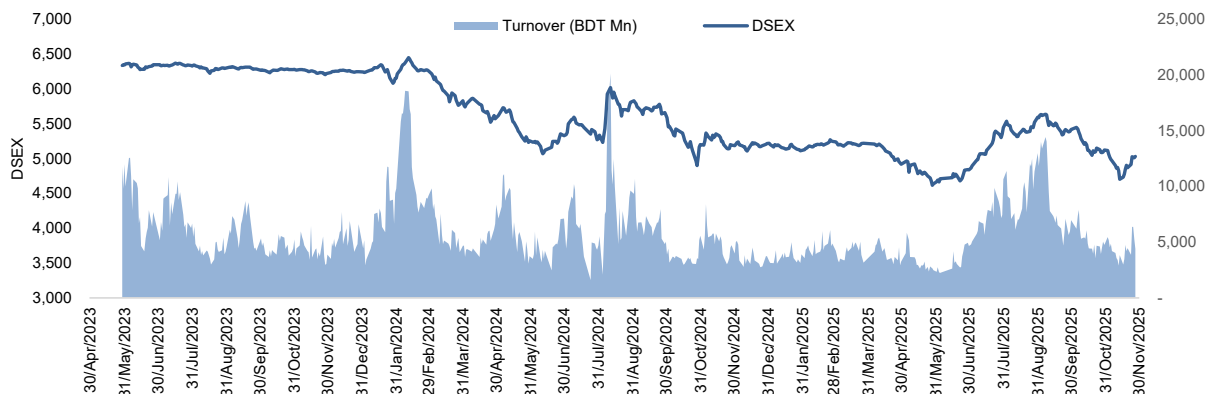


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.37%) gained 18.34 points and closed at 5,028.14. The blue-chip index DS30 (+0.39%), the Shariah-based index DSES (+0.59%), and the large-cap index CDSET (+0.38%) closed at 1,934.11, 1,056.84, and 1,038.36 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.55% followed by Engineering (+0.49%), Telecommunication (+0.33%), Bank (+0.15%), Fuel & Power (+0.11%), NBFI (+0.06%), and Food & Allied (-0.02%), respectively. Block trades contributed 2.8% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (+0.7%) was the most traded share with a turnover of BDT 233 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,028.14	5,009.80	+18.34	+0.37%	-3.6%
DS30	1,934.11	1,926.51	+7.60	+0.39%	-0.3%
DSES	1,056.84	1,050.61	+6.23	+0.59%	-9.6%
CDSET	1,038.36	1,034.40	+3.96	+0.38%	-2.6%

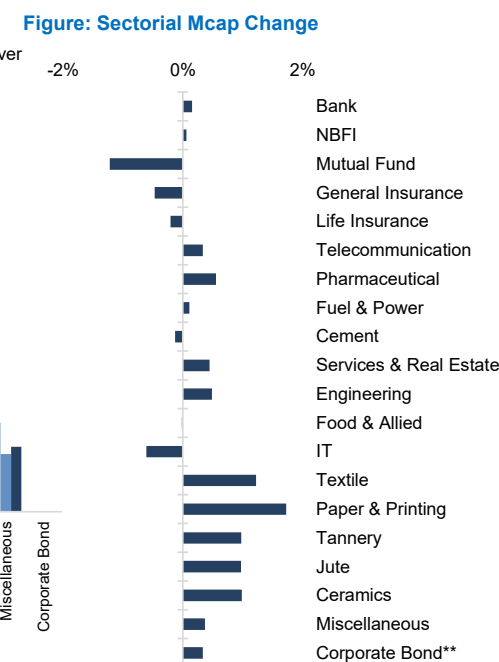
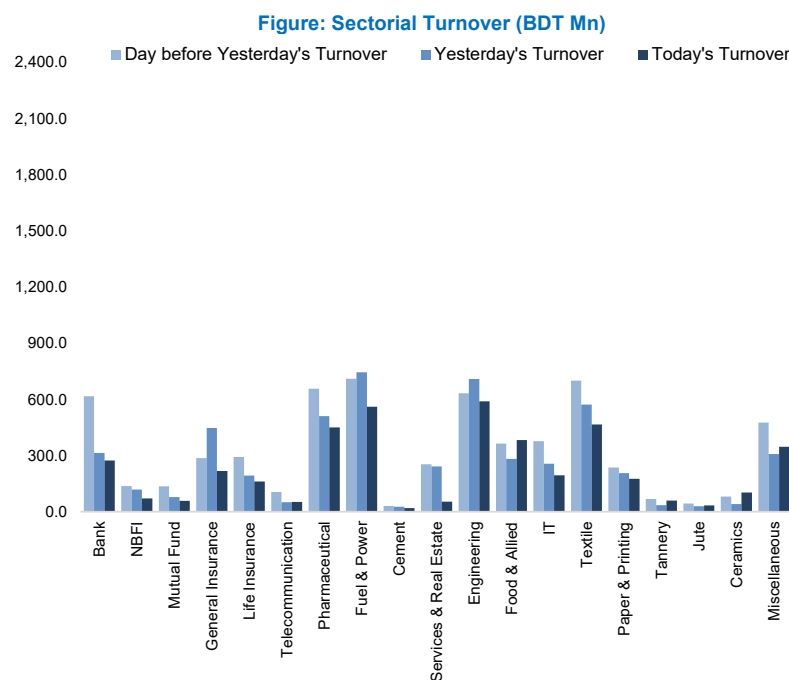
	Advanced	Declined	Unchanged	Total
All Category	170	136	73	379
A Category (Equity)	92	80	35	207
B Category (Equity)	38	23	16	77
N Category (Equity)	0	1	0	1
Z Category (Equity)	40	32	22	94
Mutual Funds	5	17	13	35
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,921,334	6,927,569	-0.1%
	Mn USD	56,481	56,532	
Turnover	Mn BDT	4,394	5,279	-16.8%
	Mn USD	36	43	
Volume	Mn Shares	149	187	-19.9%
No. of Trade		158,142	182,863	-13.5%

* Average Interbank Exchange Rate is BDT 122.54 as of Nov 27, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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Market PE 14.2x

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	1,403	1,401	+2.16	+0.15%	36	664,043	9.7%	273.6	6.4%	NM	1.0x	GP	375,924	11.1%	9.6	12.8x	7.6x
NBFI	932	932	+0.56	+0.06%	23	88,830	1.3%	71.7	1.7%	NM	NM	SQURPHARMA	181,634	5.4%	59.8	7.2x	1.2x
Mutual Fund	504	510	-6.22	-1.22%	37	24,145	0.4%	57.8	1.4%	NM	0.5x	ROBI	150,329	4.5%	32.0	16.3x	2.2x
General Insurance	2,865	2,879	-13.56	-0.47%	43	81,777	1.2%	217.3	5.1%	13.5x	1.2x	BATBC	137,160	4.1%	18.3	11.9x	2.4x
Life Insurance	1,724	1,728	-3.52	-0.20%	15	45,859	0.7%	162.0	3.8%	NM	NM	BRACBANK	131,003	3.9%	11.8	8.3x	1.3x
Telecommunication	4,698	4,682	+15.65	+0.33%	3	550,867	8.0%	52.6	1.2%	13.5x	4.1x	WALTONHIL	126,957	3.8%	2.5	11.2x	0.9x
Pharmaceutical	2,872	2,856	+15.78	+0.55%	34	544,490	7.9%	450.2	10.5%	11.7x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,080	1,079	+1.19	+0.11%	23	286,045	4.2%	560.5	13.1%	9.1x	0.6x	MARICO	86,694	2.6%	4.1	14.0x	29.1x
Cement	1,883	1,886	-2.41	-0.13%	7	89,750	1.3%	19.7	0.5%	21.6x	2.0x	UPGDCL	71,824	2.1%	3.9	6.7x	1.6x
Services & Real Estate	1,011	1,007	+4.48	+0.45%	9	55,614	0.8%	54.5	1.3%	17.7x	0.4x	BERGERPBL	70,060	2.1%	7.3	21.9x	4.0x
Engineering	2,353	2,342	+11.39	+0.49%	42	265,183	3.9%	589.7	13.8%	13.7x	0.7x	ISLAMIBANK	59,409	1.8%	1.6	NM	0.8x
Food & Allied	13,248	13,251	-2.17	-0.02%	21	242,833	3.5%	383.3	9.0%	19.4x	3.6x	BXPBARMA	50,455	1.5%	35.4	7.9x	1.0x
IT	1,761	1,771	-10.75	-0.61%	11	23,223	0.3%	194.0	4.5%	24.5x	1.4x	RENATA	46,980	1.4%	6.3	19.8x	1.3x
Textile	1,079	1,066	+13.05	+1.22%	58	112,408	1.6%	465.4	10.9%	74.7x	0.7x	UNILEVERCL	44,028	1.3%	0.0	60.9x	21.3x
Paper & Printing	4,636	4,557	+78.60	+1.72%	6	20,943	0.3%	175.2	4.1%	NM	1.2x	DUTCHBANGL	38,475	1.1%	1.5	7.8x	0.7x
Tannery	1,876	1,858	+18.16	+0.98%	6	21,718	0.3%	59.8	1.4%	NM	1.4x	PUBALIBANK	38,262	1.1%	2.9	6.2x	0.5x
Jute	11,860	11,745	+114.45	+0.97%	3	2,611	0.0%	33.4	0.8%	NM	NM	CITYBANK	36,966	1.1%	34.9	2.8x	0.6x
Ceramics	383	380	+3.74	+0.98%	5	17,202	0.3%	103.0	2.4%	NM	1.1x	EBL	36,225	1.1%	33.2	4.6x	0.8x
Miscellaneous	3,959	3,944	+14.68	+0.37%	15	215,147	3.1%	346.6	8.1%	NM	1.7x	ICB	34,257	1.0%	1.7	NM	1.1x
Corporate Bond**	16,964	16,907	+56.84	+0.34%	16	37,452	0.5%	0.1	0.0%	NM	NM	PRIMEBANK	33,309	1.0%	40.2	3.8x	0.7x
Treasury Bond**	2,280	2,292	-11.57	-0.50%	233	3,469,205	50.6%	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
RAHIMAFOOD	135.0	+9.9%	91.6	NM	14.2x	SQURPHARMA	104,510	7.3%	7.2x	1.2x	KBPPWBIL	68.6	+0.7%	233.4	NM	5.6x
FORTUNE	15.6	+9.9%	24.4	NM	1.1x	BRACBANK	73,520	5.2%	8.3x	1.3x	SPCL	54.0	-1.8%	198.6	15.1x	1.3x
RINGSHINE	3.5	+9.4%	14.5	NM	NM	BEXIMCO	69,465	4.9%	NM	1.3x	BEACHHATCH	53.4	+4.5%	116.2	11.4x	3.2x
ISLAMICFIN	8.2	+9.3%	7.0	NM	NM	ISLAMIBANK	62,516	4.4%	NM	0.8x	BPPL	16.7	-2.9%	112.0	7.7x	0.6x
GQBALLPEN	443.9	+8.7%	22.6	NM	3.2x	WALTONHIL	50,579	3.6%	11.2x	0.9x	ANWARGALV	96.7	+0.4%	104.9	NM	22.8x
REGENTTEX	2.6	+8.33%	0.1	NM	0.1x	GP	38,875	2.7%	12.8x	7.6x	ORIONINFU	394.1	-0.1%	104.8	NM	23.8x
DSHGARME	107.2	+8.3%	25.6	NM	1x	BATBC	36,336	2.6%	11.9x	2.4x	DOMINAGE	24.2	+3.0%	94.6	NM	1.4x
KAY&QUE	393.1	+6.8%	65.0	35.4x	3.8x	BXPBARMA	34,505	2.4%	7.9x	1.0x	RAHIMAFOOD	135.0	+9.9%	91.6	NM	14.2x
SHURWID	4.8	+6.7%	0.1	NM	0.4x	PUBALIBANK	25,230	1.8%	6.2x	0.5x	MONNOCERA	81.6	+4.7%	85.1	NM	1.0x
PENINSULA	18.2	+6.4%	29.2	50.6x	0.7x	CITYBANK	25,210	1.8%	2.8x	0.6x	LOVELLO	74.9	-2.9%	69.3	42.7x	6.0x
RENATA						25,107	1.8%	19.8x	1.3x							
LHB						21,812	1.5%	14.7x	3.1x							
PRIMEBANK						20,145	1.4%	3.8x	0.7x							
OLYMPIC						19,861	1.4%	14.1x	2.2x							
ALARABANK						15,936	1.1%	44.4x	0.8x							
ROBI						15,347	1.1%	16.3x	2.2x							
UTTARABANK						14,718	1.0%	NM	0.7x							
BEACONPHAR						14,601	1.0%	22.9x	3.5x							
UCB						13,924	1.0%	4.1x	0.4x							
BSRMLTD						13,247	0.9%	3.7x	0.5x							
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* 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	322.0	282.0	44.7	151	19
KBPPWBIL	74.5	61.5	25.3	386	2
KBPPWBIL	74.5	61.5	25.3	386	2
ORIONINFU	380.3	380.0	10.3	27	2
BDCOM	29.2	29.2	2.6	90	1
SUNLIFEINS	53.2	53.2	2.5	47	1
MEGHNALIFE	54.6	54.6	1.9	35	1
GQBALLPEN	375.0	375.0	1.9	5	1
ITC	43.0	43.0	1.6	38	1
BPPL	17.2	17.2	1.5	89	1
BSC	115.0	115.0	1.0	9	1
NCCBANK	12.3	12.3	0.8	66	1
BXPHARMA	105.0	105.0	0.7	7	1
RELIANCE1	14.3	14.3	0.7	50	1
ANWARGALV	105.8	105.8	0.5	5	1
BENGALWTL	18.8	18.8	0.5	27	1
EXIM1STMF	3.3	3.3	0.5	152	1
MHSMML	14.3	14.3	0.5	35	1

Total	124.2	41
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Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SPCL		0.0%	20.0%	Record Date	3-Dec-25
EGEN		0.0%	2.3%	Record Date	3-Dec-25
TAMIJTEX		10.0%	12.0%	Record Date	3-Dec-25
METROSPIN		0.0%	0.0%	Record Date	3-Dec-25
ANWARGALV		0.0%	0.0%	Record Date	4-Dec-25
COPPERTECH		0.0%	2.2%	Record Date	4-Dec-25
ORIONPHARM		0.0%	0.0%	Record Date	4-Dec-25
RDFOOD		0.0%	1.0%	Record Date	7-Dec-25
PHARMAID		0.0%	30.0%	Record Date	7-Dec-25
JAMUNAOIL		0.0%	180.0%	Record Date	7-Dec-25

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Important DSE News
SAMATALETH

The Board of Directors has recommended No Dividend for the year ended June 30, 2025. Date of AGM: 31.12.2025, Time: 11:00 AM, Venue: Hybrid System (in combination of both physical presence and digital platform) at Factory Premises of the Company, 120, Sher-E-Bangla Road, Hazaribagh, Dhaka-1209. Record Date: 18.12.2025. The Company has also reported EPS of Tk. (0.02), NAV per share of Tk. 14.35 and NOCFPS of Tk. (0.07) for the year ended June 30, 2025 as against Tk. 0.05, Tk. 14.37 and Tk. (0.05) respectively for the year ended June 30, 2024.

SALVOCHEM

Mr. Md. Salam Obaidul Karim, Managing Director of the company, has completed his buying of 4,40,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated on 13.11.2025.