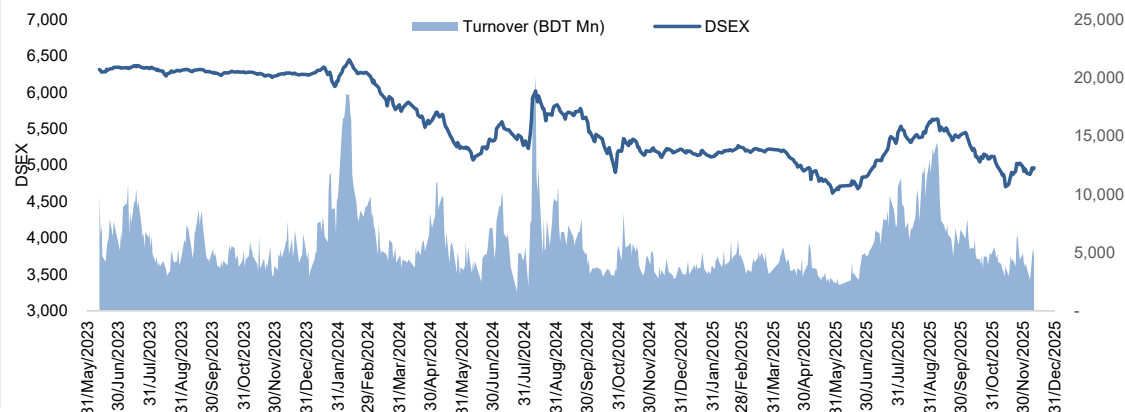


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.44%) gained 21.99 points and closed at 4,963.83. The blue-chip index DS30 (+0.22%), the Shariah-based index DSES (+0.27%), and the large-cap index CDSET (+0.02%) closed at 1,903.29, 1,034.47, and 1,023.09 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.09% followed by Food & Allied (+0.95%), Engineering (+0.67%), Pharmaceutical (+0.39%), Bank (+0.17%), Fuel & Power (-0.33%), and Telecommunication (-1.06%), respectively. Block trades contributed 5.1% of the overall market turnover. Simtex Industries Limited (+0.9%) was the most traded share with a turnover of BDT 156 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,963.83	4,941.84	+21.99	+0.44%	-4.8%
DS30	1,903.29	1,899.10	+4.19	+0.22%	-1.9%
DSES	1,034.47	1,031.73	+2.74	+0.27%	-11.5%
CDSET	1,023.09	1,022.92	+0.17	+0.02%	-4.0%

	Advanced	Declined	Unchanged	Total
All Category	262	64	66	392
A Category (Equity)	144	36	35	215
B Category (Equity)	70	3	7	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	48	25	24	97
Mutual Funds	11	3	21	35
Corporate Bonds	2	1	0	3
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,863,682	6,835,094	+0.4%
	Mn USD	56,139	55,905	
Turnover	Mn BDT	4,638	5,339	-13.1%
	Mn USD	38	44	
Volume	Mn Shares	156	170	-8.4%
	No. of Trade	158,307	170,115	

* Average Interbank Exchange Rate is BDT 122.26 as of Dec 11, 2025

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Figure: Sectorial Turnover (BDT Mn)

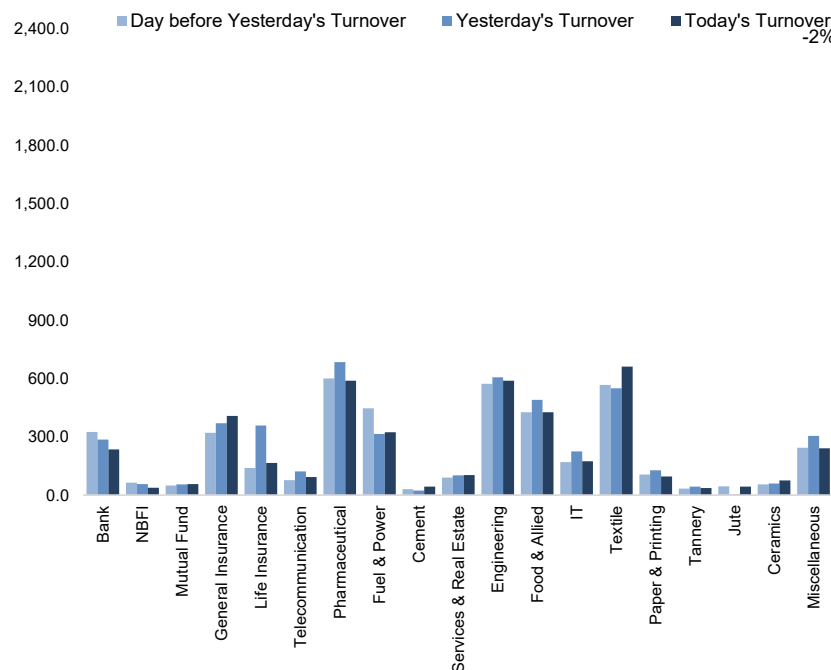
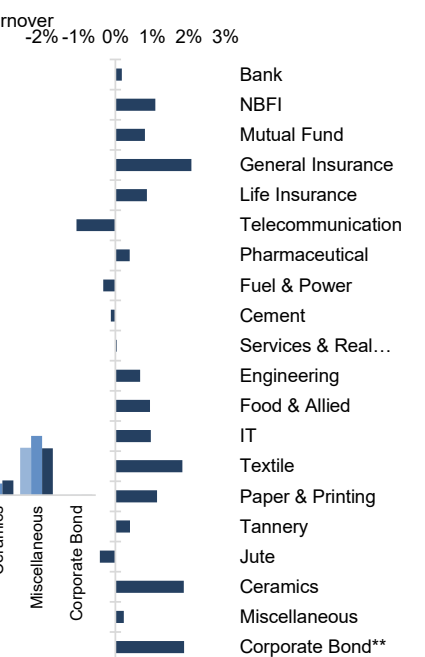


Figure: Sectorial Mcap Change



Market PE 14.0x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Life Insurance, several 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	1,393	1,390	+2.43	+0.17%	36	659,044	9.8%	235.5	5.4%	NM	1.0x	GP	358,505	10.8%	62.6	12.2x	7.2x
NBFI	901	892	+9.72	+1.09%	23	85,887	1.3%	38.6	0.9%	NM	NM	SQURPHARMA	178,531	5.4%	48.8	7.1x	1.2x
Mutual Fund	497	493	+3.97	+0.80%	37	23,837	0.4%	57.3	1.3%	NM	0.5x	ROBI	149,281	4.5%	25.2	16.2x	2.2x
General Insurance	2,926	2,867	+59.44	+2.07%	43	83,512	1.2%	407.2	9.3%	13.8x	1.2x	BATBC	135,648	4.1%	19.7	11.8x	2.4x
Life Insurance	1,738	1,723	+14.84	+0.86%	15	46,233	0.7%	165.8	3.8%	NM	NM	BRACBANK	132,397	4.0%	46.7	8.4x	1.3x
Telecommunication	4,536	4,584	-48.72	-1.06%	3	531,839	7.9%	93.0	2.1%	13.1x	4.0x	WALTONHIL	125,891	3.8%	3.0	11.1x	0.9x
Pharmaceutical	2,840	2,829	+11.00	+0.39%	34	538,439	8.0%	588.1	13.4%	11.5x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,025	1,028	-3.39	-0.33%	23	271,399	4.0%	323.7	7.4%	8.8x	0.6x	MARICO	85,557	2.6%	21.2	13.8x	28.7x
Cement	1,814	1,816	-2.30	-0.13%	7	86,434	1.3%	43.9	1.0%	20.8x	1.9x	BERGERPBL	69,171	2.1%	3.2	21.7x	4.0x
Services & Real Estate	966	965	+0.39	+0.04%	9	53,118	0.8%	102.6	2.3%	16.9x	0.4x	UPGCL	68,752	2.1%	2.0	6.4x	1.5x
Engineering	2,342	2,326	+15.62	+0.67%	42	263,882	3.9%	588.5	13.4%	13.8x	0.7x	LHB	56,791	1.7%	38.1	14.0x	3.0x
Food & Allied	13,163	13,040	+123.38	+0.95%	21	241,272	3.6%	426.3	9.7%	19.3x	3.6x	BXPHARMA	49,518	1.5%	12.0	7.7x	1.0x
IT	1,730	1,714	+16.63	+0.97%	11	22,823	0.3%	173.8	3.9%	24.1x	1.4x	RENATA	46,223	1.4%	8.7	19.5x	1.3x
Textile	1,075	1,055	+19.27	+1.83%	58	112,282	1.7%	661.5	15.0%	82.8x	0.7x	UNILEVERCL	42,342	1.3%	0.1	58.6x	20.5x
Paper & Printing	4,540	4,489	+51.07	+1.14%	6	20,509	0.3%	96.2	2.2%	NM	1.1x	PUBALIBANK	39,043	1.2%	5.6	6.3x	0.5x
Tannery	1,844	1,836	+7.33	+0.40%	6	21,345	0.3%	37.0	0.8%	NM	1.4x	DUTCHBANGL	37,701	1.1%	4.2	7.7x	0.7x
Jute	12,337	12,389	-52.57	-0.42%	3	2,716	0.0%	44.3	1.0%	NM	NM	CITYBANK	36,966	1.1%	35.1	2.8x	0.6x
Ceramics	387	380	+7.10	+1.87%	5	17,371	0.3%	75.4	1.7%	NM	1.1x	EBL	36,704	1.1%	10.0	4.6x	0.8x
Miscellaneous	3,914	3,905	+8.97	+0.23%	15	212,708	3.2%	240.6	5.5%	99.7x	1.7x	PRIMEBANK	34,586	1.0%	7.8	4.0x	0.8x
Corporate Bond**	17,093	16,780	+313.88	+1.87%	16	37,738	0.6%	0.3	0.0%	NM	NM	ICB	33,303	1.0%	2.6	NM	1.1x
Treasury Bond**	2,232	2,221	+11.66	+0.53%	233	3,417,831	50.6%	0.4	0.0%	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
YPL	18.3	+9.6%	27.0	NM	3.4x	SQURPHARMA	104,510	7.3%	7.1x	1.2x	SIMTEX	23.1	+0.9%	156.2	22.9x	1.0x
VFSTDL	11.8	+9.3%	30.4	98.3x	0.6x	BRACBANK	73,520	5.2%	8.4x	1.3x	ORIONINFU	372.2	-3.0%	135.1	NM	22.4x
DESHBANDHU	17.7	+9.3%	29.0	NM	1.3x	BEXIMCO	69,465	4.9%	NM	1.3x	MONNOFABR	22.7	+8.6%	116.8	NM	0.9x
FAMILYTEX	1.2	+9.1%	0.9	NM	0.1x	ISLAMIBANK	62,516	4.4%	NM	0.8x	BDTHAIFOOD	16.5	-	116.0	NM	1.4x
MONNOAGML	339.6	+8.7%	19.8	NM	3.1x	WALTONHIL	50,579	3.6%	11.1x	0.9x	DOMINAGE	28.3	+4.4%	106.9	NM	1.7x
MONNOFABR	22.7	+8.61%	116.8	NM	0.9x	GP	38,875	2.7%	12.2x	7.2x	ACMEPL	17.5	+4.2%	93.4	NM	1.1x
MEGHNAINS	28.8	+8.3%	31.2	21.0x	2x	BATBC	36,336	2.6%	11.8x	2.4x	ANWARGALV	92.9	+3.0%	84.6	NM	21.9x
1JANATAMF	2.8	+7.7%	4.8	NM	0.3x	BXPHARMA	34,505	2.4%	7.7x	1.0x	LOVELLO	70.8	+0.3%	81.5	40.3x	5.7x
SHEPHERD	14.3	+7.5%	26.9	NM	1.1x	PUBALIBANK	25,230	1.8%	6.3x	0.5x	KBPPWBIL	56.5	+1.3%	81.1	NM	4.6x
OIMEX	16.7	+7.1%	17.7	53.9x	5.6x	CITYBANK	25,210	1.8%	2.8x	0.6x	ASIATICLAB	56.5	+1.4%	72.2	18.3x	1.0x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	19.5x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MPETROLEUM	192.1	-8.1%	69.3	3.1x	0.7x	LHB	21,812	1.5%	14.0x	3.0x	FINEFOODS	358.0	324.0	19.0	268	89.50
PRIMEFIN	1.2	-7.7%	0.3	NM	0x	PRIMEBANK	20,145	1.4%	4.0x	0.8x	SONALILIFE	70.6	70.6	4.0	325	22.91
FASFIN	0.8	-5.8%	0.7	NM	0.2x	OLYMPIC	19,861	1.4%	14.0x	2.2x	SONALILIFE	70.6	70.6	4.0	325	22.91
HFL	6.5	-5.8%	0.7	NM	0.2x	ALARABANK	15,936	1.1%	42.8x	0.8x	UTTARABANK	21.5	21.5	1.0	925	19.89
GSPFINANCE	1.7	-5.6%	1.3	NM	NM	ROBI	15,347	1.1%	16.2x	2.2x	GQBALLPEN	451.0	400.0	3.0	41	18.31
NURANI	2.1	-4.5%	0.3	NM	0.2x	UTTARABANK	14,718	1.0%	NM	0.7x	ACMELAB	78.6	78.6	1.0	106	8.33
GENNEXT	2.3	-4.2%	1.7	NM	0.2x	BEACONPHAR	14,601	1.0%	22.3x	3.4x	ISLAMIBANK	36.6	36.6	3.0	220	8.05
SAPORTL	39.9	-4.1%	58.0	15.1x	1.1x	UCB	13,924	1.0%	4.1x	0.4x	DOMINAGE	27.3	24.4	2.0	218	5.38
SHYAMPSUG	202.5	-3.4%	19.4	NM	NM	BSRMLTD	13,247	0.9%	3.7x	0.5x	SHYAMPSUG	208.7	191.5	5.0	21	4.19
MEGCONMILK	15.4	-3.1%	0.2	NM	NM	* 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					ASIATICLAB	61.0	54.5	3.0	69	4.12

* 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
FINEFOODS	358.0	324.0	89.5	268	19
SONALILIFE	70.6	70.6	22.9	325	4
SONALILIFE	70.6	70.6	22.9	325	4
UTTARABANK	21.5	21.5	19.9	925	1
GQBALLPEN	451.0	400.0	18.3	41	3
ACMELAB	78.6	78.6	8.3	106	1
ISLAMIBANK	36.6	36.6	8.1	220	3
DOMINAGE	27.3	24.4	5.4	218	2
SHYAMPSUG	208.7	191.5	4.2	21	5
ASIATICLAB	61.0	54.5	4.1	69	3
SUNLIFEINS	50.8	50.8	3.0	60	1
UNITEDFIN	13.0	13.0	3.0	234	1
ORIONINFU	355.0	355.0	2.8	8	1
LHB	46.0	46.0	2.7	58	1
AL-HAJTEX	135.0	135.0	2.6	19	3
CITYGENINS	85.0	85.0	2.5	29	1
JAMUNABANK	23.0	23.0	2.0	88	1
PADMAOIL	170.0	170.0	2.0	12	1
ENVOYTEX	48.0	48.0	2.0	42	1
AFTABAUTO	31.3	31.3	1.7	55	1
SAPORTL	43.0	43.0	1.3	30	1
MBL1STMF	3.5	3.5	1.2	343	1
Total			237.6		74

Important DSE News
ACI

Mr. M. Anis Ud Dowla, Chairman of the company, has further informed that he has completed his buying of 360,000 shares of the company at the prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 27.11.2025.

GPHISPAT

(Q1 Un-audited): EPS was Tk. 0.05 for July-September 2025 as against Tk. 0.14 for July-September 2024. NOCFPS was Tk. 1.74 for July-September 2025 as against Tk. (1.82) for July-September 2024. NAV per share was Tk. 51.85 as on September 30, 2025 and Tk. 51.72 as on June 30, 2025.

LRBDL

(Q1 Un-audited): EPS was Tk. (0.82) for July-September 2025 as against Tk. (0.48) for July-September 2024. NOCFPS was Tk. (0.21) for July-September 2025 as against Tk. 1.05 for July-September 2024. NAV per share (with revaluation) was Tk. 31.89 as on September 30, 2025 and Tk. 32.72 as on June 30, 2025. NAV per share (without revaluation) was Tk. 27.93 as on September 30, 2025 and Tk. 28.75 as on June 30, 2025.

CITYBANK

Ms. Meherun Haque, daughter of Late Mr. Deen Mohammad and a General Shareholder of the company, has informed that she has received 1,758,014 shares as her entitled portion of the 2024 stock dividend, as per the earlier news disseminated by DSE on 19.11.2025

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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