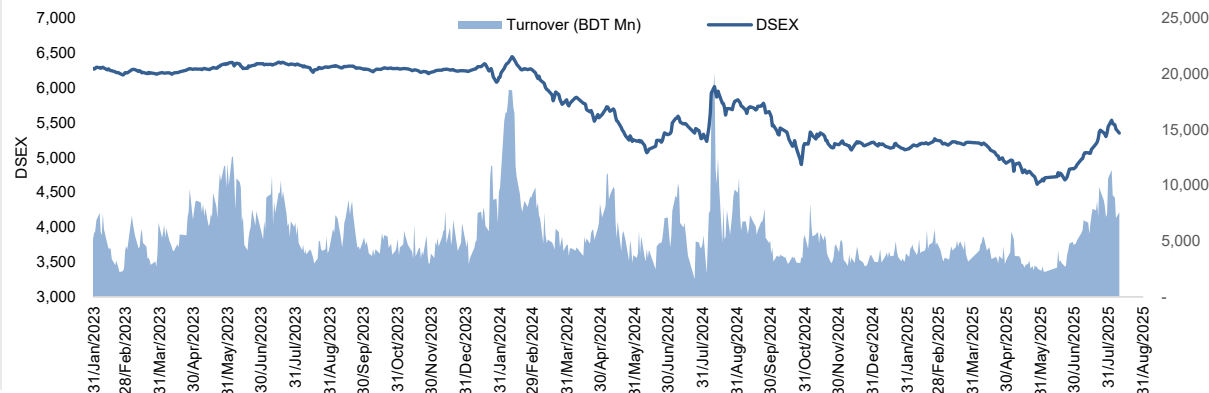


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.05%) lost 57.04 points and closed at 5,351.03. The blue-chip index DS30 (-1.48%), the Shariah-based index DSES (-0.69%), and the large-cap index CDSET (-1.11%) closed at 2,066.64, 1,162.36, and 1,100.25 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.08% followed by Pharmaceutical (-1.45%), Fuel & Power (-1.31%), Bank (-1.28%), Food & Allied (-0.79%), Engineering (-0.30%), and Telecommunication (-0.30%), respectively. Block trades contributed 6.2% of the overall market turnover. Bangladesh Shipping Corporation (-4.7%) was the most traded share with a turnover of BDT 273 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,351.03	5,408.07	-57.04	-1.05%	+2.6%
DS30	2,066.64	2,097.70	-31.06	-1.48%	+6.5%
DSES	1,162.36	1,170.43	-8.08	-0.69%	-0.6%
CDSET	1,100.25	1,112.56	-12.31	-1.11%	+3.2%

	Advanced	Declined	Unchanged	Total
All Category	109	247	45	401
A Category (Equity)	52	148	22	222
B Category (Equity)	38	38	7	83
N Category (Equity)	0	0	1	1
Z Category (Equity)	19	61	15	95
Mutual Funds	3	18	15	36
Corporate Bonds	1	0	3	4
Treasury Bonds	0	4	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,129,401	7,150,792	-0.3%
	Mn USD	58,727	58,903	
Turnover	Mn BDT	7,606	7,064	+7.7%
	Mn USD	63	58	
Volume	Mn Shares	230	233	-1.4%
No. of Trade		228,460	212,827	+7.3%

* Average Interbank Exchange Rate is BDT 121.40 as of Aug 10, 2025

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Figure: Sectorial Turnover (BDT Mn)

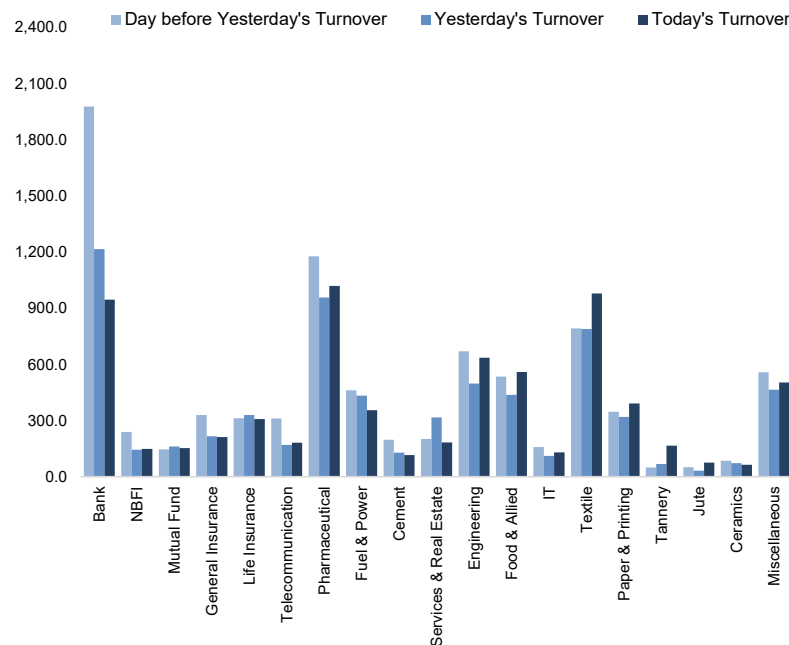
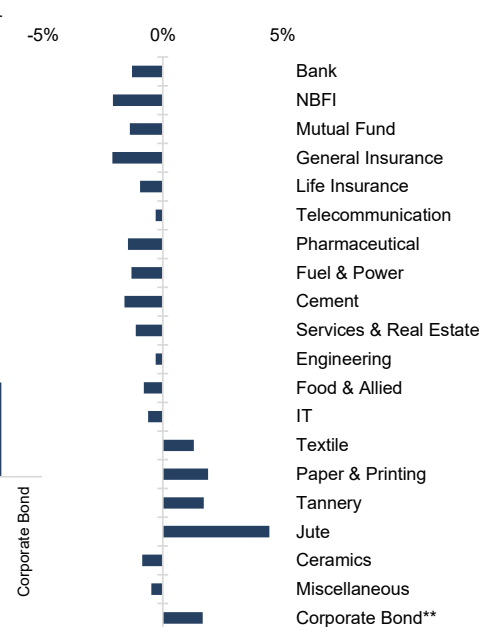


Figure: Sectorial Mcap Change



Market PE 16.2x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, 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	1,535	1,555	-19.97	-1.28%	36	726,198	10.2%	945.4	13.3%	NM	0.8x	GP	426,965	11.8%	42.0	14.5x	7.5x
NBFI	1,062	1,085	-22.60	-2.08%	23	101,237	1.4%	148.5	2.1%	NM	NM	SQURPHARMA	199,983	5.5%	98.6	8.5x	1.5x
Mutual Fund	594	602	-8.30	-1.38%	37	28,448	0.4%	153.6	2.2%	NM	0.5x	BATBC	158,976	4.4%	36.5	12.8x	3.0x
General Insurance	2,657	2,715	-57.16	-2.11%	43	75,842	1.1%	211.8	3.0%	12.8x	1.1x	ROBI	139,853	3.9%	60.5	16.1x	2.2x
Life Insurance	1,842	1,860	-17.59	-0.95%	15	48,992	0.7%	308.2	4.3%	NM	NM	WALTONHIL	135,560	3.7%	7.7	10.5x	1.2x
Telecommunication	5,076	5,092	-15.14	-0.30%	3	595,248	8.3%	181.2	2.5%	15.1x	4.3x	BRACBANK	133,392	3.7%	95.2	9.4x	1.6x
Pharmaceutical	3,077	3,122	-45.37	-1.45%	34	583,296	8.2%	1,018.6	14.3%	13.4x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,150	1,166	-15.31	-1.31%	23	304,698	4.3%	355.9	5.0%	19.3x	0.6x	MARICO	90,578	2.5%	36.0	14.8x	27.2x
Cement	2,069	2,103	-33.73	-1.60%	7	98,604	1.4%	115.9	1.6%	22.7x	2.2x	UPGDCL	79,882	2.2%	18.4	6.9x	1.9x
Services & Real Estate	989	1,000	-11.31	-1.13%	9	54,393	0.8%	183.3	2.6%	25.0x	0.4x	BERGERPBL	76,247	2.1%	1.8	21.7x	4.4x
Engineering	2,493	2,500	-7.53	-0.30%	42	281,198	3.9%	635.2	8.9%	13.3x	0.9x	LHB	65,734	1.8%	72.7	17.5x	3.5x
Food & Allied	15,090	15,210	-120.22	-0.79%	21	276,106	3.9%	559.4	7.8%	20.9x	4.4x	RENATA	56,752	1.6%	33.7	20.2x	1.6x
IT	1,814	1,825	-11.21	-0.61%	11	23,930	0.3%	129.8	1.8%	20.1x	1.5x	BXPHARMA	50,277	1.4%	115.4	7.9x	1.0x
Textile	1,134	1,119	+14.48	+1.29%	58	118,069	1.7%	978.3	13.7%	NM	0.8x	UNILEVERCL	48,220	1.3%	0.7	75.9x	26.4x
Paper & Printing	4,676	4,589	+87.03	+1.90%	6	21,124	0.3%	391.7	5.5%	NM	1.0x	DUTCHBANGL	42,148	1.2%	9.1	11.2x	0.8x
Tannery	2,066	2,031	+34.88	+1.72%	6	23,017	0.3%	165.4	2.3%	NM	1.7x	ICB	41,282	1.1%	6.1	NM	1.0x
Jute	12,492	11,960	+531.83	+4.45%	3	2,750	0.0%	74.9	1.1%	NM	NM	EBL	40,693	1.1%	22.3	5.8x	0.9x
Ceramics	397	401	-3.45	-0.86%	5	17,826	0.2%	64.4	0.9%	NM	1.2x	PUBALIBANK	39,043	1.1%	17.2	5.3x	0.7x
Miscellaneous	4,143	4,163	-19.85	-0.48%	15	224,991	3.2%	503.8	7.1%	85.9x	1.8x	CITYBANK	36,053	1.0%	157.3	3.3x	0.7x
Corporate Bond**	15,664	15,408	+256.36	+1.66%	16	34,582	0.5%	3.7	0.1%	NM	NM	OLYMPIC	33,070	0.9%	65.4	17.9x	2.7x
Treasury Bond**	2,219	2,209	+10.29	+0.47%	235	3,495,600	49.0%	3.8	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
APEXTANRY	79.2	+10.0%	18.0	NM	2.4x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	BSC	113.9	-4.7%	273.3	5.8x	1.2x
STYLECRAFT	82.7	+10.0%	57.8	NM	14.3x	ISLAMIBANK	74,730	5.3%	15.6x	1.0x	ORIONINFU	406.3	+4.7%	224.4	NM	25.9x
ANWARGALV	80.6	+10.0%	68.5	NM	40.3x	BEXIMCO	69,463	4.9%	NM	1.3x	MALEKSPIN	31.5	+3.6%	213.5	4.3x	0.5x
RAHIMTEXT	198.8	+10.0%	14.4	NM	7.8x	BATBC	50,233	3.6%	12.8x	3.0x	CITYBANK	23.7	-0.8%	157.3	3.3x	0.7x
STANCERAM	78.7	+9.9%	1.8	NM	NM	WALTONHIL	46,773	3.3%	10.5x	1.2x	HAKKANIPUL	79.6	+4.5%	125.5	NM	3.3x
APEXFOODS	246.1	+8.70%	37.9	55.8x	2.0x	BRACBANK	46,489	3.3%	9.4x	1.6x	SONALIPAPR	181.9	+3.6%	117.0	17.6x	1.1x
ARAMIT	223.1	+8.0%	29.7	57.9x	2x	GP	44,708	3.2%	14.5x	7.5x	BXPHARMA	112.7	-3.4%	115.4	7.9x	1.0x
BDAUTOCA	121.2	+5.7%	24.2	NM	16.4x	RENATA	32,968	2.3%	20.2x	1.6x	RAHIMAFOOD	160.0	-1.1%	107.1	NM	17.4x
YPL	15.1	+5.6%	5.2	NM	2.8x	BXPHARMA	23,409	1.7%	7.9x	1.0x	ASIATICLAB	48.8	+3.8%	106.9	20.2x	0.9x
AMCL(PRAN)	244.5	+5.3%	7.1	45.4x	2.6x	PUBALIBANK	22,905	1.6%	5.3x	0.7x	SQURPHARMA	225.6	-1.7%	98.6	8.5x	1.5x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.3x	0.7x						
AIBL1STIMF	5.0	-9.1%	11.6	NM	0.5x	LHB	20,953	1.5%	17.5x	3.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NITOLINS	25.5	-7.9%	2.2	9.1x	1x	OLYMPIC	20,496	1.5%	17.9x	2.7x	ORIONINFU	381.0	354.9	22.0	705	263.78
BAYLEASING	4.2	-6.7%	0.6	NM	NM	ALARABANK	18,282	1.3%	38.0x	0.8x	BRACBANK	68.2	68.2	1.0	1,250	85.25
SEMLLECMF	7.4	-6.3%	26.7	NM	0.8x	BEACONPHAR	17,838	1.3%	29.5x	3.9x	FINEFOODS	266.0	250.0	13.0	133	33.80
UNIONCAP	4.5	-6.3%	0.8	NM	NM	PRIMEBANK	16,142	1.1%	3.8x	0.8x	KBPPWBIL	112.0	108.0	3.0	174	19.33
CENTRALINS	36.8	-6.1%	16.8	21.6x	0.7x	ROBI	14,876	1.1%	16.1x	2.2x	TILIL	56.0	50.4	4.0	257	14.09
ICBSONALI1	5.2	-5.5%	7.7	NM	0.8x	UTTARABANK	13,699	1.0%	NM	0.8x	ENVOYTEX	47.0	47.0	2.0	250	11.75
REGENTTEX	3.6	-5.3%	0.5	NM	0.1x	NBL	13,055	0.9%	NM	NM	EXIM1STMF	5.1	4.8	2.0	1,711	8.25
LRGLOBMF1	3.6	-5.3%	6.1	NM	0.4x	BSRMLTD	12,852	0.9%	5.1x	0.5x	CITYGENINS	49.7	48.0	9.0	143	6.94
PROVATIINS	31.7	-5.1%	8.6	17.1x	1.4x	* 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					SAMATALETH	84.0	75.0	4.0	68	5.15
											AL-HAJTEX	128.0	128.0	2.0	31	3.94

* 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	381.0	354.9	263.8	705	22
BRACBANK	68.2	68.2	85.3	1,250	1
FINEFOODS	266.0	250.0	33.8	133	13
KBPPWBIL	112.0	108.0	19.3	174	3
TILIL	56.0	50.4	14.1	257	4
ENVOYTEX	47.0	47.0	11.8	250	2
EXIM1STMF	5.1	4.8	8.2	1,711	2
CITYGENINS	49.7	48.0	6.9	143	9
SAMATALETH	84.0	75.0	5.2	68	4
AL-HAJTEX	128.0	128.0	3.9	31	2
SHEPHERD	17.5	17.5	3.5	200	2
RAHIMTEXT	198.8	175.0	2.4	13	4
NAHEEACP	19.4	19.4	1.6	80	1
STANDBANKL	7.3	7.3	1.3	177	2
AMANFEED	24.9	24.9	1.2	49	1
KAY&QUE	292.0	292.0	1.2	4	1
MALEKSPIN	33.3	33.3	1.1	33	2
PUBALIBANK	30.5	30.5	1.0	33	1
BSCPLC	137.0	137.0	1.0	7	1
EXIMBANK	6.6	6.6	0.9	140	1
LOVELLO	99.7	99.7	0.8	9	1
CVOPRL	149.1	149.1	0.7	5	1
Total			473.7		88

Important DSE News
NCCBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.79 for April-June 2025 as against Tk. 0.52 for April-June 2024; Consolidated EPS was Tk. 1.04 for January-June 2025 as against Tk. 0.67 for January-June 2024. Consolidated NOCFPS was Tk. 11.40 for January-June 2025 as against Tk. 1.31 for January-June 2024. Consolidated NAV per share was Tk. 23.27 as on June 30, 2025 and Tk. 22.37 as on December 31, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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