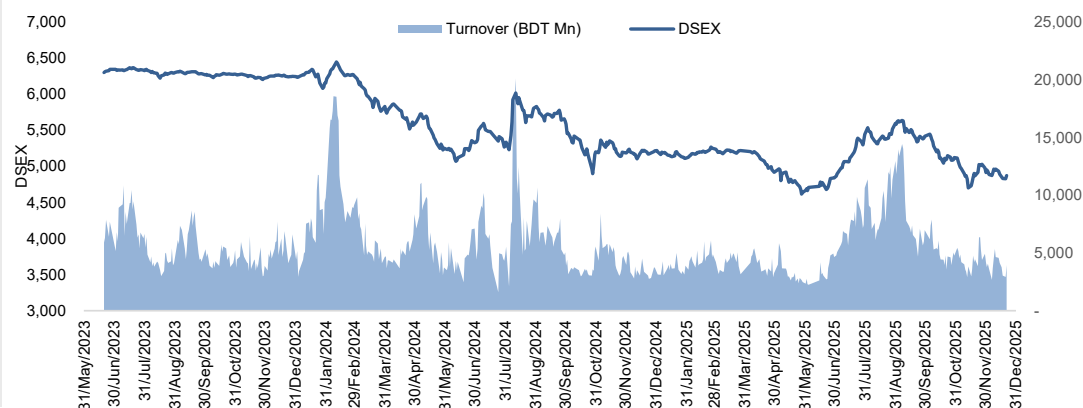


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.00%) gained 48.05 points and closed at 4,874.52. The blue-chip index DS30 (+0.96%), the Shariah-based index DSES (+0.77%), and the large-cap index CDSET (+0.66%) closed at 1,871.34, 1,006.80, and 1,007.62 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.72% followed by Food & Allied (+1.39%), Bank (+0.86%), Pharmaceutical (+0.78%), Engineering (+0.61%), Fuel & Power (+0.54%), and Telecommunication (+0.47%), respectively. Block trades contributed 5.5% of the overall market turnover. Bangladesh Shipping Corporation (+3.2%) was the most traded share with a turnover of BDT 188 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,874.52	4,826.47	+48.05	+1.00%	-6.6%
DS30	1,871.34	1,853.59	+17.75	+0.96%	-3.5%
DSES	1,006.80	999.10	+7.70	+0.77%	-13.9%
CDSET	1,007.62	1,000.98	+6.64	+0.66%	-5.5%

	Advanced	Declined	Unchanged	Total
All Category	302	37	49	388
A Category (Equity)	168	16	26	210
B Category (Equity)	65	6	10	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	69	15	13	97
Mutual Funds	18	4	13	35
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,774,534	6,782,266	-0.1%
	Mn USD	55,393	55,456	
Turnover	Mn BDT	3,959	2,932	+35.0%
	Mn USD	32	24	
Volume	Mn Shares	127	95	+34.5%
No. of Trade		131,669	112,668	+16.9%

* Average Interbank Exchange Rate is BDT 122.30 as of Dec 22, 2025

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Figure: Sectorial Turnover (BDT Mn)

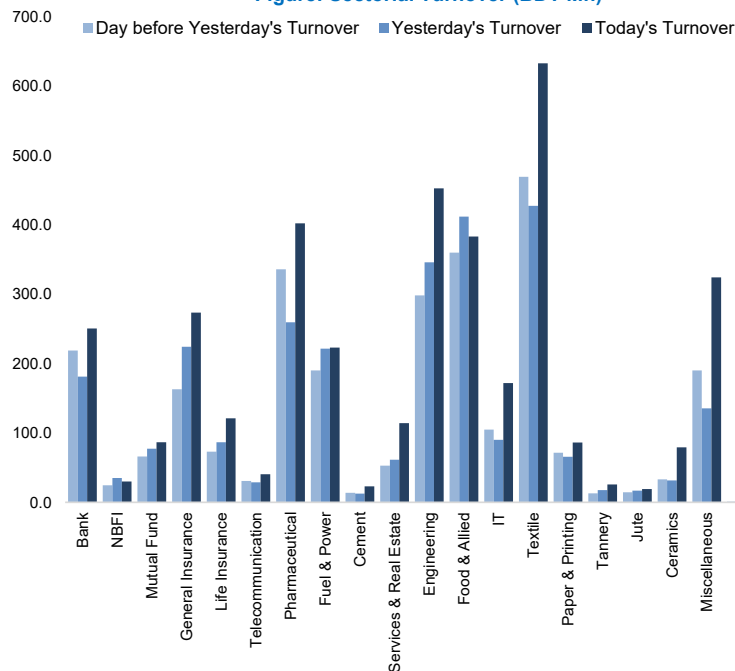
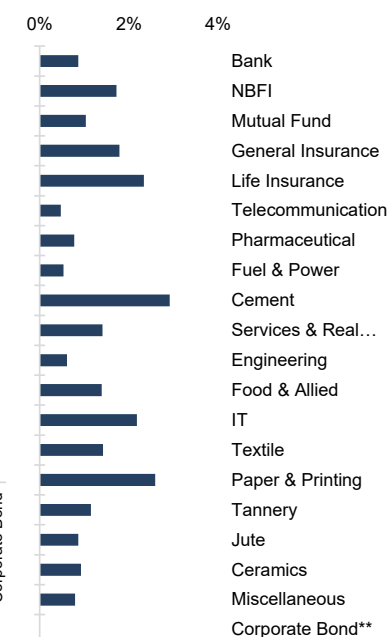


Figure: Sectorial Mcap Change



Market PE 13.8x

Market PB 1.5x

* Market P/E and P/BV calculation excludes
Mutual Fund, 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	1,364	1,352	+11.69	+0.86%	36	645,177	9.5%	250.7	6.7%	NM	7.6x	GP	349,458	10.8%	13.7	11.9x	7.0x
NBFI	871	856	+14.76	+1.72%	23	82,984	1.2%	30.1	0.8%	NM	NM	SQURPHARMA	178,531	5.5%	89.5	7.1x	1.2x
Mutual Fund	491	486	+5.03	+1.03%	37	23,551	0.3%	86.7	2.3%	NM	0.5x	ROBI	147,186	4.5%	22.7	16.0x	2.2x
General Insurance	2,856	2,806	+50.18	+1.79%	43	81,512	1.2%	273.6	7.3%	13.5x	1.2x	BATBC	134,730	4.1%	9.6	11.7x	2.4x
Life Insurance	1,661	1,623	+37.96	+2.34%	15	44,184	0.7%	121.2	3.2%	NM	NM	BRACBANK	128,216	3.9%	16.9	8.2x	1.2x
Telecommunication	4,437	4,416	+20.91	+0.47%	3	520,285	7.7%	40.4	1.1%	12.8x	3.9x	WALTONHIL	123,558	3.8%	2.5	10.9x	0.9x
Pharmaceutical	2,793	2,771	+21.53	+0.78%	34	529,448	7.8%	402.2	10.8%	11.3x	1.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Fuel & Power	1,000	995	+5.35	+0.54%	23	264,895	3.9%	223.1	6.0%	8.6x	0.5x	MARICO	83,576	2.6%	4.2	13.5x	28.0x
Cement	1,798	1,747	+51.02	+2.92%	7	85,704	1.3%	23.2	0.6%	20.7x	1.9x	BERGERPBL	68,817	2.1%	0.4	21.5x	3.9x
Services & Real Estate	947	934	+13.14	+1.41%	9	52,066	0.8%	114.3	3.1%	16.6x	0.4x	UPGDCL	67,477	2.1%	1.7	6.3x	1.5x
Engineering	2,283	2,269	+13.86	+0.61%	42	257,231	3.8%	452.8	12.1%	13.4x	0.7x	ISLAMIBANK	53,130	1.6%	17.8	NM	0.7x
Food & Allied	13,001	12,822	+178.45	+1.39%	21	238,296	3.5%	383.1	10.2%	19.0x	3.6x	BXPBARMA	47,734	1.5%	15.1	7.5x	1.0x
IT	1,677	1,641	+35.82	+2.18%	11	22,119	0.3%	171.9	4.6%	23.0x	1.4x	RENATA	45,408	1.4%	6.7	19.2x	1.3x
Textile	1,057	1,042	+14.85	+1.42%	58	110,471	1.6%	633.1	16.9%	NM	0.7x	UNILEVERCL	42,028	1.3%	0.5	58.1x	20.3x
Paper & Printing	4,366	4,256	+110.22	+2.59%	6	19,725	0.3%	86.3	2.3%	NM	1.1x	PUBALIBANK	39,043	1.2%	8.9	6.3x	0.5x
Tannery	1,820	1,799	+20.70	+1.15%	6	21,066	0.3%	25.7	0.7%	NM	1.4x	EBL	38,140	1.2%	23.9	4.8x	0.8x
Jute	11,765	11,664	+100.77	+0.86%	3	2,590	0.0%	19.2	0.5%	NM	NM	DUTCHBANGL	37,605	1.2%	1.9	7.6x	0.7x
Ceramics	374	371	+3.45	+0.93%	5	16,794	0.2%	79.3	2.1%	NM	1.1x	CITYBANK	36,661	1.1%	31.7	2.8x	0.6x
Miscellaneous	3,894	3,864	+30.70	+0.79%	15	211,637	3.1%	324.2	8.7%	99.2x	1.7x	PRIMEBANK	33,657	1.0%	11.5	3.9x	0.7x
Corporate Bond**	16,951	16,951	-	-	16	37,423	0.6%	0.0	0.0%	NM	NM	ICB	32,262	1.0%	0.7	NM	1.0x
Treasury Bond**	2,287	2,313	-25.53	-1.10%	232	3,510,002	51.8%	0.0	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
FASFIN	0.8	+9.7%	0.5	NM	NM	SQURPHARMA	99,559	7.4%	7.1x	1.2x	BSC	108.0	+3.2%	188.3	5.6x	1.0x
FAMILYTEX	1.2	+9.1%	0.6	NM	0.1x	BEXIMCO	69,465	5.1%	NM	1.3x	SAIHAMCOT	20.0	+5.3%	165.2	20.0x	0.5x
MONNOAGML	369.3	+8.7%	47.0	NM	3.3x	BRACBANK	68,804	5.1%	8.2x	1.2x	KAY&QUE	372.1	-2.3%	108.0	33.5x	3.6x
RAHIMTEXT	230.8	+8.7%	16.1	98.2x	8.5x	ISLAMIBANK	53,516	4.0%	NM	0.7x	RAHIMAFOD	155.0	+3.8%	98.1	NM	16.3x
PREMIERLEA	0.7	+8.2%	0.1	NM	NM	WALTONHIL	48,012	3.6%	10.9x	0.9x	KBPPWBIL	50.5	+5.0%	94.2	NM	4.1x
BAYLEASING	2.9	+7.41%	0.1	NM	NM	BATBC	35,450	2.6%	11.7x	2.4x	SQURPHARMA	201.4	+0.9%	89.5	7.1x	1.2x
RENWICKJA	557.1	+7.1%	0.3	NM	NM	GP	35,148	2.6%	11.9x	7.0x	SIMTEX	21.6	-0.5%	86.7	21.4x	1.0x
PDL	4.6	+7.0%	0.2	NM	0.3x	BXPBARMA	33,975	2.5%	7.5x	1.0x	SAPORTL	42.8	+4.1%	80.2	16.2x	1.2x
TUNGHAI	1.6	+6.7%	0.1	NM	NM	PUBALIBANK	28,033	2.1%	6.3x	0.5x	DOMINAGE	28.7	-0.7%	78.4	NM	1.7x
BDWELDING	15.1	+6.3%	9.2	NM	1.3x	CITYBANK	25,421	1.9%	2.8x	0.6x	MONNOFABR	22.2	+2.8%	75.1	NM	0.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	22,331	1.7%	19.2x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SHYAMPSUG	159.2	-8.4%	9.8	NM	NM	PRIMEBANK	21,036	1.6%	3.9x	0.7x	RENATA	395.6	395.6	2.0	100	39.56
NURANI	1.9	-5.0%	0.0	NM	0x	LHB	20,579	1.5%	14.0x	3.0x	FINEFOODS	383.0	350.1	10.0	61	22.78
NORTHERN	97.0	-3.2%	0.5	39.4x	0.7x	OLYMPIC	18,590	1.4%	13.4x	2.1x	LOVELLO	68.0	61.1	7.0	301	20.18
ALARABANK	15.0	-3.2%	0.5	39.4x	0.7x	ALARABANK	15,545	1.2%	39.4x	0.7x	SQURPHARMA	200.0	200.0	1.0	100	20.00
YPL	18.2	-3.2%	7.9	NM	3.4x	UTTARABANK	14,997	1.1%	NM	0.7x	GQBALLPEN	409.0	409.0	2.0	40	16.40
EBL1STMF	3.3	-2.9%	0.8	NM	0.4x	ROBI	14,666	1.1%	16.0x	2.2x	BRACBANK	64.0	63.9	2.0	250	15.99
JUTESPINN	197.7	-2.9%	0.5	NM	NM	BEACONPHAR	14,420	1.1%	21.4x	3.3x	RAHIMTEXT	225.0	202.5	26.0	72	14.98
ICBPMF1S1	3.5	-2.8%	2.0	NM	0.6x	UCB	13,924	1.0%	4.1x	0.4x	CITYGENINS	78.4	74.6	8.0	144	11.01
ZEALBANGLA	151.7	-2.7%	5.1	NM	NM	BSRMLTD	12,047	0.9%	3.6x	0.4x	DOMINAGE	31.7	27.9	3.0	236	7.07
MERCINS	23.7	-2.5%	1.3	12.6x	1.4x						PRAGATILIF	162.0	162.0	1.0	40	6.48

* 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
RENATA	395.6	395.6	39.6	100	2	INTRACO (Q1 Un-audited): Consolidated EPS was Tk. 0.21 for July-September 2025 as against Tk. 0.26 for July-September 2024; Consolidated NOCFPS was Tk. 0.13 for July-September 2025 as against Tk. 0.36 for July-September 2024. Consolidated NAV per share was Tk. 13.45 as on September 30, 2025 and Tk. 12.52 as on September 30, 2024.
LOVELLO	68.0	61.1	20.2	301	7	
LOVELLO	68.0	61.1	20.2	301	7	
SQURPHARMA	200.0	200.0	20.0	100	1	
GQBALLPEN	409.0	409.0	16.4	40	2	
BRACBANK	64.0	63.9	16.0	250	2	
RAHIMTEXT	225.0	202.5	15.0	72	26	
CITYGENINS	78.4	74.6	11.0	144	8	
DOMINAGE	31.7	27.9	7.1	236	3	
PRAGATILIF	162.0	162.0	6.5	40	1	
RELIANCE1	15.6	15.0	5.2	341	6	
ENVOYTEX	46.9	46.9	5.1	108	1	
WALTONHIL	369.5	369.5	5.0	14	2	
IDLC	35.6	35.1	3.3	94	2	
DBH1STMF	7.5	7.5	3.3	440	1	
BATBC	244.8	244.8	3.2	13	1	
AL-HAJTEX	139.0	138.0	3.0	21	2	
MALEKSPIN	27.3	27.3	2.7	98	1	
BDWELDING	15.2	15.1	2.3	150	3	
AFTABAUTO	36.5	36.5	2.0	55	1	
JAMUNABANK	18.9	18.9	1.7	88	1	
MJLBD	88.0	88.0	1.5	17	1	
Total			218.5		91	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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	07-Jan-26
MAKSONSPIN		0.0%	0.0%	Record Date	07-Jan-26

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