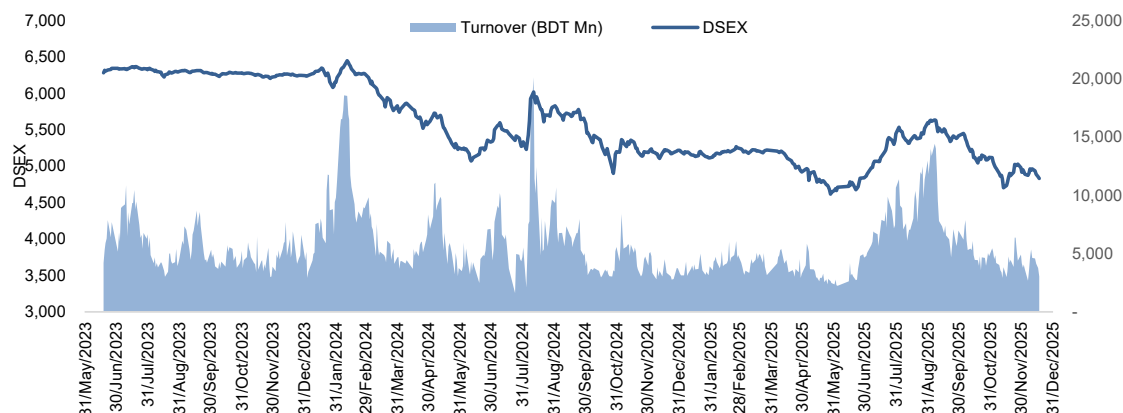


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.46%) lost 22.5 points and closed at 4,831.41. The blue-chip index DS30 (-0.50%), the Shariah-based index DSES (-0.79%), and the large-cap index CDSET (-0.40%) closed at 1,859.86, 1,000.81, and 1,003.63 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.67% followed by Fuel & Power (-0.63%), Engineering (-0.46%), Telecommunication (-0.44%), Pharmaceutical (-0.41%), Bank (-0.35%), and NBFI (-0.28%), respectively. Block trades contributed 8.0% of the overall market turnover. Monno Fabrics Limited (-2.7%) was the most traded share with a turnover of BDT 82 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,831.41	4,853.91	-22.50	-0.46%	-7.4%
DS30	1,859.86	1,869.21	-9.35	-0.50%	-4.1%
DSES	1,000.81	1,008.81	-8.00	-0.79%	-14.4%
CDSET	1,003.63	1,007.66	-4.03	-0.40%	-5.9%

	Advanced	Declined	Unchanged	Total
All Category	69	254	68	391
A Category (Equity)	37	145	32	214
B Category (Equity)	12	54	14	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	20	55	22	97
Mutual Funds	9	14	12	35
Corporate Bonds	1	1	0	2
Treasury Bonds	2	0	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,758,666	6,754,139	+0.1%
	Mn USD	55,280	55,243	
Turnover	Mn BDT	3,031	3,758	-19.3%
	Mn USD	25	31	
Volume	Mn Shares	103	134	-23.1%
No. of Trade		115,564	134,453	-14.0%

* Average Interbank Exchange Rate is BDT 122.26 as of Dec 18, 2025

Figure: Sectorial Turnover (BDT Mn)

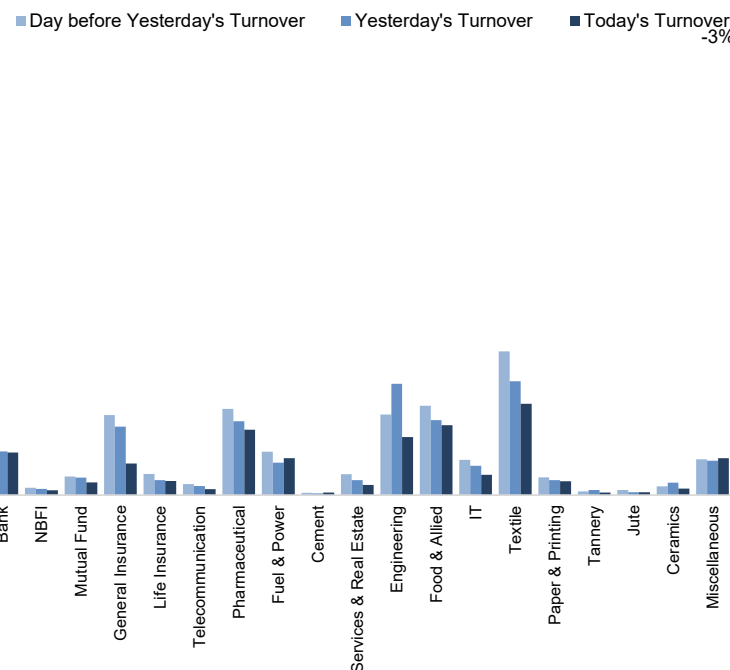
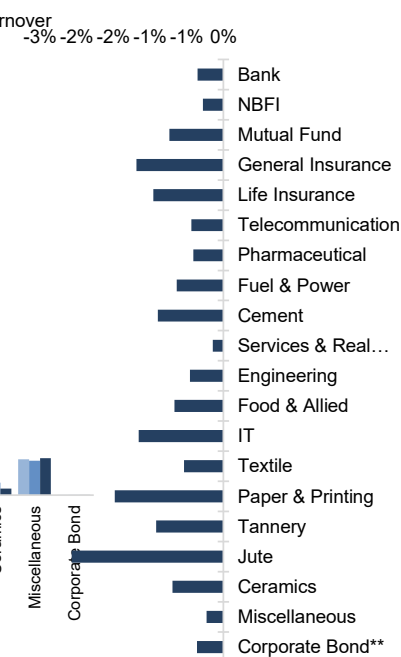


Figure: Sectorial Mcap Change



Market PE 13.7x

Market PB 1.5x

* Market P/E and P/BV calculation excludes Mutual Life Insurance, several NBFI and Banks

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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	1,355	1,360	-4.76	-0.35%	36	641,236	9.5%	218.7	7.8%	NM	7.5x	GP	349,323	10.8%	12.3	11.9x	7.0x
NBFI	860	862	-2.42	-0.28%	23	81,944	1.2%	24.7	0.9%	NM	NM	SQURPHARMA	177,202	5.5%	40.4	7.0x	1.2x
Mutual Fund	489	493	-3.63	-0.74%	37	23,435	0.3%	66.0	2.4%	NM	0.5x	ROBI	146,662	4.5%	16.8	15.9x	2.2x
General Insurance	2,799	2,833	-33.56	-1.18%	43	79,883	1.2%	163.0	5.8%	13.2x	1.2x	BATBC	133,380	4.1%	16.7	11.6x	2.3x
Life Insurance	1,628	1,644	-15.72	-0.96%	15	43,296	0.6%	73.2	2.6%	NM	NM	BRACBANK	127,220	3.9%	24.3	8.1x	1.2x
Telecommunication	4,431	4,451	-19.38	-0.44%	3	519,626	7.7%	30.7	1.1%	12.8x	3.9x	WALTONHIL	123,325	3.8%	2.9	10.9x	0.9x
Pharmaceutical	2,782	2,793	-11.44	-0.41%	34	527,415	7.8%	336.0	12.0%	11.3x	1.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Fuel & Power	994	1,000	-6.35	-0.63%	23	263,266	3.9%	190.0	6.8%	8.6x	0.5x	MARICO	84,392	2.6%	16.1	13.6x	28.3x
Cement	1,768	1,784	-15.96	-0.89%	7	84,246	1.2%	13.7	0.5%	20.3x	1.8x	BERGERPBL	68,493	2.1%	2.7	21.4x	3.9x
Services & Real Estate	935	937	-1.35	-0.14%	9	51,438	0.8%	53.0	1.9%	16.4x	0.4x	UPGDCL	67,477	2.1%	1.3	6.3x	1.5x
Engineering	2,265	2,275	-10.36	-0.46%	42	255,226	3.8%	298.2	10.7%	13.3x	0.7x	ISLAMIBANK	53,130	1.6%	11.7	NM	0.7x
Food & Allied	12,845	12,931	-86.06	-0.67%	21	235,448	3.5%	359.9	12.9%	18.8x	3.5x	BXPHARMA	47,868	1.5%	11.2	7.5x	1.0x
IT	1,639	1,659	-19.14	-1.15%	11	21,624	0.3%	104.7	3.8%	22.5x	1.3x	RENATA	45,603	1.4%	5.7	19.3x	1.3x
Textile	1,039	1,044	-5.60	-0.54%	58	108,513	1.6%	469.3	16.8%	NM	0.7x	UNILEVERCL	41,347	1.3%	0.6	57.2x	20.0x
Paper & Printing	4,230	4,294	-63.65	-1.48%	6	19,112	0.3%	71.7	2.6%	NM	1.1x	PUBALIBANK	39,043	1.2%	8.0	6.3x	0.5x
Tannery	1,785	1,802	-16.54	-0.92%	6	20,666	0.3%	13.0	0.5%	NM	1.4x	EBL	37,182	1.2%	16.4	4.7x	0.8x
Jute	11,450	11,692	-242.04	-2.07%	3	2,520	0.0%	14.6	0.5%	NM	NM	DUTCHBANGL	37,025	1.1%	2.6	7.5x	0.7x
Ceramics	370	373	-2.59	-0.69%	5	16,611	0.2%	33.2	1.2%	NM	1.1x	CITYBANK	36,509	1.1%	36.1	2.8x	0.6x
Miscellaneous	3,864	3,873	-8.83	-0.23%	15	209,984	3.1%	190.3	6.8%	98.5x	1.6x	PRIMEBANK	33,773	1.0%	11.3	3.9x	0.7x
Corporate Bond**	16,951	17,012	-61.37	-0.36%	16	37,423	0.6%	0.9	0.0%	NM	NM	ICB	32,002	1.0%	0.9	NM	1.0x
Treasury Bond**	2,295	2,208	+86.37	+3.91%	232	3,518,391	52.0%	64.0	2.3%	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
FAMILYTEX	1.2	+9.1%	0.4	NM	0.1x	SQURPHARMA	104,510	7.3%	7.0x	1.2x	MONNOFABR	21.4	-2.7%	82.2	NM	0.8x
PRIMEFIN	1.2	+9.1%	0.1	NM	0.2x	BRACBANK	73,520	5.2%	8.1x	1.2x	KBPPWBIL	47.1	-1.7%	81.4	NM	3.8x
PROGRESLIF	46.6	+5.9%	2.1	NM	NM	BEXIMCO	69,465	4.9%	NM	1.3x	SIMTEX	20.9	+2.0%	77.0	20.7x	0.9x
BDTHAIFOOD	14.4	+5.9%	49.6	NM	1.2x	ISLAMIBANK	62,516	4.4%	NM	0.7x	FINEFOODS	379.0	+0.3%	73.4	61.8x	22.0x
BIFC	1.8	+5.9%	0.0	NM	NM	WALTONHIL	50,579	3.6%	10.9x	0.9x	LOVELLO	68.0	+1.9%	72.1	38.7x	5.5x
BANGAS	130.5	+5.16%	47.7	NM	6.2x	GP	38,875	2.7%	11.9x	7.0x	DOMINAGE	28.9	-1.4%	70.3	NM	1.7x
DBH1STMF	6.8	+4.6%	4.6	NM	1x	BATBC	36,336	2.6%	11.6x	2.3x	BSC	104.3	+0.5%	67.3	5.4x	0.9x
CNATEX	2.3	+4.5%	0.1	NM	NM	BXPHARMA	34,505	2.4%	7.5x	1.0x	ORIONINFU	347.2	-2.3%	65.5	NM	20.9x
WATACHEM	134.0	+4.5%	14.1	NM	2.2x	PUBALIBANK	25,230	1.8%	6.3x	0.5x	SAIHAMCOT	19.0	-1.6%	64.9	19.0x	0.5x
ILFSL	0.7	+4.3%	0.0	NM	NM	CITYBANK	25,210	1.8%	2.8x	0.6x	BDTHAIFOOD	14.4	+5.9%	49.6	NM	1.2x
						RENATA	25,107	1.8%	19.3x	1.3x						
						LHB	21,812	1.5%	13.7x	2.9x						
						PRIMEBANK	20,145	1.4%	3.9x	0.7x						
						OLYMPIC	19,861	1.4%	13.5x	2.1x						
						ALARABANK	15,936	1.1%	40.7x	0.7x						
						ROBI	15,347	1.1%	15.9x	2.2x						
						UTTARABANK	14,718	1.0%	NM	0.7x						
						BEACONPHAR	14,601	1.0%	21.3x	3.3x						
						UCB	13,924	1.0%	4.1x	0.4x						
						BSRMLTD	13,247	0.9%	3.6x	0.4x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
CVOPRL	147.7	-10.6%	45.3	30.9x	4.6x											
RSRMSTEEL	5.5	-6.8%	0.7	NM	0x											
SHURWID	4.4	-6.1%	4.0	NM	NM											
SHYAMPUSUG	160.4	-6.1%	4.0	NM	NM											
NURANI	1.9	-5.0%	0.0	NM	0.2x											
SKTRIMS	7.6	-5.0%	0.5	NM	0.5x											
APOLOISPAT	2.0	-4.8%	0.5	NM	0.1x											
NITOLINS	26.4	-4.7%	0.0	9.1x	0.9x											
MEGHNAJET	20.4	-4.7%	0.1	NM	0.3x											
MIDASFIN	4.1	-4.7%	0.0	NM	410.0x											

* 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
MTB	12.3	12.3	61.5	5,000	1
GQBALLPEN	420.0	400.0	29.4	71	3
GQBALLPEN	420.0	400.0	29.4	71	3
LOVELLO	73.3	65.0	23.2	345	7
RELIANCE1	14.8	14.0	20.8	1,480	4
CITYGENINS	79.4	72.2	19.0	256	9
DOMINAGE	30.0	26.4	11.3	400	2
SALVO	32.5	29.9	7.4	237	6
ORIONINFU	338.0	337.9	7.1	21	3
BANGAS	127.0	127.0	6.4	50	2
CRYSTALINS	54.4	54.4	5.4	100	1
ASIATICLAB	52.3	51.9	2.7	52	4
ACMEPL	16.8	16.8	2.1	122	1
ROBI	28.0	28.0	2.0	73	1
JAMUNABANK	23.0	23.0	2.0	88	1
SAPORTL	42.5	42.5	2.0	47	1
AFTABAUTO	30.0	30.0	1.7	55	1
AL-HAJTEX	136.5	136.5	1.1	8	2
CLICL	51.5	51.5	0.9	18	1
CAPMBDBLMF	10.9	10.9	0.8	75	1
SQURPHARMA	219.0	219.0	0.8	4	1
SAIHAMCOT	21.2	21.2	0.7	35	1
Total			242.6		60

Important DSE News
BDCOM

Referring to their earlier news disseminated by DSE on 27.10.2025 regarding Dividend Declaration, the company has informed that, as per the decision of the Board of Directors of the company, the Stock Dividend/bonus shares shall be declared from the Retained Earnings (Revised) replacing the previous recommendation from the Share Premium.

SALVO

Mr. Md. Salam Obaidul Karim, Managing Director of the company, has completed his buying of 440,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated on 11.12.2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
LRBDL		0.0%	0.0%	Record Date	21-Dec-25
GENEXIL		0.0%	1.0%	Record Date	21-Dec-25
EASTRNLUB		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
MAKSONSPIN		0.0%	0.0%	Record Date	7-Jan-26

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