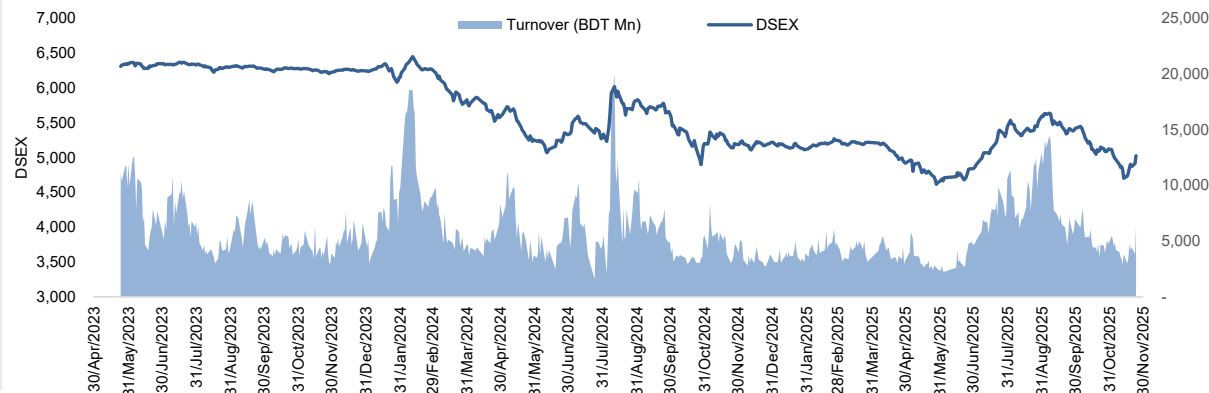


Daily Market Update

The market closed in green today. The benchmark index DSEX (+2.22%) gained 109.11 points and closed at 5,024.86. The blue-chip index DS30 (+2.28%), the Shariah-based index DSES (+2.43%), and the large-cap index CDSET (+1.54%) closed at 1,926.17, 1,052.63, and 1,034.25 points, respectively. All large-cap sectors posted positive performance today. NBFi booked the highest gain of 4.08% followed by Engineering (+2.29%), Food & Allied (+2.15%), Bank (+2.00%), Pharmaceutical (+1.76%), Fuel & Power (+1.71%), and Telecommunication (+1.00%), respectively. Block trades contributed 5.0% of the overall market turnover. Simtex Industries Limited (+9.9%) was the most traded share with a turnover of BDT 202 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,024.86	4,915.75	+109.11	+2.22%	-3.7%
DS30	1,926.17	1,883.25	+42.91	+2.28%	-0.7%
DSES	1,052.63	1,027.70	+24.93	+2.43%	-9.9%
CDSET	1,034.25	1,018.54	+15.71	+1.54%	-3.0%

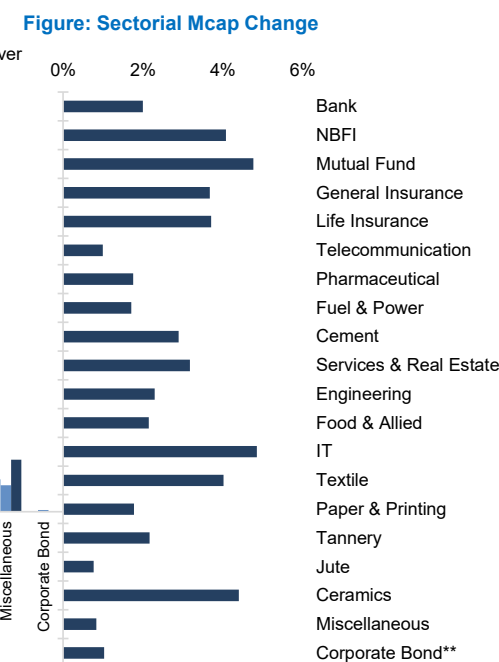
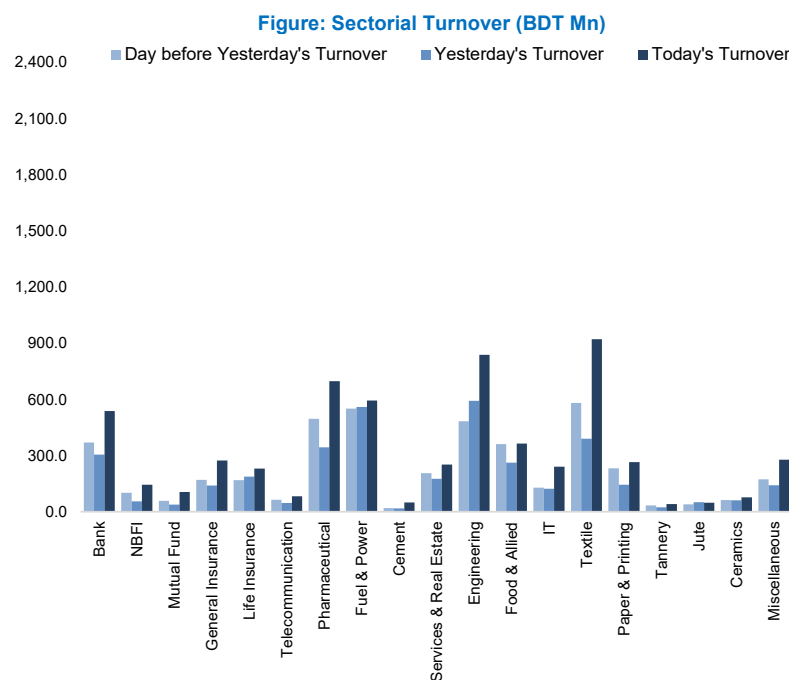
	Advanced	Declined	Unchanged	Total
All Category	359	22	10	391
A Category (Equity)	197	13	5	215
B Category (Equity)	75	4	0	79
N Category (Equity)	0	0	0	0
Z Category (Equity)	87	5	5	97
Mutual Funds	33	2	0	35
Corporate Bonds	2	0	1	3
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,933,599	6,843,913	+1.3%
	Mn USD	56,574	55,842	
Turnover	Mn BDT	6,360	3,859	+64.8%
	Mn USD	52	31	
Volume	Mn Shares	239	132	+81.5%
No. of Trade		209,374	145,733	+43.7%

* Average Interbank Exchange Rate is BDT 122.56 as of Nov 24, 2025

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Market PE 14.1x

Market PB 1.2x

* 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	1,414	1,386	+27.73	+2.00%	36	668,817	9.7%	537.6	8.9%	NM	1.0x	GP	371,603	11.0%	16.0	12.6x	7.5x
NBFI	944	907	+37.04	+4.08%	23	89,992	1.3%	144.7	2.4%	NM	NM	SQURPHARMA	180,215	5.4%	95.9	7.1x	1.2x
Mutual Fund	497	475	+22.63	+4.77%	37	23,837	0.3%	105.6	1.7%	NM	0.5x	ROBI	149,805	4.5%	53.3	16.3x	2.2x
General Insurance	2,791	2,693	+98.99	+3.68%	43	79,667	1.2%	273.2	4.5%	13.2x	1.2x	BATBC	138,618	4.1%	27.9	12.1x	2.4x
Life Insurance	1,721	1,659	+61.53	+3.71%	15	45,761	0.7%	230.4	3.8%	NM	NM	BRACBANK	131,401	3.9%	51.6	8.4x	1.3x
Telecommunication	4,658	4,612	+46.04	+1.00%	3	546,209	7.9%	82.6	1.4%	13.4x	4.1x	WALTONHIL	128,190	3.8%	9.6	11.3x	0.9x
Pharmaceutical	2,849	2,800	+49.26	+1.76%	34	540,178	7.9%	697.4	11.5%	11.6x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,072	1,054	+18.04	+1.71%	23	284,071	4.1%	593.6	9.8%	9.1x	0.6x	MARICO	86,304	2.6%	10.4	13.9x	28.9x
Cement	1,868	1,815	+52.52	+2.89%	7	89,006	1.3%	50.2	0.8%	21.5x	1.9x	UPGDCL	71,360	2.1%	4.6	6.7x	1.6x
Services & Real Estate	1,013	981	+31.22	+3.18%	9	55,695	0.8%	252.2	4.2%	17.7x	0.4x	BERGERPBL	69,765	2.1%	1.3	21.8x	4.0x
Engineering	2,366	2,313	+53.03	+2.29%	42	266,625	3.9%	838.2	13.9%	13.8x	0.8x	LHB	58,533	1.7%	34.7	14.4x	3.1x
Food & Allied	13,341	13,061	+280.40	+2.15%	21	244,537	3.6%	364.1	6.0%	19.5x	3.7x	BXPBARMA	49,028	1.5%	44.1	7.7x	1.0x
IT	1,735	1,655	+80.34	+4.86%	11	22,885	0.3%	240.0	4.0%	24.1x	1.4x	RENATA	45,454	1.4%	17.1	19.2x	1.3x
Textile	1,072	1,031	+41.47	+4.02%	58	111,693	1.6%	920.6	15.2%	74.2x	0.7x	UNILEVERCL	43,749	1.3%	0.4	60.5x	21.1x
Paper & Printing	4,623	4,542	+80.69	+1.78%	6	20,885	0.3%	264.7	4.4%	NM	1.2x	DUTCHBANGL	38,475	1.1%	5.8	7.8x	0.7x
Tannery	1,845	1,806	+39.12	+2.17%	6	21,360	0.3%	41.4	0.7%	NM	1.4x	PUBALIBANK	37,742	1.1%	9.7	6.1x	0.5x
Jute	12,000	11,909	+91.18	+0.77%	3	2,641	0.0%	47.5	0.8%	NM	NM	CITYBANK	37,118	1.1%	96.6	2.8x	0.6x
Ceramics	381	365	+16.08	+4.40%	5	17,108	0.2%	76.6	1.3%	NM	1.1x	EBL	36,225	1.1%	24.9	4.6x	0.8x
Miscellaneous	3,941	3,908	+32.53	+0.83%	15	214,170	3.1%	277.3	4.6%	NM	1.7x	ICB	34,864	1.0%	12.7	NM	1.1x
Corporate Bond**	16,873	16,701	+172.34	+1.03%	16	37,252	0.5%	0.2	0.0%	NM	NM	PRIMEBANK	32,613	1.0%	11.4	3.7x	0.7x
Treasury Bond**	2,297	2,300	-2.70	-0.12%	233	3,488,995	50.8%	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
IFIC	5.5	+10.0%	38.5	NM	0.6x	SQURPHARMA	104,510	7.3%	7.1x	1.2x	SIMTEX	31.0	+9.9%	202.2	30.7x	1.4x
PLFSL	1.1	+10.0%	0.7	NM	NM	BRACBANK	73,520	5.2%	8.4x	1.3x	ORIONINFU	376.9	+6.6%	170.8	NM	22.7x
RINGSHINE	3.3	+10.0%	17.9	NM	NM	BEXIMCO	69,465	4.9%	NM	1.3x	SAPORTL	47.0	-0.2%	142.0	17.8x	1.3x
SIMTEX	31.0	+9.9%	202.2	30.7x	1.4x	ISLAMIBANK	62,516	4.4%	NM	0.8x	ANWARGALV	96.1	-0.5%	135.0	NM	22.7x
KPPL	15.5	+9.9%	20.4	NM	NM	WALTONHIL	50,579	3.6%	11.3x	0.9x	RUNNERAUTO	44.2	-	126.7	22.1x	0.7x
EMERALDOIL	15.5	+9.93%	7.2	13.2x	NM	GP	38,875	2.7%	12.6x	7.5x	AFTABAUTO	39.0	+4.3%	125.2	NM	0.8x
QUEENSOUTH	11.1	+9.9%	6.4	61.7x	1x	BATBC	36,336	2.6%	12.1x	2.4x	MONOSPOOL	106.4	-5.1%	121.7	27.9x	2.3x
INTECH	27.9	+9.8%	6.2	NM	NM	BXPBARMA	34,505	2.4%	7.7x	1.0x	SPCL	53.0	-0.4%	121.5	14.8x	1.3x
NEWLINE	4.5	+9.8%	3.2	NM	0.2x	PUBALIBANK	25,230	1.8%	6.1x	0.5x	KBPPWBIL	66.5	+9.4%	112.1	NM	5.4x
PDL	4.5	+9.8%	1.4	NM	0.3x	CITYBANK	25,210	1.8%	2.8x	0.6x	LOVELLO	81.8	+4.1%	107.1	46.6x	6.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	19.2x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MONOSPOOL	106.4	-5.1%	121.7	27.9x	2.3x	LHB	21,812	1.5%	14.4x	3.1x	SIMTEX	30.8	26.8	21.0	4,775	132.52
BDWELDING	9.3	-3.1%	0.7	NM	1x	PRIMEBANK	20,145	1.4%	3.7x	0.7x	LOVELLO	84.0	71.0	12.0	351	26.91
WMSHIPYARD	8.6	-2.0%	2.5	NM	0.9x	OLYMPIC	19,861	1.4%	14.2x	2.2x	LOVELLO	84.0	71.0	12.0	351	26.91
PF1STMF	5.0	-2.0%	2.5	NM	0.9x	ALARABANK	15,936	1.1%	44.6x	0.8x	CITYGENINS	75.6	68.0	6.0	339	23.76
JUTESPINN	187.3	-1.8%	0.2	NM	NM	ROBI	15,347	1.1%	16.3x	2.2x	ACMELAB	78.7	78.7	3.0	215	16.90
RAHIMTEXT	181.6	-1.7%	10.2	77.3x	6.7x	UTTARABANK	14,718	1.0%	NM	0.7x	SUNLIFEINS	51.9	50.5	3.0	206	10.59
VAMLBDMF1	7.0	-1.4%	3.3	NM	0.6x	BEACONPHAR	14,601	1.0%	23.3x	3.6x	NATLIFEINS	78.9	78.9	3.0	83	6.53
AZIZPIPES	44.7	-1.3%	0.2	NM	NM	UCB	13,924	1.0%	4.0x	0.4x	ORIONINFU	346.5	340.0	2.0	12	4.11
BPPL	15.9	-1.2%	105.0	7.4x	0.6x	BSRMLTD	13,247	0.9%	3.7x	0.5x	SALVOCHEM	33.2	32.3	5.0	86	2.82
ALARABANK	17.0	-1.2%	1.5	44.6x	0.8x						MHSMML	14.0	14.0	1.0	200	2.80
						* 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
SIMTEX	30.8	26.8	132.5	4,775	21
LOVELLO	84.0	71.0	26.9	351	12
LOVELLO	84.0	71.0	26.9	351	12
CITYGENINS	75.6	68.0	23.8	339	6
ACMELAB	78.7	78.7	16.9	215	3
SUNLIFEINS	51.9	50.5	10.6	206	3
NATLIFEINS	78.9	78.9	6.5	83	3
ORIONINFU	346.5	340.0	4.1	12	2
SALVOCHEM	33.2	32.3	2.8	86	5
MHSML	14.0	14.0	2.8	200	1
RUNNERAUTO	43.8	41.3	2.6	61	2
MONNOCERA	78.0	78.0	2.2	29	1
ANWARGALV	88.1	88.1	2.1	24	2
DULAMACOT	125.0	124.7	1.8	15	3
BEACONPHAR	95.0	95.0	1.5	16	3
JAMUNABANK	20.7	20.7	1.4	70	1
RAHIMAFOOD	114.1	114.1	1.3	11	1
ASIATICLAB	59.4	59.3	1.0	17	2
APEXSPINN	164.0	164.0	0.9	5	1
BBSCABLES	14.0	14.0	0.8	55	1
CAPMBDBLMF	10.6	10.6	0.8	72	1
GHCL	22.4	22.4	0.7	30	1
Total			320.7		86

Important DSE News
BDTHAI

The Board of Directors has recommended no dividend for the year ended June 30, 2025. Date of AGM: 30.12.2025, Time: 11:30 AM, Venue: Hybrid System; RAOWA Convention Hall (Anchor), Level-3, VIP Road, Mohakhali, Dhaka 1206. Record Date: 14.12.2025. The Company has also reported EPS of Tk. (2.01), NAV per share of Tk. 28.60 and NOCFPS of Tk. (1.32) for the year ended June 30, 2025 as against Tk. (0.85), Tk. 30.56 and Tk. (0.96) respectively for the year ended June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DSSL		0.0%	0.5%	Record Date	25-Nov-25
RUNNERAUTO		0.0%	10.0%	Record Date	25-Nov-25
ICB		0.0%	0.0%	Record Date	25-Nov-25
CONFIDCEM		0.0%	10.0%	Record Date	25-Nov-25
JHRML		0.0%	5.0%	Record Date	26-Nov-25
MHSML		0.0%	3.0%	Record Date	26-Nov-25
FUWANGCER		0.0%	1.0%	Record Date	26-Nov-25
ATLASBANG		0.0%	0.0%	Record Date	26-Nov-25
NLTUBES		0.0%	1.0%	Record Date	26-Nov-25
SEAPEARL		0.0%	1.0%	Record Date	27-Nov-25
QUEENSOUTH		0.0%	0.5%	Record Date	27-Nov-25
SINOBANGLA		0.0%	10.0%	Record Date	27-Nov-25
SIMTEX		0.0%	10.0%	Record Date	27-Nov-25
JUTESPINN		0.0%	0.0%	Record Date	27-Nov-25
GBBPOWER		0.0%	0.0%	Record Date	27-Nov-25
CENTRALPHL		0.0%	0.0%	Record Date	27-Nov-25
PADMAOIL		0.0%	160.0%	Record Date	27-Nov-25

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