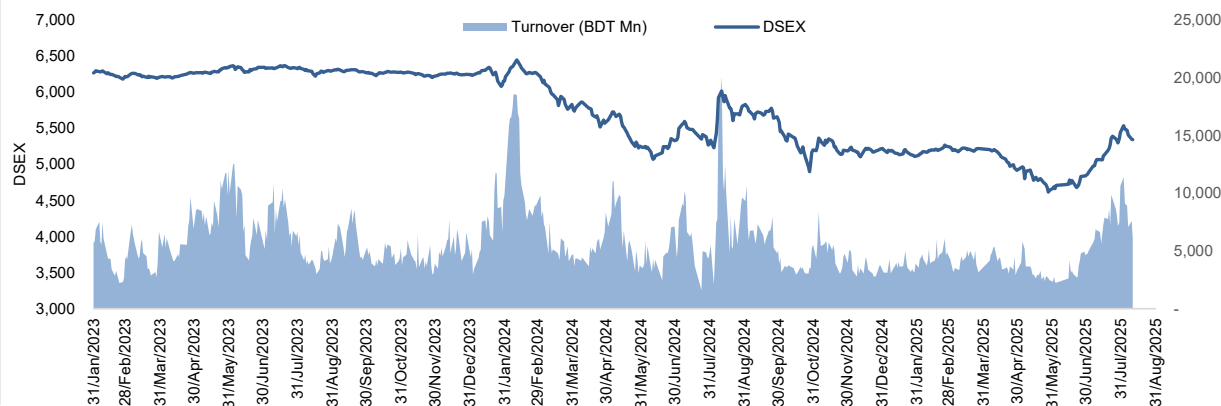


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.13%) lost 6.98 points and closed at 5,344.05. The blue-chip index DS30 (+0.02%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (-0.10%) closed at 2,067.03, 1,162.08, and 1,099.17 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 1.20%, followed by Fuel & Power (+0.61%), Bank (+0.27%), Telecommunication (+0.19%), Engineering (-0.16%), Pharmaceutical (-0.49%), and Food & Allied (-0.76%), respectively. Block trades contributed 2.0% of the overall market turnover. Bangladesh Shipping Corporation (+2.9%) was the most traded share with a turnover of BDT 209 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,344.05	5,351.03	-6.98	-0.13%	+2.4%
DS30	2,067.03	2,066.64	+0.38	+0.02%	+6.6%
DSES	1,162.08	1,162.36	-0.28	-0.02%	-0.6%
CDSET	1,099.17	1,100.25	-1.08	-0.10%	+3.1%

	Advanced	Declined	Unchanged	Total
All Category	121	201	83	405
A Category (Equity)	66	126	34	226
B Category (Equity)	29	38	16	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	26	37	33	96
Mutual Funds	8	16	12	36
Corporate Bonds	1	2	0	3
Treasury Bonds	0	8	0	8

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,118,375	7,129,401	-0.2%
	Mn USD	58,635	58,726	
Turnover	Mn BDT	6,109	7,606	-19.7%
	Mn USD	50	63	
Volume	Mn Shares	195	230	-15.4%
No. of Trade		195,303	228,460	-14.5%

* Average Interbank Exchange Rate is BDT 121.40 as of Aug 11, 2025

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Figure: Sectorial Turnover (BDT Mn)

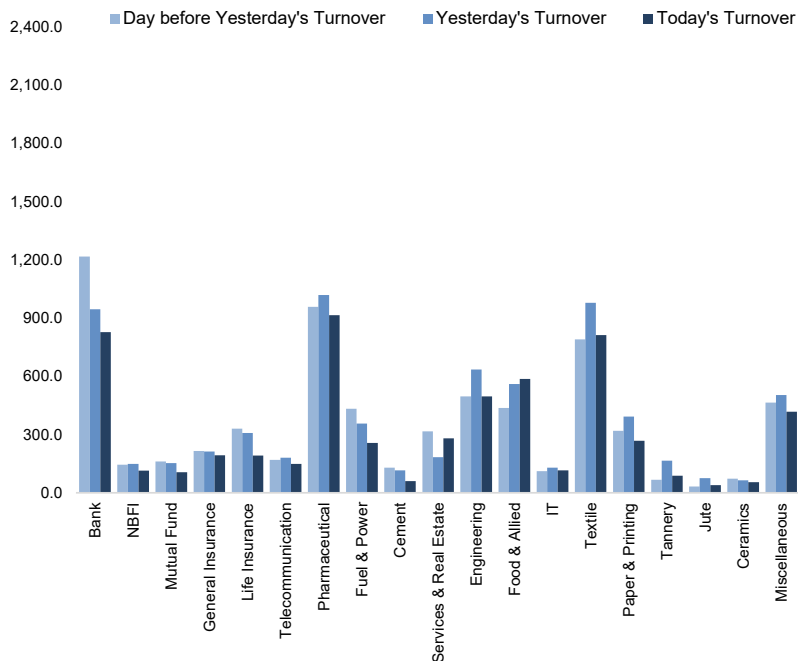
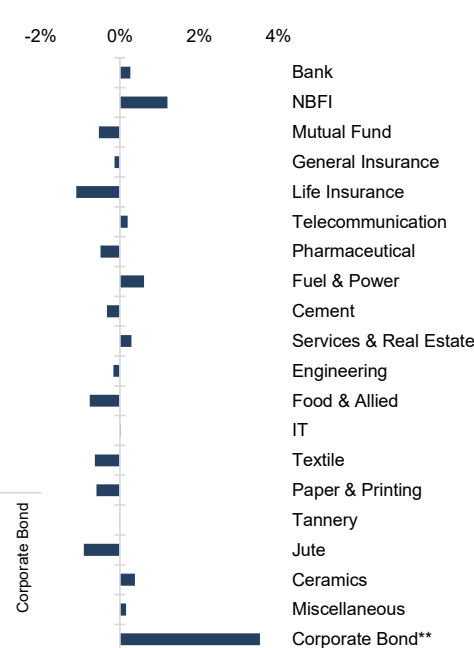


Figure: Sectorial Mcap Change



Market PE 16.2x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, 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	1,539	1,535	+4.07	+0.27%	36	728,125	10.2%	827.3	13.8%	NM	0.8x	GP	427,370	11.8%	36.0	14.5x	7.5x
NBFI	1,075	1,062	+12.73	+1.20%	23	102,450	1.4%	113.8	1.9%	NM	NM	SQURPHARMA	198,742	5.5%	84.9	8.5x	1.5x
Mutual Fund	590	594	-3.13	-0.53%	37	28,298	0.4%	106.3	1.8%	NM	0.5x	BATBC	157,194	4.3%	44.0	12.7x	2.9x
General Insurance	2,654	2,657	-3.70	-0.14%	43	75,737	1.1%	193.5	3.2%	12.7x	1.1x	ROBI	140,377	3.9%	36.8	16.1x	2.2x
Life Insurance	1,822	1,842	-20.23	-1.10%	15	48,454	0.7%	191.1	3.2%	NM	NM	WALTONHIL	136,197	3.8%	4.1	10.6x	1.2x
Telecommunication	5,086	5,076	+9.84	+0.19%	3	596,401	8.4%	148.9	2.5%	15.1x	4.3x	BRACBANK	135,980	3.8%	78.3	9.6x	1.6x
Pharmaceutical	3,061	3,077	-15.15	-0.49%	34	580,424	8.1%	913.9	15.3%	13.3x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,157	1,150	+6.97	+0.61%	23	306,545	4.3%	256.2	4.3%	19.4x	0.7x	MARICO	89,778	2.5%	19.0	14.7x	26.9x
Cement	2,062	2,069	-6.71	-0.32%	7	98,284	1.4%	60.5	1.0%	22.6x	2.2x	UPGDCL	79,998	2.2%	6.4	6.9x	1.9x
Services & Real Estate	992	989	+2.84	+0.29%	9	54,549	0.8%	279.9	4.7%	25.1x	0.4x	BERGERPBL	76,016	2.1%	4.1	21.6x	4.4x
Engineering	2,489	2,493	-4.04	-0.16%	42	280,742	3.9%	496.4	8.3%	13.2x	0.9x	LHB	65,153	1.8%	33.3	17.4x	3.4x
Food & Allied	14,975	15,090	-114.95	-0.76%	21	274,002	3.8%	586.2	9.8%	20.7x	4.3x	RENATA	56,706	1.6%	18.9	20.2x	1.6x
IT	1,815	1,814	+0.29	+0.02%	11	23,933	0.3%	115.3	1.9%	20.1x	1.5x	BXPBARMA	50,634	1.4%	75.5	7.9x	1.0x
Textile	1,127	1,134	-7.19	-0.63%	58	117,320	1.6%	811.5	13.6%	NM	0.8x	UNILEVERCL	47,858	1.3%	0.3	75.3x	26.2x
Paper & Printing	4,648	4,676	-27.53	-0.59%	6	21,000	0.3%	268.2	4.5%	NM	1.0x	ICB	42,409	1.2%	8.9	NM	1.0x
Tannery	2,065	2,066	-0.40	-0.02%	6	23,012	0.3%	88.2	1.5%	NM	1.7x	DUTCHBANGL	41,858	1.2%	5.6	11.2x	0.8x
Jute	12,379	12,492	-113.64	-0.91%	3	2,725	0.0%	39.1	0.7%	NM	NM	EBL	40,693	1.1%	12.0	5.8x	0.9x
Ceramics	399	397	+1.51	+0.38%	5	17,893	0.3%	54.5	0.9%	NM	1.2x	PUBALIBANK	38,132	1.1%	29.2	5.2x	0.7x
Miscellaneous	4,150	4,143	+6.40	+0.15%	15	225,339	3.2%	417.5	7.0%	86.0x	1.8x	CITYBANK	35,901	1.0%	108.9	3.3x	0.7x
Corporate Bond**	16,217	15,664	+553.15	+3.53%	16	35,803	0.5%	2.2	0.0%	NM	NM	OLYMPIC	32,910	0.9%	27.7	17.8x	2.7x
Treasury Bond**	2,212	2,216	-3.50	-0.16%	235	3,484,102	48.9%	14.1	0.2%	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
MITHUNKNIT	17.6	+10.0%	2.7	NM	5.5x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	BSC	117.2	+2.9%	208.8	5.9x	1.2x
TALLUSPIN	6.1	+8.9%	4.1	NM	0.4x	ISLAMIBANK	74,730	5.3%	15.7x	1.0x	ORIONINFU	395.6	-2.6%	172.8	NM	25.2x
SEAPEARL	53.7	+8.0%	160.1	NM	3.2x	BEXIMCO	69,463	4.9%	NM	1.3x	MALEKSPIN	30.3	-3.8%	167.1	4.1x	0.5x
FIRSTFIN	3.1	+6.9%	0.1	NM	NM	BATBC	50,233	3.6%	12.7x	2.9x	SEAPEARL	53.7	+8.0%	160.1	NM	3.2x
GQBALLPEN	263.5	+6.8%	24.9	NM	1.9x	WALTONHIL	46,773	3.3%	10.6x	1.2x	RAHIMAFOD	168.9	+5.6%	126.9	NM	18.4x
MIDLANDBNK	20.1	+6.35%	69.2	20.7x	1.4x	BRACBANK	46,489	3.3%	9.6x	1.6x	BEACHHATCH	48.3	+4.8%	115.3	10.3x	2.9x
TITASGAS	22.4	+6.2%	28.8	NM	0x	GP	44,708	3.2%	14.5x	7.5x	CITYBANK	23.6	-0.4%	108.9	3.3x	0.7x
RAHIMAFOD	168.9	+5.6%	126.9	NM	18.4x	RENATA	32,968	2.3%	20.2x	1.6x	KBPPWBIL	113.0	+0.1%	106.9	NM	9.4x
ACMEPL	15.1	+4.9%	40.3	NM	0.9x	BXPBARMA	23,409	1.7%	7.9x	1.0x	AIL	48.4	+3.9%	98.7	17.9x	2.0x
BEACHHATCH	48.3	+4.8%	115.3	10.3x	2.9x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	SONALIPAPR	183.1	+0.7%	97.0	17.7x	1.1x
						CITYBANK	21,020	1.5%	3.3x	0.7x						
						LHB	20,953	1.5%	17.4x	3.4x						
						OLYMPIC	20,496	1.5%	17.8x	2.7x						
						ALARABANK	18,282	1.3%	38.0x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FAREASTFIN	3.1	-8.8%	1.0	NM	NM	BEACONPHAR	17,838	1.3%	29.2x	3.9x	FINEFOODS	264.0	258.1	9.0	113	29.25
REGENTEX	3.3	-8.3%	1.5	NM	0x	PRIMEBANK	16,142	1.1%	3.8x	0.8x	PUBALIBANK	29.0	29.0	2.0	1,000	29.00
PRIMEFIN	4.0	-4.8%	0.5	NM	0.6x	ROBI	14,876	1.1%	16.1x	2.2x	KBPPWBIL	122.0	122.0	1.0	200	24.40
MERCINS	24.4	-4.7%	1.0	12.7x	1.2x	UTTARABANK	13,699	1.0%	NM	0.8x	TILIL	56.5	56.5	1.0	100	5.65
GSPFINANCE	4.6	-4.2%	0.2	NM	0.4x	NBL	13,055	0.9%	NM	NM	CITYGENINS	48.9	48.0	4.0	95	4.58
PHENIXINS	25.6	-4.1%	1.4	16.4x	0.8x	BSRMLTD	12,852	0.9%	5.0x	0.5x	CITYBANK	21.5	21.5	2.0	200	4.30
MALEKSPIN	30.3	-3.8%	167.1	4.1x	0.5x						CONFIDCEM	62.0	62.0	1.0	50	3.10
SSSTEEL	5.5	-3.5%	3.2	NM	0.2x						RAHIMAFOD	162.1	159.0	3.0	14	2.19
SINOBANGLA	44.7	-3.5%	29.0	35.1x	1.7x						UTTARABANK	21.5	21.5	1.0	100	2.15
EXIMBANK	5.7	-3.4%	6.3	NM	0.3x						BXPBARMA	123.5	116.2	3.0	17	2.04

* 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
FINEFOODS	264.0	258.1	29.3	113	9
PUBALIBANK	29.0	29.0	29.0	1,000	2
KBPPWBIL	122.0	122.0	24.4	200	1
TILIL	56.5	56.5	5.7	100	1
CITYGENINS	48.9	48.0	4.6	95	4
CITYBANK	21.5	21.5	4.3	200	2
CONFIDCEM	62.0	62.0	3.1	50	1
RAHIMAFood	162.1	159.0	2.2	14	3
UTTARABANK	21.5	21.5	2.2	100	1
BXPHARMA	123.5	116.2	2.0	17	3
PTL	48.5	48.5	1.9	39	1
HAKKANIPUL	87.5	77.0	1.7	21	2
CVOPRL	148.3	148.3	1.4	9	1
SONALIANS	195.2	195.2	1.4	7	1
SIMTEX	18.3	18.2	1.2	68	2
PRAGATILIF	138.7	138.7	1.1	8	1
SQURPHARMA	225.4	225.4	1.1	5	1
LOVELLO	95.4	95.4	1.0	10	1
EIL	35.4	35.4	0.8	23	1
GQBALLPEN	240.0	240.0	0.8	3	1
PHARMAID	643.0	643.0	0.7	1	1
SUNLIFEINS	57.2	57.2	0.7	12	1
Total			124.3		48

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
AGRANINS		6.0%	6.0%	Record Date II be notified lat	
TOSRIFA		2.0%	0.0%	Record Date II be notified lat	
MIRACLEIND		0.0%	0.0%	Record Date II be notified lat	

Important DSE News
PLFSL

(Q2 Un-audited): The company has informed that EPS was Tk. (6.62) for January-June 2025 as against Tk. (5.74) for January-June 2024; NOCFPS was Tk. (0.52) for January-June 2025 as against Tk. 0.36 for January-June 2024 and NAV per share was Tk. (156.12) as on June 30, 2025 and Tk. (141.43) as on June 30, 2024. Refer to their earlier news disseminated by DSE today i.e., 11.08.2025 regarding Q2 Financials, the company has further informed that EPS was Tk. (3.17) April-June 2025 as against Tk. (2.76) April-June 2024; NAV per share was Tk. (149.50) as on December 31, 2024.

DAFODILCOM

Refer to their earlier news disseminated by DSE on 03.12.2024 regarding board decision to issue shares, the company has further informed that Bangladesh Securities and Exchange Commission vide its letter dated 07 August 2025 has informed that it is not in a position to accord its consent to the company for raising of capital of Tk. 46.70 crore through issuance of 4,67,00,000 ordinary shares of Tk. 10 each to the existing shareholder in cash consideration.

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