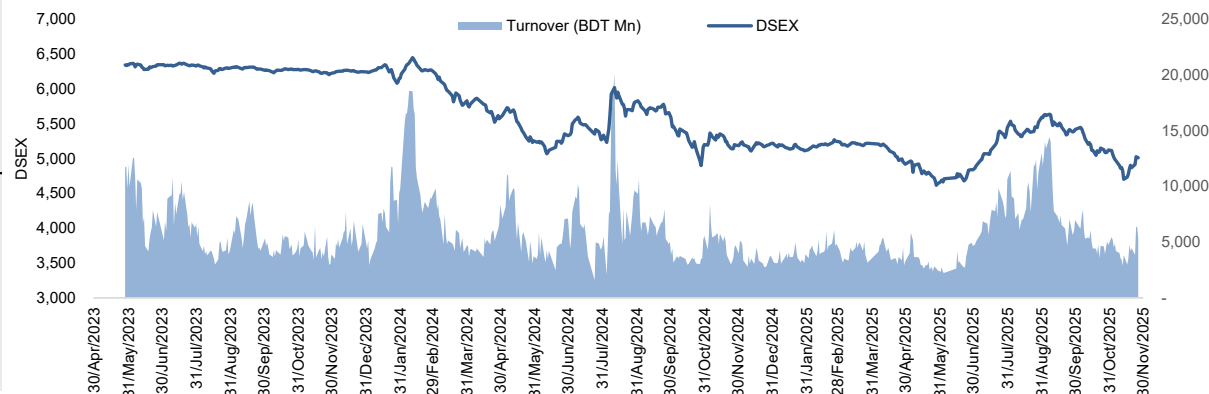


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.17%) lost 8.48 points and closed at 5,009.80. The blue-chip index DS30 (-0.33%), the Shariah-based index DSES (-0.46%), and the large-cap index CDSET (-0.18%) closed at 1,926.51, 1,050.61, and 1,034.40 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.74% followed by NBFI (-0.69%), Bank (-0.55%), Engineering (-0.53%), Pharmaceutical (-0.18%), Telecommunication (-0.13%), and Fuel & Power (+0.76%), respectively. Block trades contributed 2.2% of the overall market turnover. Shahjibazar Power Co. Ltd. (+0.9%) was the most traded share with a turnover of BDT 191 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,009.80	5,018.28	-8.48	-0.17%	-4.0%
DS30	1,926.51	1,932.83	-6.32	-0.33%	-0.7%
DSES	1,050.61	1,055.49	-4.88	-0.46%	-10.1%
CDSET	1,034.40	1,036.31	-1.91	-0.18%	-3.0%

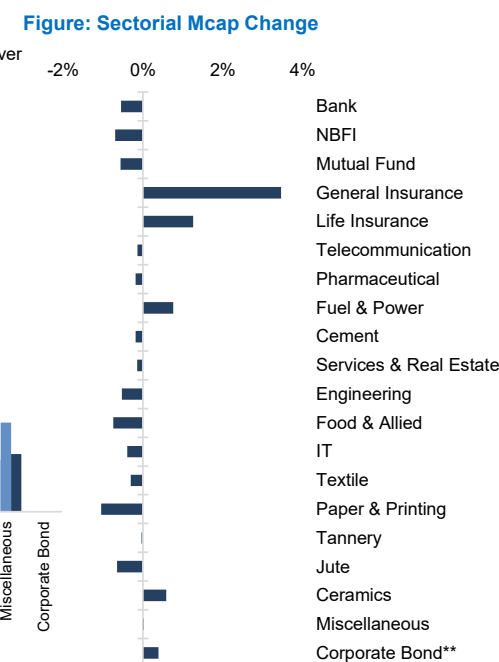
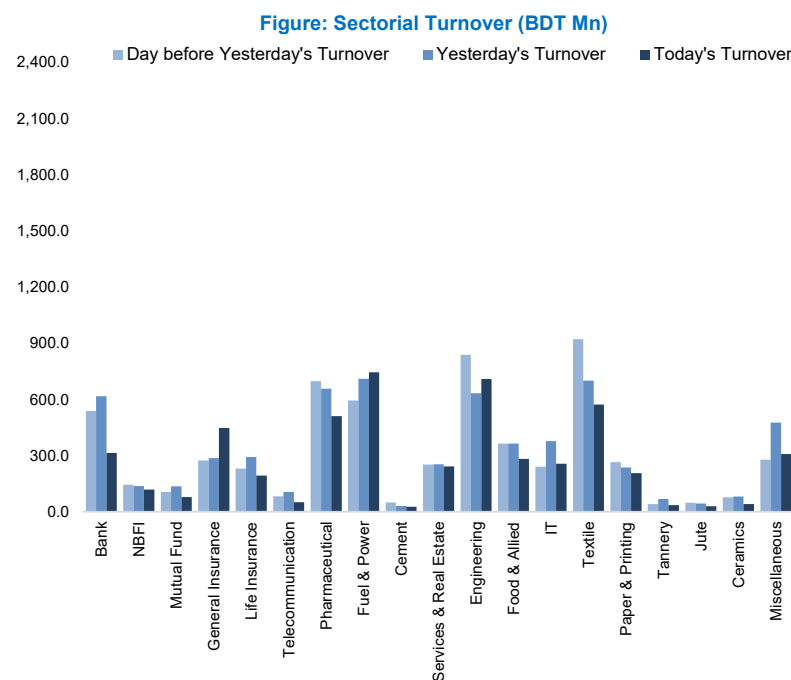
	Advanced	Declined	Unchanged	Total
All Category	157	174	54	385
A Category (Equity)	105	86	21	212
B Category (Equity)	23	42	12	77
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	46	21	96
Mutual Funds	8	16	11	35
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,927,569	6,930,516	-0.0%
	Mn USD	56,532	56,556	-0.0%
Turnover	Mn BDT	5,279	6,364	-17.1%
	Mn USD	43	52	-17.1%
Volume	Mn Shares	187	251	-25.8%
	No. of Trade	182,863	210,899	-13.3%

* Average Interbank Exchange Rate is BDT 122.54 as of Nov 26, 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	1,401	1,409	-7.74	-0.55%	36	663,022	9.7%	313.3	6.1%	NM	1.0x	GP	375,248	11.2%	6.0	12.8x	7.6x
NBFI	932	938	-6.50	-0.69%	23	88,777	1.3%	118.2	2.3%	NM	NM	SQURPHARMA	180,481	5.4%	42.7	7.1x	1.2x
Mutual Fund	510	513	-2.87	-0.56%	37	24,443	0.4%	78.4	1.5%	NM	0.5x	ROBI	149,281	4.4%	36.0	16.2x	2.2x
General Insurance	2,879	2,783	+96.27	+3.46%	43	82,164	1.2%	447.1	8.7%	13.6x	1.2x	BATBC	137,700	4.1%	16.9	12.0x	2.4x
Life Insurance	1,728	1,706	+21.45	+1.26%	15	45,953	0.7%	193.6	3.7%	NM	NM	BRACBANK	130,406	3.9%	25.3	8.3x	1.3x
Telecommunication	4,682	4,688	-6.24	-0.13%	3	549,032	8.0%	50.4	1.0%	13.5x	4.1x	WALTONHIL	126,624	3.8%	8.6	11.2x	0.9x
Pharmaceutical	2,856	2,861	-5.29	-0.18%	34	541,498	7.9%	510.3	9.9%	11.6x	1.4x	BEXIMCO	103,850	3.1%	0.2	NM	1.3x
Fuel & Power	1,079	1,071	+8.14	+0.76%	23	285,730	4.2%	744.9	14.4%	9.1x	0.6x	MARICO	86,672	2.6%	0.8	14.0x	29.1x
Cement	1,886	1,889	-3.44	-0.18%	7	89,865	1.3%	26.1	0.5%	21.7x	2.0x	UPGDCL	71,708	2.1%	6.2	6.7x	1.6x
Services & Real Estate	1,007	1,008	-1.46	-0.14%	9	55,368	0.8%	241.3	4.7%	17.6x	0.4x	BERGERPBL	69,765	2.1%	0.9	21.8x	4.0x
Engineering	2,342	2,354	-12.39	-0.53%	42	263,899	3.8%	709.0	13.7%	13.7x	0.7x	ISLAMIBANK	59,409	1.8%	3.4	NM	0.8x
Food & Allied	13,251	13,350	-99.22	-0.74%	21	242,873	3.5%	282.3	5.5%	19.4x	3.6x	BXPBARMA	49,429	1.5%	24.8	7.7x	1.0x
IT	1,771	1,778	-7.00	-0.39%	11	23,365	0.3%	256.0	5.0%	24.7x	1.4x	RENATA	47,106	1.4%	8.7	19.9x	1.3x
Textile	1,066	1,070	-3.27	-0.31%	58	111,048	1.6%	572.1	11.1%	73.8x	0.7x	UNILEVERCL	43,982	1.3%	0.1	60.9x	21.2x
Paper & Printing	4,557	4,605	-48.04	-1.04%	6	20,588	0.3%	206.6	4.0%	NM	1.1x	DUTCHBANGL	38,475	1.1%	8.6	7.8x	0.7x
Tannery	1,858	1,858	-0.58	-0.03%	6	21,508	0.3%	35.6	0.7%	NM	1.4x	PUBALIBANK	38,002	1.1%	5.2	6.1x	0.5x
Jute	11,745	11,821	-76.32	-0.65%	3	2,585	0.0%	28.8	0.6%	NM	NM	CITYBANK	37,118	1.1%	36.0	2.8x	0.6x
Ceramics	380	377	+2.20	+0.58%	5	17,035	0.2%	40.3	0.8%	NM	1.1x	EBL	36,385	1.1%	10.8	4.6x	0.8x
Miscellaneous	3,944	3,943	+1.10	+0.03%	15	214,349	3.1%	308.1	6.0%	NM	1.7x	ICB	34,083	1.0%	11.0	NM	1.1x
Corporate Bond**	16,907	16,842	+65.25	+0.39%	16	37,327	0.5%	0.1	0.0%	NM	NM	PRIMEBANK	32,729	1.0%	5.0	3.8x	0.7x
Treasury Bond**	2,292	2,292	-0.14	-0.01%	233	3,485,168	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
NURANI	2.2	+10.0%	0.1	NM	0.2x	SQURPHARMA	104,510	7.3%	7.1x	1.2x	SPCL	55.0	+0.9%	190.8	15.4x	1.4x
LRBDL	12.2	+9.9%	9.7	NM	0.3x	BRACBANK	73,520	5.2%	8.3x	1.3x	ORIONINFU	394.5	+2.0%	171.6	NM	23.8x
REGENTTEX	2.4	+9.1%	0.0	NM	0.1x	BEXIMCO	69,465	4.9%	NM	1.3x	SAPORTL	46.5	+0.2%	164.0	17.6x	1.3x
APOLISPAT	2.4	+9.1%	1.0	NM	0.1x	ISLAMIBANK	62,516	4.4%	NM	0.8x	BPPL	17.2	+4.2%	158.7	8.0x	0.6x
PRAGATIINS	71.6	+8.2%	92.8	13.0x	1.3x	WALTONHIL	50,579	3.6%	11.2x	0.9x	KBPWBIL	68.1	-3.7%	152.2	NM	5.6x
MONNOFABR	20.9	+7.73%	95.7	NM	0.8x	GP	38,875	2.7%	12.8x	7.6x	RUNNERAUTO	43.2	-2.3%	126.2	21.6x	0.6x
WMSHIPYARD	9.0	+7.1%	14.4	NM	1x	BATBC	36,336	2.6%	12.0x	2.4x	ANWARGALV	96.3	-3.1%	123.4	NM	22.7x
FASFIN	1.5	+7.1%	2.8	NM	NM	BXPBARMA	34,505	2.4%	7.7x	1.0x	DOMINAGE	23.5	+4.0%	115.3	NM	1.4x
AMANFEED	26.4	+6.5%	35.4	NM	0.9x	PUBALIBANK	25,230	1.8%	6.1x	0.5x	SIMTEX	33.1	-2.9%	107.3	32.8x	1.5x
CRYSTALINS	51.2	+6.0%	33.7	15.8x	1.9x	CITYBANK	25,210	1.8%	2.8x	0.6x	MONNOFABR	20.9	+7.7%	95.7	NM	0.8x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
HFL	5.9	-9.2%	0.4	NM	0.2x	LHB	21,812	1.5%	14.7x	3.2x	BRACBANK	65.9	65.9	1.0	500	32.95
RINGSHINE	3.2	-8.6%	8.0	NM	NM	PRIMEBANK	20,145	1.4%	3.8x	0.7x	FINEFOODS	300.0	282.0	4.0	42	12.14
NBL	3.3	-8.3%	0.2	NM	NM	OLYMPIC	19,861	1.4%	14.1x	2.2x	FINEFOODS	300.0	282.0	4.0	42	12.14
PREMIERLEA	1.1	-8.3%	0.2	NM	NM	ALARABANK	15,936	1.1%	43.6x	0.8x	SIMTEX	32.2	31.0	6.0	289	9.05
SHURWID	4.5	-8.2%	0.5	NM	0.4x	ROBI	15,347	1.1%	16.2x	2.2x	DOMINAGE	22.0	22.0	1.0	350	7.70
CNATEX	2.6	-7.1%	1.0	NM	NM	UTTARABANK	14,718	1.0%	NM	0.7x	ORIONINFU	370.6	370.0	2.0	14	5.18
FAMILYTEX	1.4	-6.7%	0.7	NM	0.1x	BEACONPHAR	14,601	1.0%	22.6x	3.5x	DUTCHBANGL	38.0	38.0	2.0	134	5.07
NEWLINE	4.2	-6.7%	1.0	NM	0.2x	UCB	13,924	1.0%	4.1x	0.4x	BSCPLC	144.0	144.0	2.0	28	4.09
EXIM1STMF	3.0	-6.3%	0.9	NM	0.3x	BSRMLTD	13,247	0.9%	3.7x	0.4x	IPDC	21.8	21.8	2.0	184	4.02
ISNLTD	86.8	-5.4%	34.2	NM	36.2x						AFTABAUTO	40.3	40.3	1.0	50	2.02

* 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
BRACBANK	65.9	65.9	33.0	500	1
FINEFOODS	300.0	282.0	12.1	42	4
FINEFOODS	300.0	282.0	12.1	42	4
SIMTEX	32.2	31.0	9.0	289	6
DOMINAGE	22.0	22.0	7.7	350	1
ORIONINFU	370.6	370.0	5.2	14	2
DUTCHBANGL	38.0	38.0	5.1	134	2
BSCPLC	144.0	144.0	4.1	28	2
IPDC	21.8	21.8	4.0	184	2
AFTABAUTO	40.3	40.3	2.0	50	1
NFML	13.3	13.3	2.0	150	1
UTTARABANK	20.0	20.0	1.7	87	1
RELIANCE1	14.4	13.8	1.3	89	2
SHYAMPSUG	167.9	167.9	1.2	7	1
CONFIDCEM	58.7	58.7	1.0	17	1
RUNNERAUTO	45.8	45.8	1.0	21	1
BDWELDING	9.3	9.3	0.9	100	1
CITYBANK	24.5	24.5	0.9	37	1
AIL	50.0	50.0	0.8	16	1
SUNLIFEINS	54.5	54.5	0.8	15	1
BEACHHATCH	51.0	51.0	0.8	15	1
TECHNODRUG	33.3	33.3	0.7	22	1
Total			116.4		47

Important DSE News

ECABLES

(Q1 Un-audited): EPS was Tk. (0.63) for July-September 2025 as against Tk. (1.44) for July-September 2024. NOCFPS was Tk. 4.15 for July-September 2025 as against Tk. (1.88) for July-September 2024. NAV per share was Tk. 338.69 as on September 30, 2025 and Tk. 339.32 as on June 30, 2025.

GOLDENSON

The Board of Directors has recommended No Dividend for the year ended June 30, 2025. Date of AGM: 31.12.2025, Time: 11:30 AM, Venue: Factory Premises through Hybrid System (Physical & Online platform). Record Date: 15.12.2025. The Company has reported consolidated EPS of Tk. (1.83), consolidated NAV per share of Tk. 16.06, and consolidated NOCFPS of Tk. 0.28 for the year ended June 30, 2025 as against Tk. (0.68), Tk. 17.99, and Tk. (0.32) for the year ended June 30, 2024.

EHL

The company has informed that as per the decision of the Board, Mr. Aminul Karim Siddique has been assigned the responsibility of Acting Managing Director of the company.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
WATACHEM		0.0%	10.0%	Record Date	27-Nov-25
SAPORTL		0.0%	18.0%	Record Date	27-Nov-25
ACFL		0.0%	10.0%	Record Date	1-Dec-25
AMANFEED		0.0%	11.5%	Record Date	1-Dec-25
SILVAPHL		0.0%	0.0%	Record Date	1-Dec-25
POWERGRID		0.0%	0.0%	Record Date	1-Dec-25
ORIONINFU		0.0%	20.0%	Record Date	1-Dec-25
ESQUIRENIT		0.0%	10.0%	Record Date	2-Dec-25
SONALILIFE		0.0%	15.0%	Record Date	2-Dec-25

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