5.7%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 154      | 184      | 62        | 400   |
| A Category (Equity) | 87       | 108      | 26        | 221   |
| B Category (Equity) | 37       | 37       | 8         | 82    |
| N Category (Equity) | 0        | 0        | 1         | 1     |
| Z Category (Equity) | 30       | 39       | 27        | 96    |
| Mutual Funds        | 4        | 18       | 14        | 36    |
| Corporate Bonds     | 2        | 0        | 2         | 4     |
| Treasury Bonds      | 1        | 1        | 0         | 2     |

\* Based on Traded Scrips

|              |           | Today     | Last Day  | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap         | Mn BDT    | 7,131,513 | 7,146,622 | -0.2%    |
|              | Mn USD    | 58,484    | 58,608    |          |
| Turnover     | Mn BDT    | 8,900     | 9,117     | -2.4%    |
|              | Mn USD    | 73        | 75        |          |
| Volume       | Mn Shares | 286       | 328       | -12.6%   |
| No. of Trade |           | 225,960   | 237,927   | -5.0%    |

\* Average Interbank Exchange Rate is BDT 121.94 as of Aug 06, 2025

|   |  |
|---|--|
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|---|--|

Figure: Sectorial Turnover (BDT Mn)

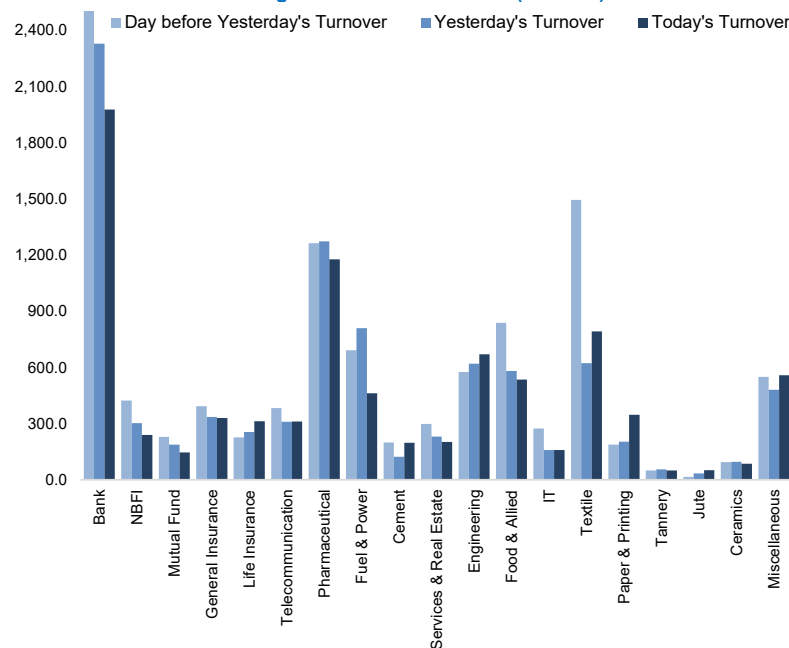
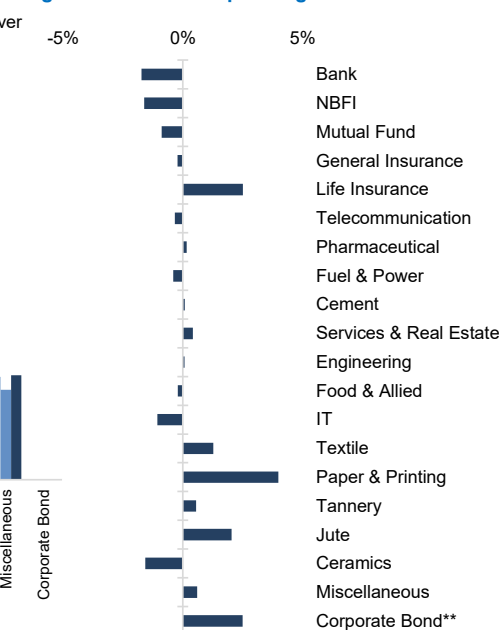


Figure: Sectorial Mcap Change



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                   | 1,583   | 1,610   | -27.81   | -1.73% | 36               | 748,827       | 10.5%           | 1,976.6           | 23.0%               | NM    | 0.8x | GP                    | 428,045       | 11.6%           | 98.8              | 14.5x | 7.5x  |
| NBFI                   | 1,100   | 1,118   | -18.01   | -1.61% | 23               | 104,849       | 1.5%            | 238.9             | 2.8%                | NM    | NM   | SQURPHARMA            | 204,504       | 5.5%            | 138.3             | 8.7x  | 1.5x  |
| Mutual Fund            | 613     | 618     | -5.48    | -0.89% | 37               | 29,378        | 0.4%            | 145.3             | 1.7%                | NM    | 0.6x | BATBC                 | 161,568       | 4.4%            | 55.8              | 13.0x | 3.0x  |
| General Insurance      | 2,761   | 2,768   | -6.19    | -0.22% | 43               | 78,807        | 1.1%            | 329.4             | 3.8%                | 13.2x | 1.2x | ROBI                  | 144,567       | 3.9%            | 93.6              | 16.6x | 2.2x  |
| Life Insurance         | 1,855   | 1,810   | +45.47   | +2.51% | 15               | 49,349        | 0.7%            | 312.4             | 3.6%                | NM    | NM   | BRACBANK              | 137,573       | 3.7%            | 331.2             | 9.7x  | 1.6x  |
| Telecommunication      | 5,135   | 5,152   | -17.14   | -0.33% | 3                | 602,127       | 8.4%            | 311.1             | 3.6%                | 15.3x | 4.4x | WALTONHIL             | 137,529       | 3.7%            | 8.4               | 10.7x | 1.2x  |
| Pharmaceutical         | 3,145   | 3,140   | +5.03    | +0.16% | 34               | 596,307       | 8.4%            | 1,177.0           | 13.7%               | 13.7x | 1.7x | BEXIMCO               | 103,850       | 2.8%            | 0.0               | NM    | 1.3x  |
| Fuel & Power           | 1,188   | 1,193   | -4.69    | -0.39% | 23               | 314,733       | 4.4%            | 462.0             | 5.4%                | 19.9x | 0.7x | MARICO                | 93,772        | 2.5%            | 81.6              | 15.3x | 28.1x |
| Cement                 | 2,160   | 2,158   | +1.84    | +0.09% | 7                | 102,947       | 1.4%            | 197.8             | 2.3%                | 23.7x | 2.3x | UPGDCL                | 82,491        | 2.2%            | 20.1              | 7.1x  | 2.0x  |
| Services & Real Estate | 1,004   | 1,000   | +4.25    | +0.43% | 9                | 55,217        | 0.8%            | 201.3             | 2.3%                | 25.4x | 0.4x | BERGERPBL             | 77,052        | 2.1%            | 8.5               | 21.9x | 4.5x  |
| Engineering            | 2,536   | 2,534   | +1.92    | +0.08% | 42               | 286,062       | 4.0%            | 669.1             | 7.8%                | 13.5x | 0.9x | LHB                   | 69,102        | 1.9%            | 97.9              | 18.4x | 3.6x  |
| Food & Allied          | 15,305  | 15,337  | -31.99   | -0.21% | 21               | 280,045       | 3.9%            | 535.0             | 6.2%                | 21.2x | 4.4x | RENATA                | 58,013        | 1.6%            | 60.7              | 20.6x | 1.7x  |
| IT                     | 1,838   | 1,858   | -19.77   | -1.06% | 11               | 24,245        | 0.3%            | 158.7             | 1.8%                | 20.4x | 1.5x | BXPHARMA              | 52,686        | 1.4%            | 165.6             | 8.2x  | 1.1x  |
| Textile                | 1,123   | 1,109   | +14.10   | +1.27% | 58               | 116,938       | 1.6%            | 791.7             | 9.2%                | NM    | 0.8x | UNILEVERCL            | 48,286        | 1.3%            | 0.9               | 76.0x | 26.5x |
| Paper & Printing       | 4,646   | 4,468   | +178.09  | +3.99% | 6                | 20,990        | 0.3%            | 347.4             | 4.0%                | NM    | 1.0x | DUTCHBANGL            | 43,405        | 1.2%            | 13.2              | 11.6x | 0.8x  |
| Tannery                | 2,024   | 2,013   | +11.09   | +0.55% | 6                | 22,553        | 0.3%            | 49.0              | 0.6%                | NM    | 1.7x | ICB                   | 42,236        | 1.1%            | 8.6               | NM    | 1.0x  |
| Jute                   | 12,136  | 11,893  | +242.56  | +2.04% | 3                | 2,671         | 0.0%            | 51.6              | 0.6%                | NM    | NM   | EBL                   | 41,332        | 1.1%            | 35.5              | 5.9x  | 0.9x  |
| Ceramics               | 410     | 417     | -6.54    | -1.57% | 5                | 18,394        | 0.3%            | 85.0              | 1.0%                | NM    | 1.2x | PUBALIBANK            | 40,214        | 1.1%            | 54.9              | 5.5x  | 0.7x  |
| Miscellaneous          | 4,193   | 4,168   | +25.02   | +0.60% | 15               | 227,703       | 3.2%            | 558.2             | 6.5%                | 86.9x | 1.8x | CITYBANK              | 37,574        | 1.0%            | 451.9             | 3.5x  | 0.7x  |
| Corporate Bond**       | 15,344  | 14,969  | +374.12  | +2.50% | 16               | 33,875        | 0.5%            | 2.8               | 0.0%                | NM    | NM   | OLYMPIC               | 34,030        | 0.9%            | 83.4              | 18.4x | 2.8x  |
| Treasury Bond**        | 2,167   | 2,167   | -0.36    | -0.02% | 235              | 3,422,076     | 47.9%           | 1.4               | 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                |
|-----------------|-------------------|--------|-------------------|-------|-------|--|--------------------------|----------------------------|-------|------|-------------------|---------------------|---------------------|-------------------|-----------------|-------------------|
| PRAGATILIF      | 116.3             | +9.2%  | 40.9              | NM    | NM    | SQURPHARMA   | 108,958                  | 7.7%                       | 8.7x  | 1.5x | CITYBANK          | 24.7                | -2.8%               | 451.9             | 3.5x            | 0.7x              |
| MALEKSPIN       | 30.4              | +8.6%  | 219.7             | 4.1x  | 0.5x  | ISLAMIBANK   | 74,730                   | 5.3%                       | 16.0x | 1.0x | BSC               | 124.4               | +4.1%               | 355.9             | 6.3x            | 1.3x              |
| RAHIMAFOOD      | 159.5             | +8.5%  | 107.4             | NM    | 17.4x | BEXIMCO  | 69,463                   | 4.9%                       | NM    | 1.3x | BRACBANK          | 69.1                | -1.1%               | 331.2             | 9.7x            | 1.6x              |
| WATACHEM        | 134.1             | +7.5%  | 19.2              | NM    | 2.2x  | BATBC  | 50,233                   | 3.6%                       | 13.0x | 3.0x | MALEKSPIN         | 30.4                | +8.6%               | 219.7             | 4.1x            | 0.5x              |
| INDEXAGRO       | 77.1              | +6.9%  | 27.3              | 13.7x | 0.9x  | WALTONHIL  | 46,773                   | 3.3%                       | 10.7x | 1.2x | JAMUNABANK        | 21.3                | -0.5%               | 210.3             | 7.4x            | 0.9x              |
| STANDARINS      | 45.7              | +6.28% | 9.1               | 19.4x | 2.0x  | BRACBANK   | 46,489                   | 3.3%                       | 9.7x  | 1.6x | BXPHARMA          | 118.1               | +1.7%               | 165.6             | 8.2x            | 1.1x              |
| DSHGARME        | 120.2             | +6.2%  | 24.3              | NM    | 7x    | GP   | 44,708                   | 3.2%                       | 14.5x | 7.5x | UTTARABANK        | 21.6                | -1.8%               | 160.4             | NM              | 0.8x              |
| SONALIPAPR      | 177.5             | +6.1%  | 101.8             | 17.2x | 1.1x  | RENATA   | 32,968                   | 2.3%                       | 20.6x | 1.7x | ORIONINFU         | 377.3               | +2.5%               | 139.6             | NM              | 24.0x             |
| MONOSPOOL       | 110.1             | +6.1%  | 73.1              | 30.0x | 2.5x  | BXPHARMA   | 23,409                   | 1.7%                       | 8.2x  | 1.1x | SQURPHARMA        | 230.7               | +0.2%               | 138.3             | 8.7x            | 1.5x              |
| KTL             | 12.6              | +5.9%  | 50.1              | NM    | 0.8x  | PUBALIBANK   | 22,905                   | 1.6%                       | 5.5x  | 0.7x | BSCPLC            | 157.8               | -0.6%               | 118.7             | 22.5x           | 1.8x              |
|                 |                   |        |                   |       |       |  |                          |                            |       |      |                   |                     |                     |                   |                 |                   |
| Top Ten Losers  | Close Price (BDT) | Δ%     | Turnover (BDT Mn) | PE    | PB    | CITYBANK   | 21,020                   | 1.5%                       | 3.5x  | 0.7x | Block Trade       | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade      | Quantity ('000) | Turnover (BDT Mn) |
| FAREASTLIF      | 28.2              | -5.1%  | 2.0               | NM    | NM    | LHB  | 20,953                   | 1.5%                       | 18.4x | 3.6x | TRUSTBANK         | 21.5                | 21.1                | 35.0              | 2,557           | 54.46             |
| DOMINAGE        | 12.6              | -4.5%  | 41.1              | 90.0x | 1x    | OLYMPIC  | 20,496                   | 1.5%                       | 18.4x | 2.8x | CITYGENINS        | 48.6                | 47.9                | 15.0              | 1,102           | 52.96             |
| BAYLEASING      | 4.6               | -4.2%  | 0.3               | NM    | NM    | ALARABANK  | 18,282                   | 1.3%                       | 39.5x | 0.8x | BRACBANK          | 75.1                | 69.0                | 2.0               | 616             | 42.60             |
| STANDBANKL      | 7.2               | -4.0%  | 36.0              | 9.6x  | 0.4x  | BEACONPHAR   | 17,838                   | 1.3%                       | 30.4x | 4.1x | LHB               | 63.5                | 63.5                | 1.0               | 452             | 28.69             |
| ISLAMIBANK      | 46.5              | -3.9%  | 60.1              | 16.0x | 1.0x  | PRIMEBANK  | 16,142                   | 1.1%                       | 3.9x  | 0.8x | TILIL             | 55.1                | 54.5                | 9.0               | 494             | 27.11             |
| SOUTHEASTB      | 10.1              | -3.8%  | 38.4              | 26.1x | 0.4x  | ROBI   | 14,876                   | 1.1%                       | 16.6x | 2.2x | ORIONINFU         | 372.0               | 350.2               | 4.0               | 48              | 16.91             |
| GENNEXT         | 2.6               | -3.7%  | 0.8               | NM    | 0.2x  | UTTARABANK   | 13,699                   | 1.0%                       | NM    | 0.8x | HAMI              | 87.5                | 87.5                | 2.0               | 150             | 13.13             |
| NHFIL           | 25.2              | -3.4%  | 36.6              | NM    | 1.4x  | NBL  | 13,055                   | 0.9%                       | NM    | NM   | ENVOYTEX          | 43.0                | 42.5                | 2.0               | 250             | 10.65             |
| PREMIERLEA      | 2.9               | -3.3%  | 0.4               | NM    | NM    | BSRMLTD  | 12,852                   | 0.9%                       | 5.3x  | 0.6x | RDFOOD            | 25.6                | 25.6                | 1.0               | 240             | 6.14              |
| SPCERAMICS      | 20.3              | -3.3%  | 34.3              | NM    | 0.7x  | * NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.<br>** The base of the Bond Index starts at 100, starting from Jan 13, 2022<br>Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022 |                          |                            |       |      |                   |                     |                     |                   |                 |                   |

\* 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 |
|--------------|---------------------|---------------|-------------------|-----------------|--------------|
| TRUSTBANK    | 21.5                | 21.1          | 54.5              | 2,557           | 35           |
| CITYGENINS   | 48.6                | 47.9          | 53.0              | 1,102           | 15           |
| BRACBANK     | 75.1                | 69.0          | 42.6              | 616             | 2            |
| LHB          | 63.5                | 63.5          | 28.7              | 452             | 1            |
| TILIL        | 55.1                | 54.5          | 27.1              | 494             | 9            |
| ORIONINFU    | 372.0               | 350.2         | 16.9              | 48              | 4            |
| HAMI         | 87.5                | 87.5          | 13.1              | 150             | 2            |
| ENVOYTEX     | 43.0                | 42.5          | 10.7              | 250             | 2            |
| RDFOOD       | 25.6                | 25.6          | 6.1               | 240             | 1            |
| GOLDENSON    | 12.5                | 12.5          | 5.3               | 420             | 3            |
| UTTARABANK   | 23.2                | 23.2          | 4.6               | 200             | 1            |
| LOVELLO      | 82.0                | 82.0          | 3.0               | 36              | 1            |
| AOL          | 16.1                | 16.1          | 2.4               | 151             | 1            |
| SHEPHERD     | 18.0                | 18.0          | 2.3               | 128             | 2            |
| STANDBANKL   | 7.5                 | 7.5           | 2.3               | 300             | 1            |
| IFIC         | 6.9                 | 6.9           | 2.1               | 300             | 1            |
| UCB          | 11.2                | 10.9          | 2.1               | 186             | 2            |
| GQBALLPEN    | 215.0               | 215.0         | 1.9               | 9               | 1            |
| KAY&QUE      | 290.0               | 271.5         | 1.7               | 6               | 3            |
| PTL          | 49.5                | 47.0          | 1.6               | 34              | 2            |
| ACMEPL       | 16.0                | 16.0          | 1.6               | 100             | 1            |
| KBPPWBIL     | 128.7               | 105.4         | 1.6               | 14              | 2            |
| <b>Total</b> |                     |               | <b>297.7</b>      |                 | <b>111</b>   |

**Important DSE News**
**CONFIDCEM**

The company has informed that in view of the strategic objectives of the company and to meet its immediate financial obligations and exigencies, the Board of Directors of the Confidence Cement PLC. (the Company) in its meeting held on 4th August 2025 has decided to sell and transfer the Company's entire holding of ordinary shares of Confidence Cement Dhaka Limited, one of associates of the Company, in favor of Confidence Power Holdings Ltd. (CPHL), in consideration value of Tk. 1,409,751,566/- and on such terms and conditions, as per the Share Purchase Agreement between the Company and CPHL subject to prevailing laws, and regulatory requirements.

**UNITEDFIN**

The Company has been placed in 'A' category from existing 'B' category with effect from today i.e., 06.08.2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2024.

**ISLAMIBANK**

The company has informed that according to the decision of the Board of Directors of the company and the subsequent approval from Bangladesh Bank, Mr. Md. Omar Faruk Khan has been appointed as the Managing Director of the company.

**NCCBANK**

Mr. Syed Asif Nizamuddin, a Director of the Company, has further reported that he has completed his buying of 10,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated by DSE on 10.07.2025.

**Upcoming Corporate Events**

| DSE Ticker | Right Share | Dividend |        | Event       | Date      |
|------------|-------------|----------|--------|-------------|-----------|
|            |             | Stock    | Cash   |             |           |
| 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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