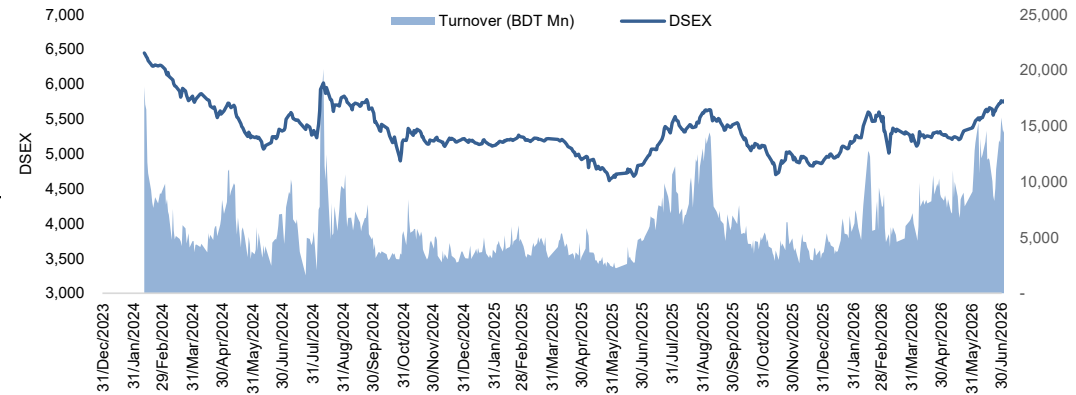


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.06%) lost 3.48 points and closed at 5,640.09. The blue-chip index DS30 (-0.22%), the Shariah-based index DSES (+0.25%), and the large-cap index CDSET (-0.18%) closed at 2,126.11, 1,126.84, and 1,123.50 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.56%, followed by NBF1 (+0.16%), Pharmaceutical (+0.12%), Food & Allied (+0.09%), Telecommunication (-0.01%), Bank (-0.29%), and Engineering (-0.34%), respectively. Block trades contributed 5.1% of the overall market turnover. Sharp Industries PLC (-10.0%) was the most traded share with a turnover of BDT 253 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,640.09	5,643.57	-3.48	-0.06%	+15.9%
DS30	2,126.11	2,130.84	-4.73	-0.22%	+14.7%
DSES	1,126.84	1,123.99	+2.85	+0.25%	+12.6%
CDSET	1,123.50	1,125.52	-2.02	-0.18%	+11.8%

	Advanced	Declined	Unchanged	Total
All Category	175	152	64	391
A Category (Equity)	92	82	25	199
B Category (Equity)	36	32	6	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	47	38	33	118
Mutual Funds	12	8	14	34
Corporate Bonds	3	0	1	4
Treasury Bonds	1	2	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,954,787	6,957,361	-0.0%
	Mn USD	56,588	56,609	-0.0%
Turnover	Mn BDT	5,067	6,020	-15.8%
	Mn USD	41	49	-15.8%
Volume	Mn Shares	192	225	-14.8%
No. of Trade		154,602	191,943	-19.5%

* Average Interbank Exchange Rate is BDT 122.90 as of Aug 25, 2026

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Tasviha Taher Trishila Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

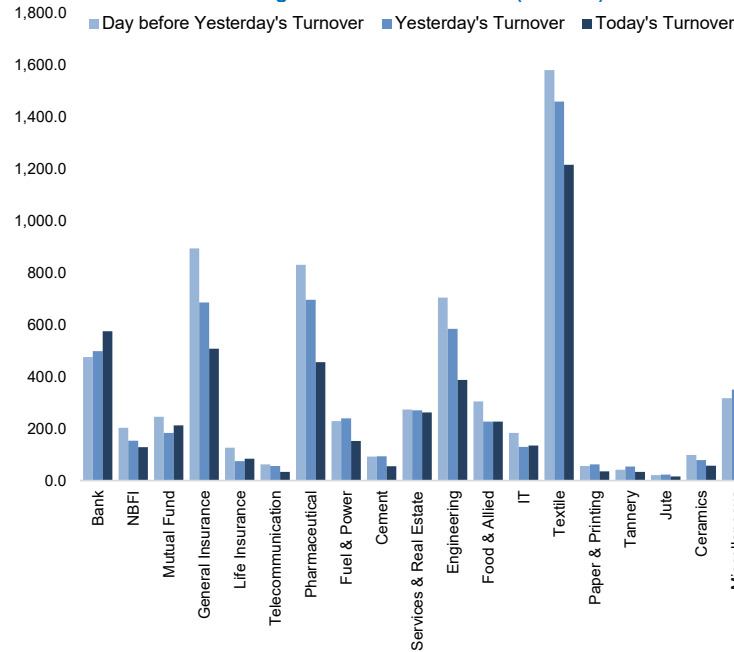
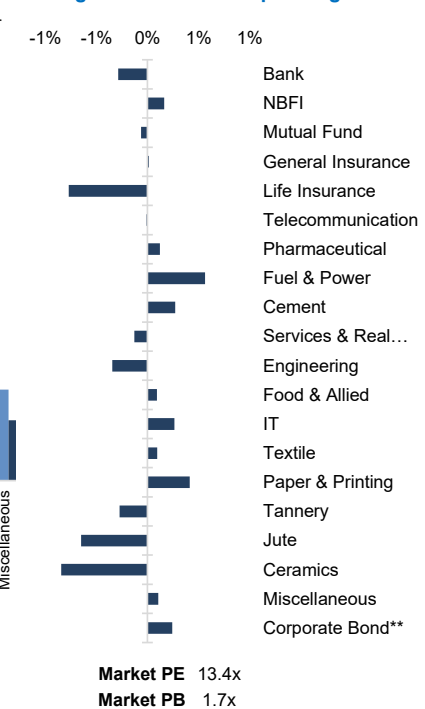


Figure: Sectorial Mcap Change



* Market P/E and P/BV calculation excludes
Mutual Fund, Life Insurance, selected NBFIs and Banks

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	1,562	1,567	-4.47	-0.29%	36	744,514	10.7%	573.8	11.9%	7.3x	0.8x	GP	329,878	9.3%	14.6	9.4x	5.9x
NBFI	1,119	1,117	+1.82	+0.16%	23	106,365	1.5%	128.2	2.7%	NM	1.1x	SQURPHARMA	193,158	5.4%	27.0	7.5x	1.3x
Mutual Fund	643	643	-0.40	-0.06%	34	29,910	0.4%	212.6	4.4%	NM	0.6x	ROBI	160,805	4.5%	17.7	15.4x	2.5x
General Insurance	4,418	4,418	+0.61	+0.01%	43	124,837	1.8%	507.2	10.5%	18.4x	1.7x	BRACBANK	141,037	4.0%	190.2	6.2x	1.2x
Life Insurance	1,758	1,771	-13.63	-0.77%	15	49,544	0.7%	83.8	1.7%	NM	NM	BATBC	128,466	3.6%	19.4	22.1x	2.2x
Telecommunication	4,475	4,476	-0.38	-0.01%	3	519,281	7.5%	33.4	0.7%	10.7x	3.7x	WALTONHIL	127,657	3.6%	4.8	12.7x	1.0x
Pharmaceutical	3,126	3,122	+3.85	+0.12%	34	590,123	8.5%	455.0	9.5%	10.8x	1.5x	MARICO	86,178	2.4%	5.0	7.7x	18.7x
Fuel & Power	1,114	1,108	+6.25	+0.56%	23	294,064	4.2%	152.3	3.2%	9.5x	0.6x	BERGERPBL	73,350	2.1%	15.3	15.7x	3.4x
Cement	2,035	2,029	+5.50	+0.27%	7	95,741	1.4%	54.8	1.1%	22.2x	2.2x	UPGDCL	68,404	1.9%	1.6	7.4x	1.4x
Services & Real Estate	1,171	1,172	-1.51	-0.13%	9	63,692	0.9%	262.1	5.5%	25.9x	0.5x	BXPHARMA	64,329	1.8%	41.6	7.4x	1.1x
Engineering	2,637	2,646	-9.07	-0.34%	42	295,561	4.2%	386.8	8.0%	16.7x	0.9x	PUBALIBANK	60,126	1.7%	20.2	5.0x	0.8x
Food & Allied	12,783	12,772	+11.87	+0.09%	21	233,370	3.4%	227.4	4.7%	34.2x	3.5x	CITYBANK	53,182	1.5%	95.9	3.5x	0.8x
IT	2,481	2,475	+6.51	+0.26%	11	32,856	0.5%	134.6	2.8%	42.7x	2.0x	RENATA	53,082	1.5%	7.1	19.4x	1.4x
Textile	1,412	1,411	+1.35	+0.10%	58	146,914	2.1%	1,214.3	25.3%	NM	1.0x	DUTCHBANGL	46,286	1.3%	8.6	3.6x	0.7x
Paper & Printing	4,588	4,570	+18.92	+0.41%	6	21,492	0.3%	35.9	0.7%	NM	1.4x	ISLAMIBANK	43,953	1.2%	0.8	NM	0.8x
Tannery	2,139	2,145	-5.86	-0.27%	6	24,836	0.4%	33.6	0.7%	NM	1.5x	EBL	39,120	1.1%	6.6	4.3x	0.8x
Jute	13,218	13,305	-86.26	-0.65%	3	2,883	0.0%	16.4	0.3%	NM	1.8x	UNILEVERCL	38,795	1.1%	0.5	63.4x	23.8x
Ceramics	482	486	-4.10	-0.84%	5	21,769	0.3%	57.7	1.2%	NM	1.4x	ICB	36,251	1.0%	1.4	NM	1.4x
Miscellaneous	2,561	2,559	+2.72	+0.11%	15	139,079	2.0%	232.4	4.8%	39.9x	1.1x	PRIMEBANK	35,827	1.0%	14.2	3.9x	0.8x
Corporate Bond**	18,256	18,212	+44.34	+0.24%	16	40,390	0.6%	1.6	0.0%	NM	NM	BSRMSTEEL	34,174	1.0%	13.6	5.6x	0.9x
Treasury Bond**	2,201	2,203	-1.60	-0.07%	232	3,381,403	48.6%	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
MEGCONMILK	38.5	+10.0%	17.5	NM	NM	SQURPHARMA	107,879	7.2%	7.5x	1.3x	SHARPIND	29.7	-10.0%	253.0	NM	3.8x
FAMILYTEX	2.5	+8.7%	3.8	NM	0.2x	BRACBANK	75,920	5.1%	6.2x	1.2x	SAIHAMTEX	32.0	+1.3%	231.4	51.6x	0.7x
PHOENIXFIN	3.9	+8.3%	0.4	6.4x	NM	BXPHARMA	44,947	3.0%	7.4x	1.1x	BRACBANK	61.6	-1.6%	190.2	6.2x	1.2x
CNATEX	3.2	+6.7%	1.7	40.0x	NM	ISLAMIBANK	43,874	2.9%	NM	0.8x	SAPORTL	60.4	-0.7%	153.6	28.5x	1.7x
GQBALLPEN	560.8	+4.8%	26.9	NM	4.0x	WALTONHIL	42,012	2.8%	12.7x	1.0x	RUNNERAUTO	49.3	-4.5%	117.0	36.8x	0.7x
RELIANCE1	13.7	+4.58%	47.6	NM	1.2x	PUBALIBANK	40,964	2.7%	5.0x	0.8x	MLDYEING	12.9	+0.8%	101.0	NM	1.1x
FEKDIL	23.5	+4.4%	67.4	NM	1x	CITYBANK	37,031	2.5%	3.5x	0.8x	CITYBANK	30.4	-0.7%	95.9	3.5x	0.8x
GOLDENSON	14.1	+4.4%	7.7	NM	1.0x	BATBC	33,979	2.3%	22.1x	2.2x	BEXIMCO	24.0	-0.8%	92.7	NM	0.3x
STANDBANKL	4.7	+4.4%	1.1	11.2x	0.3x	GP	32,988	2.2%	9.4x	5.9x	LOVELLO	61.1	-3.8%	85.2	20.0x	4.5x
DELTASPINN	7.2	+4.3%	3.6	NM	0.6x	EBL	26,821	1.8%	4.3x	0.8x	FARCHEM	17.0	-4.0%	77.6	NM	0.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,856	1.7%	19.4x	1.4x						
SHARPIND	29.7	-10.0%	253.0	NM	3.8x	LHB	22,790	1.5%	12.6x	3.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CAPITECGBF	9.3	-9.7%	31.4	NM	1x	PRIMEBANK	22,381	1.5%	3.9x	0.8x	SOUTHEASTB	12.2	12.2	6.0	4,970	60.63
SANDHANINS	25.6	-6.5%	6.9	NM	NM	UCB	19,025	1.3%	3.8x	0.5x	ALARABANK	18.6	18.6	3.0	3,005	55.89
TUNGHAI	4.3	-6.5%	6.9	NM	NM	OLYMPIC	18,229	1.2%	15.3x	2.2x	SHARPIND	33.0	29.7	8.0	827	25.04
FIRSTFIN	4.6	-6.1%	0.3	NM	NM	UTTARABANK	17,694	1.2%	NM	0.8x	DAFODILCOM	160.5	160.2	19.0	131	21.04
FUWANGFOOD	9.4	-6.0%	16.6	NM	4.1x	ALARABANK	17,305	1.2%	22.7x	0.8x	ASIATICLAB	119.9	119.9	1.0	162	19.42
PRIMETEX	14.9	-5.1%	0.5	NM	0.2x	ROBI	16,080	1.1%	15.4x	2.5x	FEKDIL	22.6	22.6	2.0	700	15.82
AAMRANET	19.7	-4.8%	9.4	NM	0.8x	BSRMLTD	15,758	1.0%	4.6x	0.6x	APEXSPINN	360.5	360.0	2.0	39	14.19
RUNNERAUTO	49.3	-4.5%	117.0	36.8x	0.7x	BEXIMCO	15,142	1.0%	NM	0.3x	SAIHAMTEX	31.7	31.7	2.0	350	11.10
FARCHEM	17.0	-4.0%	77.6	NM	0.6x						SAMORITA	110.0	110.0	1.0	95	10.45
											BRACBANK	62.0	62.0	1.0	90	5.56
						* Bank and NBFI sector PE calculation methodology has been modified. ** 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										

* Bank and NBFI sector PE calculation methodology has been modified.

** 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
SOUTHEASTB	12.2	12.2	60.6	4,970	6	
ALARABANK	18.6	18.6	55.9	3,005	3	
SHARPIND	33.0	29.7	25.0	827	8	
DAFODILCOM	160.5	160.2	21.0	131	19	
ASIATICLAB	119.9	119.9	19.4	162	1	
FEKDIL	22.6	22.6	15.8	700	2	
APEXSPINN	360.5	360.0	14.2	39	2	
SAIHAMTEX	31.7	31.7	11.1	350	2	
SAMORITA	110.0	110.0	10.5	95	1	
BRACBANK	62.0	62.0	5.6	90	1	
CAPITECGBF	11.3	11.3	4.5	399	2	
RELIANCE1	11.8	11.8	3.7	316	1	
GQBALLPEN	520.0	520.0	2.6	5	1	
DOMINAGE	69.4	69.4	2.1	30	1	
BNICL	120.0	118.5	2.0	17	2	
GLOBALINS	47.7	47.7	1.6	33	1	
PEOPLESINS	68.8	68.8	1.2	17	2	
FBFIF	3.7	3.7	0.7	200	1	
SINOBANGLA	56.1	56.1	0.6	11	1	
PIONEERINS	74.3	74.3	0.6	8	1	
SQUARETEXT	53.7	53.7	0.5	10	1	
Total			259.3		59	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MIDASFIN		0.0%	0.0%	Record Date	2-Sep-26
GRAMEENS2		0.0%	9.0%	Record Date	2-Sep-26
ICBSONAL1		0.0%	0.0%	Record Date	7-Sep-26
ICBAGRANI1		0.0%	4.0%	Record Date	7-Sep-26
RELIANCE1		0.0%	10.0%	Record Date	7-Sep-26
PRIME1ICBA		0.0%	0.0%	Record Date	7-Sep-26
ICB3RDNRB		0.0%	0.0%	Record Date	7-Sep-26
ICBAMCL2ND		0.0%	0.0%	Record Date	7-Sep-26
IFILISLMF1		0.0%	0.0%	Record Date	7-Sep-26
ICBEPMF1S1		0.0%	0.0%	Record Date	7-Sep-26
PF1STMF		0.0%	0.0%	Record Date	7-Sep-26

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.