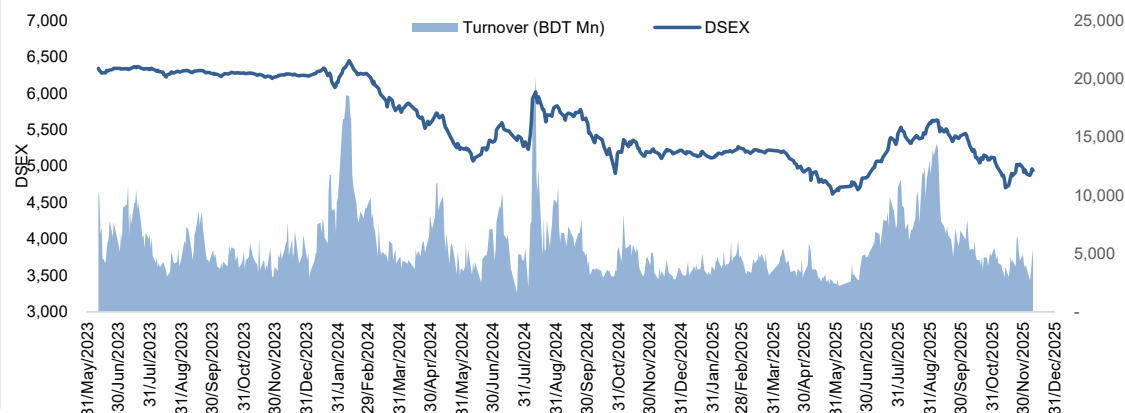


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.42%) lost 21.06 points and closed at 4,941.84. The blue-chip index DS30 (-0.45%), the Shariah-based index DSES (-0.72%), and the large-cap index CDSET (-0.33%) closed at 1,899.10, 1,031.73, and 1,022.92 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 0.88% followed by Food & Allied (-0.79%), Fuel & Power (-0.75%), Engineering (-0.54%), NBFI (-0.42%), Pharmaceutical (-0.23%), and Bank (-0.23%), respectively. Block trades contributed 9.7% of the overall market turnover. Dominage Steel Building Systems Limited (0.0%) was the most traded share with a turnover of BDT 189 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,941.84	4,962.90	-21.06	-0.42%	-5.3%
DS30	1,899.10	1,907.77	-8.67	-0.45%	-2.1%
DSES	1,031.73	1,039.23	-7.50	-0.72%	-11.7%
CDSET	1,022.92	1,026.35	-3.43	-0.33%	-4.0%

	Advanced	Declined	Unchanged	Total
All Category	114	227	53	394
A Category (Equity)	62	123	32	217
B Category (Equity)	13	59	8	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	39	45	13	97
Mutual Funds	10	10	15	35
Corporate Bonds	2	0	0	2
Treasury Bonds	2	4	0	6

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,835,094	6,848,511	-0.2%
	Mn USD	55,905	56,015	
Turnover	Mn BDT	5,339	4,580	+16.6%
	Mn USD	44	37	
Volume	Mn Shares	170	156	+9.5%
	No. of Trade	170,115	164,839	+3.2%

* Average Interbank Exchange Rate is BDT 122.26 as of Dec 10, 2025

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Figure: Sectorial Turnover (BDT Mn)

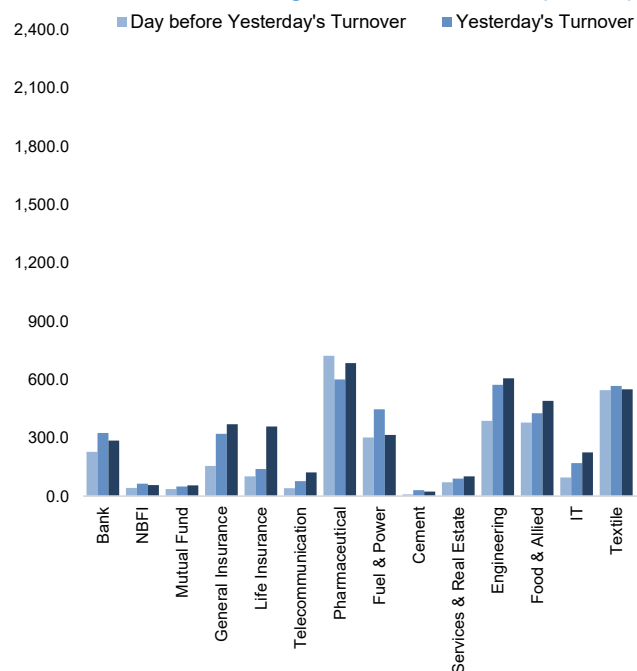
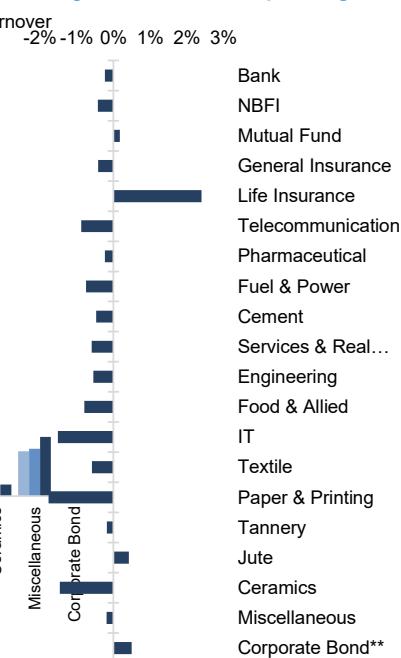


Figure: Sectorial Mcap Change



Market PE 13.9x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Life Insurance, several NBFI 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	1,390	1,394	-3.23	-0.23%	36	657,896	9.8%	285.8	5.9%	NM	1.0x	GP	364,311	11.0%	69.3	12.4x	7.3x
NBFI	892	895	-3.77	-0.42%	23	84,961	1.3%	57.4	1.2%	NM	NM	SQURPHARMA	178,531	5.4%	95.5	7.1x	1.2x
Mutual Fund	493	493	+0.88	+0.18%	37	23,647	0.4%	56.0	1.2%	NM	0.5x	ROBI	149,281	4.5%	44.4	16.2x	2.2x
General Insurance	2,867	2,879	-11.91	-0.41%	43	81,816	1.2%	370.4	7.7%	13.5x	1.2x	BATBC	135,054	4.1%	19.8	11.8x	2.4x
Life Insurance	1,723	1,683	+40.40	+2.40%	15	45,838	0.7%	358.3	7.4%	NM	NM	BRACBANK	132,197	4.0%	34.9	8.4x	1.3x
Telecommunication	4,584	4,625	-40.59	-0.88%	3	537,552	8.0%	121.7	2.5%	13.2x	4.0x	WALTONHIL	125,824	3.8%	3.9	11.1x	0.9x
Pharmaceutical	2,829	2,836	-6.66	-0.23%	34	536,352	8.0%	684.5	14.2%	11.5x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,028	1,036	-7.73	-0.75%	23	272,296	4.1%	314.1	6.5%	8.8x	0.6x	MARICO	85,636	2.6%	5.6	13.8x	28.7x
Cement	1,816	1,825	-8.51	-0.47%	7	86,544	1.3%	23.5	0.5%	20.9x	1.9x	BERGERPBL	69,058	2.1%	0.9	21.6x	3.9x
Services & Real Estate	965	971	-5.74	-0.59%	9	53,097	0.8%	102.3	2.1%	16.9x	0.4x	UPGCL	68,868	2.1%	3.9	6.4x	1.5x
Engineering	2,326	2,339	-12.73	-0.54%	42	262,122	3.9%	605.9	12.6%	13.6x	0.7x	LHB	57,256	1.7%	13.0	14.1x	3.0x
Food & Allied	13,040	13,143	-103.69	-0.79%	21	239,010	3.6%	490.8	10.2%	19.1x	3.6x	BXPHARMA	49,117	1.5%	31.8	7.7x	1.0x
IT	1,714	1,740	-26.35	-1.51%	11	22,604	0.3%	225.1	4.7%	23.8x	1.4x	RENATA	45,844	1.4%	3.9	19.4x	1.3x
Textile	1,055	1,062	-6.23	-0.59%	58	110,268	1.6%	550.3	11.4%	81.3x	0.7x	UNILEVERCL	41,704	1.3%	0.1	57.7x	20.1x
Paper & Printing	4,489	4,569	-80.64	-1.76%	6	20,279	0.3%	127.5	2.6%	NM	1.1x	PUBALIBANK	38,653	1.2%	12.3	6.2x	0.5x
Tannery	1,836	1,840	-3.30	-0.18%	6	21,260	0.3%	43.8	0.9%	NM	1.4x	DUTCHBANGL	37,411	1.1%	2.4	7.6x	0.7x
Jute	12,389	12,337	+52.15	+0.42%	3	2,727	0.0%	4.0	0.1%	NM	NM	CITYBANK	37,118	1.1%	58.7	2.8x	0.6x
Ceramics	380	386	-5.63	-1.46%	5	17,053	0.3%	59.8	1.2%	NM	1.1x	EBL	36,385	1.1%	6.1	4.6x	0.8x
Miscellaneous	3,905	3,912	-7.19	-0.18%	15	212,220	3.2%	304.4	6.3%	99.5x	1.7x	PRIMEBANK	34,121	1.0%	20.9	3.9x	0.8x
Corporate Bond**	16,780	16,696	+83.11	+0.50%	16	37,045	0.6%	0.3	0.0%	NM	NM	ICB	32,696	1.0%	2.7	NM	1.1x
Treasury Bond**	2,221	2,222	-0.93	-0.04%	233	3,398,091	50.5%	34.3	0.7%	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
FASFIN	0.9	+10.3%	0.6	NM	NM	SQURPHARMA	104,510	7.3%	7.1x	1.2x	DOMINAGE	27.1	-	188.7	NM	1.6x
NORTHERN	112.9	+9.9%	1.5	NM	1.4x	BRACBANK	73,520	5.2%	8.4x	1.3x	ORIONINFU	383.6	+0.2%	142.4	NM	23.1x
TILIL	46.2	+9.7%	98.0	10.0x	NM	BEXIMCO	69,465	4.9%	NM	1.3x	KBPPWBIL	55.8	-4.1%	141.6	NM	4.6x
HRTEX	18.4	+8.9%	6.7	NM	6.2x	ISLAMIBANK	62,516	4.4%	NM	0.8x	BDTHAIFOOD	16.5	+7.1%	127.6	NM	1.4x
MEGHNACEM	31.5	+8.2%	0.5	NM	NM	WALTONHIL	50,579	3.6%	11.1x	0.9x	ASIATICLAB	55.7	+2.2%	126.4	18.0x	1.0x
FIRSTFIN	2.8	+7.69%	0.9	NM	NM	GP	38,875	2.7%	12.4x	7.3x	ACMEPL	16.8	-4.0%	110.4	NM	1.0x
BDTHAIFOOD	16.5	+7.1%	127.6	NM	1x	BATBC	36,336	2.6%	11.8x	2.4x	SIMTEX	22.9	-1.3%	109.9	22.7x	1.0x
SHURWID	4.8	+6.7%	0.1	NM	0.4x	BXPHARMA	34,505	2.4%	7.7x	1.0x	MONNOFABR	20.9	-0.5%	107.0	NM	0.8x
UNIONCAP	3.2	+6.7%	0.3	NM	NM	PUBALIBANK	25,230	1.8%	6.2x	0.5x	TILIL	46.2	+9.7%	98.0	10.0x	NM
BIFC	1.8	+5.9%	0.2	NM	NM	CITYBANK	25,210	1.8%	2.8x	0.6x	SQURPHARMA	201.4	-0.2%	95.5	7.1x	1.2x
						RENATA	25,107	1.8%	19.4x	1.3x						
						LHB	21,812	1.5%	14.1x	3.0x						
						PRIMEBANK	20,145	1.4%	3.9x	0.8x						
						OLYMPIC	19,861	1.4%	13.7x	2.1x						
						ALARABANK	15,936	1.1%	43.1x	0.8x						
						ROBI	15,347	1.1%	16.2x	2.2x						
						UTTARABANK	14,718	1.0%	NM	0.7x						
						BEACONPHAR	14,601	1.0%	22.5x	3.5x						
						UCB	13,924	1.0%	4.1x	0.4x						
						BSRMLTD	13,247	0.9%	3.7x	0.5x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FAMILYTEX	1.1	-8.3%	1.2	NM	0.1x						PTL	52.0	49.0	3.0	4,006	208.21
SHYAMPSUG	209.7	-6.5%	32.7	NM	NM						BERGERPBL	1,320.7	1,320.7	1.0	25	33.02
ICBAMCL2ND	5.6	-4.3%	0.3	NM	4.1x						BERGERPBL	1,320.7	1,320.7	1.0	25	33.02
ANLIMAYARN	19.9	-4.3%	0.3	NM	4.1x						SQURPHARMA	219.5	201.0	5.0	145	29.29
DESHBANDHU	16.2	-4.1%	10.1	NM	1.2x						BSCPLC	123.0	122.0	5.0	173	21.09
KTL	11.6	-4.1%	24.4	NM	0.8x						CITYGENINS	72.0	71.0	6.0	257	18.29
KBPPWBIL	55.8	-4.1%	141.6	NM	4.6x						QGBALLPEN	400.0	400.0	1.0	39	15.50
ACMEPL	16.8	-4.0%	110.4	NM	1.0x						FINEFOODS	323.2	321.0	3.0	47	15.24
BARKAPOWER	7.2	-4.0%	0.8	6.9x	0.3x						ORIONINFU	365.0	358.0	7.0	31	11.19
NTC	176.6	-3.9%	0.8	NM	NM						UNILEVERCL	2,084.2	2,084.2	1.0	5	11.15

* 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
PTL	52.0	49.0	208.2	4,006	3	
BERGERPBL	1,320.7	1,320.7	33.0	25	1	
BERGERPBL	1,320.7	1,320.7	33.0	25	1	
SQURPHARMA	219.5	201.0	29.3	145	5	
BSCPLC	123.0	122.0	21.1	173	5	
CITYGENINS	72.0	71.0	18.3	257	6	
GQBALLPEN	400.0	400.0	15.5	39	1	
FINEFOODS	323.2	321.0	15.2	47	3	
ORIONINFU	365.0	358.0	11.2	31	7	
UNILEVERCL	2,084.2	2,084.2	11.2	5	1	
SPCL	49.1	49.1	11.1	227	3	
ASIATICLAB	59.8	51.1	10.2	185	7	
ACMEPL	18.9	18.9	9.5	500	2	
PRIMEBANK	28.0	28.0	7.0	250	1	
CITYBANK	24.1	24.1	6.0	250	1	
AL-HAJTEX	134.0	132.0	5.6	42	5	
LHB	46.0	46.0	5.1	111	2	
NATLIFEINS	96.4	96.4	5.0	52	1	
LOVELLO	68.0	67.5	2.5	38	3	
SIPLC	51.6	51.6	2.5	48	1	
SALVO	31.2	30.4	2.2	71	4	
SONALILIFE	68.6	68.6	1.8	26	1	
Total			519.0		97	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ECABLES		0.0%	0.0%	Record Date	14-Dec-25
BDTHAI		0.0%	0.0%	Record Date	14-Dec-25
SILCOPHL		0.0%	1.1%	Record Date	15-Dec-25
FORTUNE		0.0%	0.5%	Record Date	15-Dec-25
GOLDENSON		0.0%	0.0%	Record Date	15-Dec-25
CVOPRL		9.0%	11.0%	Record Date	17-Dec-25
SAMATALETH		0.0%	0.0%	Record Date	18-Dec-25
LRBDL		0.0%	0.0%	Record Date	21-Dec-25
GENEXIL		0.0%	1.0%	Record Date	21-Dec-25
EASTRNLAB		50.0%	80.0%	Record Date	22-Dec-25
GPHISPAT		0.0%	5.0%	Record Date	23-Dec-25
KBPPWBIL		0.0%	10.0%	Record Date	24-Dec-25
BSC		0.0%	25.0%	Record Date	24-Dec-25
GHCL		0.0%	0.0%	Record Date	29-Dec-25
OIMEX		0.0%	0.0%	Record Date	30-Dec-25
ALLTEX		0.0%	0.0%	Record Date	7-Jan-26

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