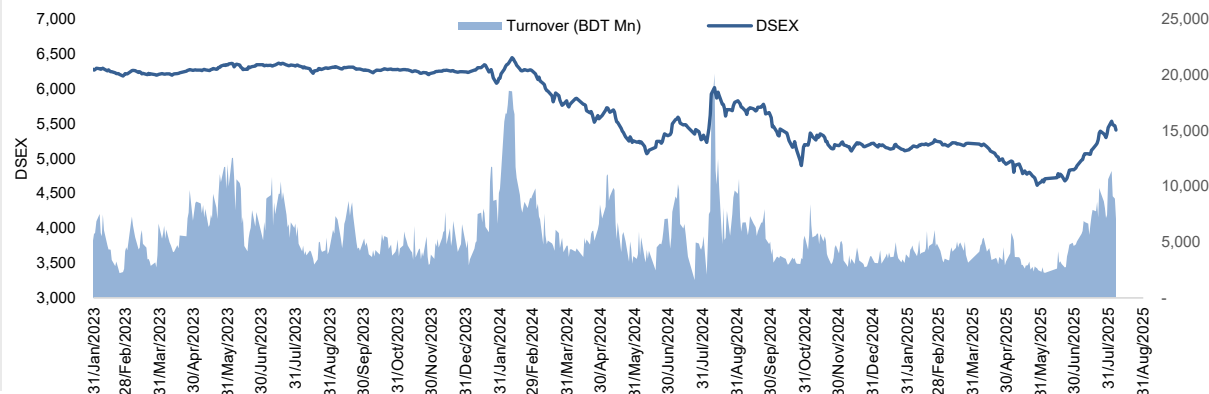


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.15%) lost 63.08 points and closed at 5,408.07. The blue-chip index DS30 (-1.31%), the Shariah-based index DSES (-1.14%), and the large-cap index CDSET (-1.27%) closed at 2,097.70, 1,170.43, and 1,112.56 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 1.90% followed by Bank (-1.76%), Engineering (-1.40%), NBFI (-1.39%), Telecommunication (-0.85%), Pharmaceutical (-0.74%), and Food & Allied (-0.62%), respectively. Block trades contributed 2.8% of the overall market turnover. Bangladesh Shipping Corporation (-3.9%) was the most traded share with a turnover of BDT 314 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,408.07	5,471.16	-63.08	-1.15%	+3.7%
DS30	2,097.70	2,125.51	-27.82	-1.31%	+8.1%
DSES	1,170.43	1,183.94	-13.50	-1.14%	+0.1%
CDSET	1,112.56	1,126.89	-14.33	-1.27%	+4.4%

	Advanced	Declined	Unchanged	Total
All Category	79	268	51	398
A Category (Equity)	38	165	17	220
B Category (Equity)	17	58	7	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	24	45	27	96
Mutual Funds	1	25	10	36
Corporate Bonds	1	0	0	1
Treasury Bonds	1	2	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,150,792	7,131,513	+0.3%
	Mn USD	58,794	58,635	
Turnover	Mn BDT	7,064	8,900	-20.6%
	Mn USD	58	73	
Volume	Mn Shares	233	286	-18.5%
No. of Trade		212,827	225,960	-5.8%

* Average Interbank Exchange Rate is BDT 121.62 as of Aug 07, 2025

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Figure: Sectorial Turnover (BDT Mn)

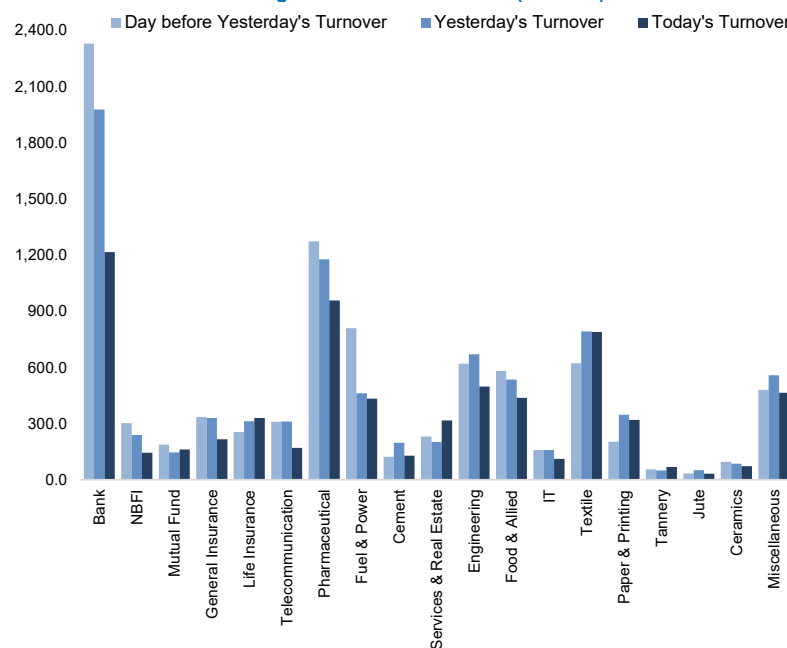
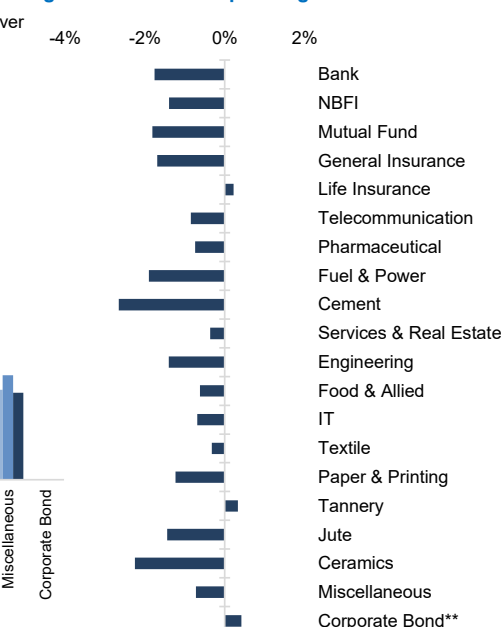


Figure: Sectorial Mcap Change



Market PE 16.4x

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	1,555	1,583	-27.86	-1.76%	36	735,646	10.3%	1,215.8	17.7%	NM	0.8x	GP	426,290	11.7%	45.2	14.5x	7.5x
NBFI	1,085	1,100	-15.31	-1.39%	23	103,390	1.4%	144.4	2.1%	NM	NM	SQURPHARMA	203,529	5.6%	119.8	8.7x	1.5x
Mutual Fund	602	613	-11.10	-1.81%	37	28,846	0.4%	160.9	2.3%	NM	0.6x	BATBC	160,380	4.4%	43.2	12.9x	3.0x
General Insurance	2,715	2,761	-46.74	-1.69%	43	77,473	1.1%	215.6	3.1%	13.0x	1.2x	ROBI	142,472	3.9%	49.7	16.4x	2.2x
Life Insurance	1,860	1,855	+4.14	+0.22%	15	49,459	0.7%	329.8	4.8%	NM	NM	BRACBANK	135,781	3.7%	129.1	9.6x	1.6x
Telecommunication	5,092	5,135	-43.53	-0.85%	3	597,023	8.3%	169.5	2.5%	15.1x	4.3x	WALTONHIL	135,318	3.7%	10.3	10.5x	1.2x
Pharmaceutical	3,122	3,145	-23.25	-0.74%	34	591,899	8.3%	957.1	13.9%	13.6x	1.6x	BEXIMCO	103,850	2.8%	0.1	NM	1.3x
Fuel & Power	1,166	1,188	-22.58	-1.90%	23	308,753	4.3%	433.0	6.3%	19.5x	0.7x	MARICO	92,339	2.5%	15.9	15.1x	27.7x
Cement	2,103	2,160	-57.40	-2.66%	7	100,212	1.4%	128.7	1.9%	23.1x	2.2x	UPGDCL	80,404	2.2%	21.0	6.9x	1.9x
Services & Real Estate	1,000	1,004	-3.68	-0.37%	9	55,015	0.8%	316.2	4.6%	25.3x	0.4x	BERGERPBL	76,129	2.1%	7.0	21.7x	4.4x
Engineering	2,500	2,536	-35.59	-1.40%	42	282,047	3.9%	496.8	7.2%	13.3x	0.9x	LHB	66,779	1.8%	69.1	17.8x	3.5x
Food & Allied	15,210	15,305	-95.09	-0.62%	21	278,305	3.9%	437.4	6.4%	21.1x	4.4x	RENATA	57,417	1.6%	29.8	20.4x	1.7x
IT	1,825	1,838	-12.68	-0.69%	11	24,077	0.3%	111.4	1.6%	20.3x	1.5x	BXPHARMA	52,061	1.4%	151.4	8.1x	1.0x
Textile	1,119	1,123	-3.62	-0.32%	58	116,561	1.6%	789.5	11.5%	NM	0.8x	UNILEVERCL	48,334	1.3%	2.1	76.1x	26.5x
Paper & Printing	4,589	4,646	-57.31	-1.23%	6	20,731	0.3%	318.9	4.6%	NM	1.0x	DUTCHBANGL	43,018	1.2%	6.1	11.5x	0.8x
Tannery	2,031	2,024	+6.73	+0.33%	6	22,628	0.3%	67.6	1.0%	NM	1.7x	ICB	41,628	1.1%	7.2	NM	1.0x
Jute	11,960	12,136	-175.32	-1.44%	3	2,633	0.0%	32.4	0.5%	NM	NM	EBL	40,853	1.1%	37.0	5.8x	0.9x
Ceramics	401	410	-9.21	-2.25%	5	17,981	0.3%	73.1	1.1%	NM	1.2x	PUBALIBANK	39,043	1.1%	22.7	5.3x	0.7x
Miscellaneous	4,163	4,193	-30.09	-0.72%	15	226,069	3.2%	464.5	6.8%	86.3x	1.8x	CITYBANK	36,357	1.0%	210.4	3.3x	0.7x
Corporate Bond**	15,408	15,344	+64.09	+0.42%	16	34,016	0.5%	1.4	0.0%	NM	NM	OLYMPIC	33,690	0.9%	60.8	18.2x	2.8x
Treasury Bond**	2,209	2,167	+41.95	+1.94%	235	3,484,741	48.7%	5.5	0.1%	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
RAHIMTEXT	180.8	+10.0%	24.7	NM	7.1x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	BSC	119.5	-3.9%	313.8	6.1x	1.2x
HAMI	105.0	+9.9%	9.0	NM	11.5x	ISLAMIBANK	74,730	5.3%	15.7x	1.0x	CITYBANK	23.9	-3.2%	210.4	3.3x	0.7x
HAKKANIPUL	76.2	+6.6%	113.8	NM	3.1x	BEXIMCO	69,463	4.9%	NM	1.3x	EHL	88.0	+1.3%	173.0	12.0x	1.0x
SAFKOSPINN	14.7	+6.5%	14.1	NM	NM	BATBC	50,233	3.6%	12.9x	3.0x	MALEKSPIN	30.4	-	165.3	4.1x	0.5x
PRAGATILIF	123.4	+6.1%	63.3	NM	NM	WALTONHIL	46,773	3.3%	10.5x	1.2x	BXPHARMA	116.7	-1.2%	151.4	8.1x	1.0x
STYLECRAFT	75.2	+5.32%	50.6	NM	13.0x	BRACBANK	46,489	3.3%	9.6x	1.6x	JAMUNABANK	20.8	-2.3%	147.7	7.2x	0.8x
ACTIVEFINE	9.9	+5.3%	23.0	NM	0x	GP	44,708	3.2%	14.5x	7.5x	BRACBANK	68.2	-1.3%	129.1	9.6x	1.6x
JMISMDL	152.5	+4.7%	29.7	61.7x	1.7x	RENATA	32,968	2.3%	20.4x	1.7x	ORIONINFU	388.0	+2.8%	126.2	NM	24.7x
BDLAMPS	149.2	+4.5%	24.9	NM	3.4x	BXPHARMA	23,409	1.7%	8.1x	1.0x	SQURPHARMA	229.6	-0.5%	119.8	8.7x	1.5x
STANCERAM	71.6	+3.6%	0.8	NM	NM	PUBALIBANK	22,905	1.6%	5.3x	0.7x	HAKKANIPUL	76.2	+6.6%	113.8	NM	3.1x
						CITYBANK	21,020	1.5%	3.3x	0.7x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	17.8x	3.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ICB3RDNRB	4.7	-7.8%	2.3	NM	0.8x	OLYMPIC	20,496	1.5%	18.2x	2.8x	ORIONINFU	364.0	352.0	10.0	172	61.29
ICBAGRANI1	7.3	-7.6%	2.8	NM	1x	ALARABANK	18,282	1.3%	39.0x	0.8x	ASIATICLAB	47.5	44.0	5.0	565	26.53
TUNGHAI	2.7	-6.9%	0.4	NM	NM	BEACONPHAR	17,838	1.3%	30.0x	4.0x	LOVELLO	101.0	101.0	2.0	207	20.88
FIRSTFIN	3.0	-6.3%	0.2	NM	NM	PRIMEBANK	16,142	1.1%	3.8x	0.8x	JAMUNABANK	21.3	21.3	1.0	700	14.91
KARNAPHULI	30.6	-6.1%	32.3	14.3x	1.3x	ROBI	14,876	1.1%	16.4x	2.2x	CITYGENINS	48.6	48.2	5.0	302	14.60
IFILISLMF1	4.7	-6.0%	8.5	NM	0.7x	UTTARABANK	13,699	1.0%	NM	0.8x	MONNOCERA	89.0	88.8	3.0	59	5.22
STANDBANKL	6.8	-5.6%	29.4	9.0x	0.4x	NBL	13,055	0.9%	NM	NM	BDLAMPS	144.1	140.1	3.0	35	5.04
PF1STMF	5.2	-5.5%	3.6	NM	0.9x	BSRMLTD	12,852	0.9%	5.3x	0.6x	HAKKANIPUL	72.4	71.7	3.0	67	4.86
ICBSONALI1	5.5	-5.2%	28.1	NM	0.8x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
FARCHEM	22.1	-4.7%	7.7	56.7x	0.7x	** 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										

* 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
ORIONINFU	364.0	352.0	61.3	172	10
ASIATICLAB	47.5	44.0	26.5	565	5
LOVELLO	101.0	101.0	20.9	207	2
JAMUNABANK	21.3	21.3	14.9	700	1
CITYGENINS	48.6	48.2	14.6	302	5
MONNOCERA	89.0	88.8	5.2	59	3
BDLAMPS	144.1	140.1	5.0	35	3
HAKKANIPUL	72.4	71.7	4.9	67	3
SUNLIFEINS	57.0	52.5	3.1	56	3
SIMTEX	17.4	17.2	2.3	132	3
MPETROLEUM	215.5	215.5	2.2	10	1
UTTARABANK	22.4	22.4	2.1	93	1
BANKASIA	20.3	20.3	2.0	100	1
RAHIMAFOOD	161.0	160.8	2.0	12	3
AL-HAJTEX	127.0	125.0	1.9	15	2
OLYMPIC	182.0	182.0	1.8	10	1
KARNAPHULI	32.9	32.9	1.6	50	1
CITYBANK	25.4	25.4	1.6	63	2
MALEKSPIN	31.5	31.5	1.6	50	1
RAHIMTEXT	178.0	175.0	1.6	9	2
IFIC	6.8	6.8	1.4	200	1
ITC	42.8	42.8	1.3	30	1
Total			194.3		72

Important DSE News

JANATAINS

(Q2 Un-audited): EPS was Tk. 0.50 for April-June 2025 as against Tk. 0.79 for April-June 2024; EPS was Tk. 0.77 for January-June 2025 as against Tk. 1.17 for January-June 2024. NOCFPS was Tk. 0.67 for January-June 2025 as against Tk. 0.44 for January-June 2024. NAV per share was Tk. 15.74 as on June 30, 2025 and Tk. 14.96 as on December 31, 2024.

KTL

(Q1 Un-audited): EPS was Tk. 0.04 for July-September 2024 as against Tk. (0.22) for July-September 2023; NOCFPS was Tk. (0.06) for July-September 2024 as against Tk. 0.01 for July-September 2023. NAV per share was Tk. 15.06 as on September 30, 2024 and Tk. 15.02 as on June 30, 2024. EPS increase has been resulted from significant decreases in overhead and salary expenses along with increase in sales.

(Q2 Un-audited): EPS was Tk. 0.05 for October-December 2024 as against Tk. (0.17) for October-December 2023; EPS was Tk. 0.09 for July-December 2024 as against Tk. (0.39) for July-December 2023. NOCFPS was Tk. (0.08) for July-December 2024 as against Tk. (0.03) for July-December 2023. NAV per share was Tk. 15.11 as on December 31, 2024 and Tk. 15.02 as on June 30, 2024. EPS increase has been resulted from significant decreases in overhead and salary expenses along with increase in sales.

(Q3 Un-audited): EPS was Tk. 0.04 for January-March 2025 as against Tk. (0.13) for January-March 2024; EPS was Tk. 0.13 for July 2024-March 2025 as against Tk. (0.52) for July 2023-March 2024. NOCFPS was Tk. 0.07 for July 2024-March 2025 as against Tk. (1.25) for July 2023-March 2024. NAV per share was Tk. 15.15 as on March 31, 2025 and Tk. 15.02 as on June 30, 2024. EPS increase has been resulted from significant decreases in overhead and salary expenses along with increase in sales.

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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