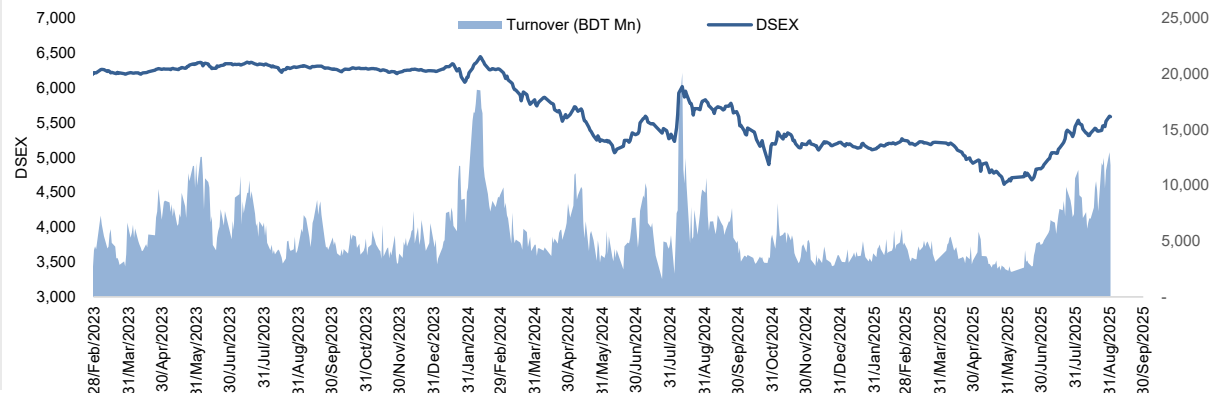


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.19%) lost 10.61 points and closed at 5,583.79. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.22%), and the large-cap index CDSET (-0.02%) closed at 2,188.76, 1,225.03, and 1,142.67 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 1.59% followed by NBF1 (-0.87%), Telecommunication (-0.85%), Food & Allied (-0.43%), Pharmaceutical (-0.30%), Bank (-0.11%), and Engineering (+1.34%), respectively. Block trades contributed 3.1% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-4.0%) was the most traded share with a turnover of BDT 289 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,583.79	5,594.39	-10.61	-0.19%	+7.0%
DS30	2,188.76	2,193.72	-4.96	-0.23%	+12.8%
DSES	1,225.03	1,227.71	-2.68	-0.22%	+4.8%
CDSET	1,142.67	1,142.88	-0.21	-0.02%	+7.2%

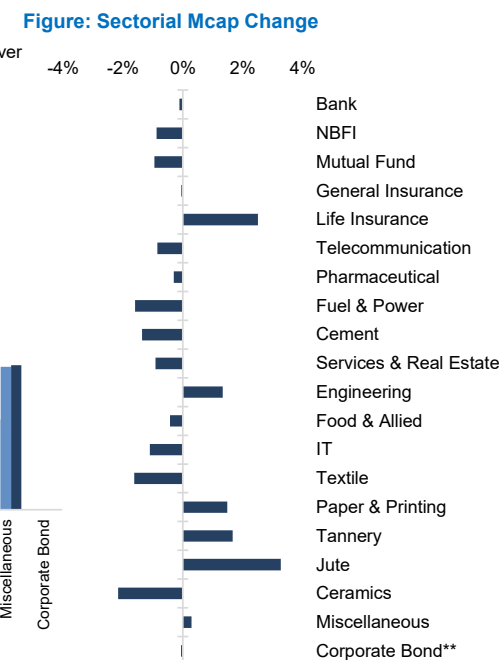
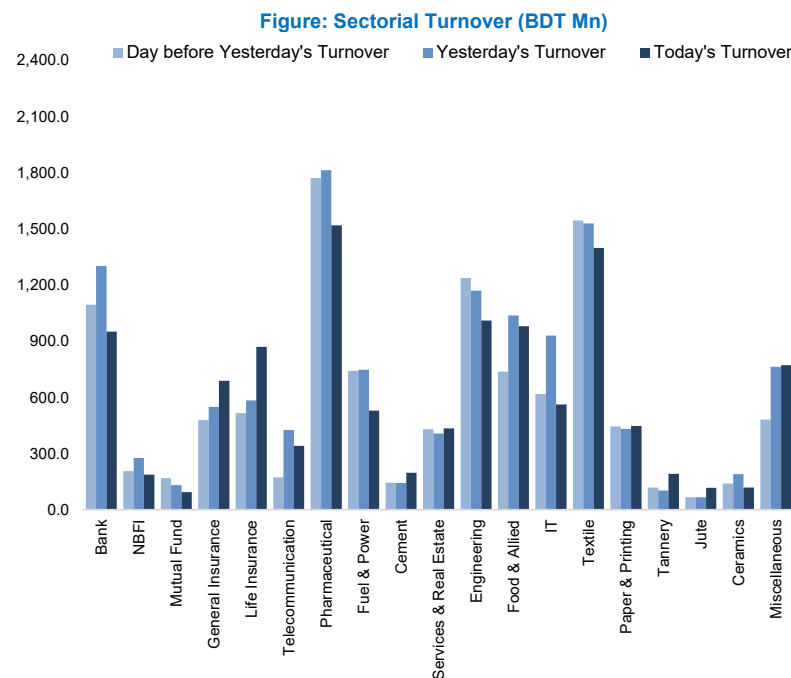
	Advanced	Declined	Unchanged	Total
All Category	119	244	35	398
A Category (Equity)	69	128	23	220
B Category (Equity)	22	60	1	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	28	56	11	95
Mutual Funds	1	17	18	36
Corporate Bonds	1	1	0	2
Treasury Bonds	1	1	0	2

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,273,509	7,280,488	-0.1%
	Mn USD	59,771	59,829	
Turnover	Mn BDT	11,811	12,964	-8.9%
	Mn USD	97	107	
Volume	Mn Shares	326	404	-19.4%
No. of Trade		315,801	325,932	-3.1%

\* Average Interbank Exchange Rate is BDT 121.69 as of Sep 01, 2025

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Market PE 16.7x

Market PB 1.3x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, ABBANK, IFIC, FIRSTSBANK, GIB and NBL

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	1,550	1,552	-1.76	-0.11%	36	733,285	10.1%	951.3	8.3%	NM	0.8x	GP	414,542	11.1%	79.2	14.1x	7.3x
NBFI	1,085	1,094	-9.56	-0.87%	23	103,368	1.4%	187.8	1.6%	NM	NM	SQURPHARMA	199,451	5.3%	102.7	8.5x	1.5x
Mutual Fund	560	566	-5.36	-0.95%	37	26,856	0.4%	93.5	0.8%	NM	0.5x	BATBC	159,030	4.2%	70.8	12.8x	3.0x
General Insurance	2,958	2,959	-1.52	-0.05%	43	84,411	1.2%	688.4	6.0%	14.2x	1.3x	BRACBANK	155,491	4.1%	148.7	11.0x	1.8x
Life Insurance	2,175	2,122	+53.18	+2.51%	15	57,849	0.8%	868.7	7.6%	NM	NM	WALTONHIL	153,827	4.1%	84.6	11.9x	1.3x
Telecommunication	5,053	5,097	-43.46	-0.85%	3	592,552	8.1%	341.5	3.0%	15.0x	4.3x	ROBI	149,805	4.0%	166.1	17.2x	2.3x
Pharmaceutical	3,232	3,242	-9.85	-0.30%	34	612,709	8.4%	1,518.4	13.3%	14.1x	1.7x	BEXIMCO	103,850	2.8%	0.5	NM	1.3x
Fuel & Power	1,191	1,210	-19.30	-1.59%	23	315,542	4.3%	528.7	4.6%	19.9x	0.7x	MARICO	92,015	2.5%	4.3	15.0x	27.6x
Cement	2,125	2,154	-29.35	-1.36%	7	101,248	1.4%	198.0	1.7%	23.3x	2.2x	UPGDCL	84,346	2.2%	19.6	7.2x	2.0x
Services & Real Estate	1,096	1,107	-10.05	-0.91%	9	60,303	0.8%	434.3	3.8%	27.7x	0.5x	BERGERPBL	72,638	1.9%	9.6	20.7x	4.2x
Engineering	2,721	2,685	+35.93	+1.34%	42	306,997	4.2%	1,010.6	8.8%	14.5x	0.9x	LHB	66,082	1.8%	38.0	17.6x	3.5x
Food & Allied	15,351	15,417	-65.80	-0.43%	21	280,881	3.9%	980.0	8.6%	21.3x	4.4x	RENATA	58,484	1.6%	92.1	20.8x	1.7x
IT	2,092	2,115	-23.22	-1.10%	11	27,590	0.4%	562.3	4.9%	23.2x	1.7x	BXPHARMA	57,281	1.5%	78.1	8.9x	1.2x
Textile	1,222	1,242	-20.19	-1.62%	58	127,293	1.7%	1,397.7	12.2%	NM	0.9x	UNILEVERCL	48,619	1.3%	0.1	76.5x	26.7x
Paper & Printing	5,804	5,719	+84.96	+1.49%	6	26,221	0.4%	446.7	3.9%	NM	1.2x	ICB	44,924	1.2%	15.1	NM	1.1x
Tannery	2,171	2,135	+35.58	+1.67%	6	24,185	0.3%	192.2	1.7%	NM	1.8x	DUTCHBANGL	42,051	1.1%	29.3	11.2x	0.8x
Jute	14,713	14,247	+465.92	+3.27%	3	3,239	0.0%	116.3	1.0%	NM	NM	EBL	40,534	1.1%	35.5	5.8x	0.9x
Ceramics	424	433	-9.35	-2.16%	5	19,008	0.3%	118.2	1.0%	NM	1.2x	PUBALIBANK	38,783	1.0%	35.1	5.3x	0.7x
Miscellaneous	4,154	4,142	+12.17	+0.29%	15	225,576	3.1%	771.6	6.7%	89.4x	1.8x	CITYBANK	38,639	1.0%	191.1	3.6x	0.7x
Corporate Bond**	16,151	16,161	-9.74	-0.06%	16	35,658	0.5%	0.3	0.0%	NM	NM	OLYMPIC	33,890	0.9%	61.2	18.3x	2.8x
Treasury Bond**	2,269	2,262	+6.35	+0.28%	235	3,515,577	48.3%	40.4	0.4%	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
INTECH	34.1	+10.0%	60.5	NM	NM	SQURPHARMA	108,958	7.7%	8.5x	1.5x	LOVELLO	99.2	-4.0%	288.8	44.7x	7.9x
DSHGARME	140.0	+10.0%	82.4	NM	7.6x	ISLAMIBANK	74,730	5.3%	NM	1.0x	KBPPWBIL	126.4	+5.2%	252.9	NM	10.6x
BANGAS	141.3	+10.0%	113.1	NM	6.7x	BEXIMCO	69,463	4.9%	NM	1.3x	ORIONINFU	561.2	+4.9%	233.3	NM	35.7x
BAYLEASING	4.8	+9.1%	3.4	NM	NM	BATBC	50,233	3.6%	12.8x	3.0x	SINOBANGLA	61.4	+5.7%	222.4	48.2x	2.4x
STANCERAM	90.1	+8.9%	1.7	NM	NM	WALTONHIL	46,773	3.3%	11.9x	1.3x	CITYBANK	25.4	-	191.1	3.6x	0.7x
SHYAMPSUG	179.8	+8.51%	16.5	NM	NM	BRACBANK	46,489	3.3%	11.0x	1.8x	SONALIPAPR	281.3	-0.2%	176.4	27.3x	1.7x
PENINSULA	12.9	+8.4%	18.7	NM	0x	GP	44,708	3.2%	14.1x	7.3x	BSC	117.9	-1.1%	167.6	6.0x	1.2x
POPULARLIF	54.7	+7.7%	159.9	NM	NM	RENATA	32,968	2.3%	20.8x	1.7x	ROBI	28.6	-0.7%	166.1	17.2x	2.3x
CLICL	60.2	+7.5%	93.7	NM	NM	BXPHARMA	23,409	1.7%	8.9x	1.2x	AIL	60.7	+3.4%	161.6	22.4x	2.5x
FIRSTFIN	2.9	+7.4%	0.7	NM	NM	PUBALIBANK	22,905	1.6%	5.3x	0.7x	POPULARLIF	54.7	+7.7%	159.9	NM	NM
						CITYBANK	21,020	1.5%	3.6x	0.7x						
						LHB	20,953	1.5%	17.6x	3.5x						
						OLYMPIC	20,496	1.5%	18.3x	2.8x						
						ALARABANK	18,282	1.3%	37.1x	0.8x						
						BEACONPHAR	17,838	1.3%	36.7x	4.9x						
						PRIMEBANK	16,142	1.1%	4.0x	0.8x						
						ROBI	14,876	1.1%	17.2x	2.3x						
						UTTARABANK	13,699	1.0%	NM	0.8x						
						NBL	13,055	0.9%	NM	NM						
						BSRMLTD	12,852	0.9%	5.2x	0.6x						
						* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
						** 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											
PRIMEFIN	2.7	-6.9%	4.2	NM	0.4x											
EPGL	21.4	-6.1%	68.0	NM	1x											
PHPMF1	3.1	-6.1%	1.6	NM	0.3x											
HAMI	102.0	-5.9%	13.7	NM	11.2x											
REGENTTEX	3.3	-5.7%	0.2	NM	0.1x											
SHARPIND	18.2	-5.7%	16.4	28.4x	1.7x											
GSPFINANCE	3.4	-5.6%	1.0	NM	0.3x											
FAREASTFIN	1.8	-5.3%	2.1	NM	NM											
SHEPHERD	18.4	-5.2%	46.7	NM	1.3x											
TALLUSPIN	5.9	-4.8%	0.8	NM	0.4x											
						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
						ORIONINFU	534.1	494.9	33.0	418	214.12					
						CLICL	54.9	51.5	9.0	760	40.11					
						PTL	58.5	55.0	5.0	435	24.68					
						LOVELLO	106.5	93.5	8.0	168	16.08					
						UTTARABANK	21.2	21.2	1.0	617	13.08					
						FINEFOODS	287.1	263.0	2.0	26	7.32					
						ISNLTD	105.0	98.0	2.0	57	5.69					
						CITYBANK	23.0	23.0	2.0	200	4.60					
						CITYGENINS	63.0	62.0	2.0	62	3.86					
						SIMTEX	20.2	20.2	2.0	171	3.45					

\* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

\*\* 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
ORIONINFU	534.1	494.9	214.1	418	33
CLICL	54.9	51.5	40.1	760	9
PTL	58.5	55.0	24.7	435	5
LOVELLO	106.5	93.5	16.1	168	8
UTTARABANK	21.2	21.2	13.1	617	1
FINEFOODS	287.1	263.0	7.3	26	2
ISNLTD	105.0	98.0	5.7	57	2
CITYBANK	23.0	23.0	4.6	200	2
CITYGENINS	63.0	62.0	3.9	62	2
SIMTEX	20.2	20.2	3.4	171	2
NATLIFEINS	116.1	116.1	3.2	28	1
AAMRANET	23.1	23.1	2.8	122	1
MEGHNACEM	53.5	53.5	1.9	35	1
EASTRNLUB	2,630.0	2,630.0	1.8	1	1
EXIM1STMF	4.8	4.4	1.7	381	2
BEACONPHAR	151.8	135.0	1.6	11	2
SHEPHERD	19.0	19.0	1.5	80	1
STANDARINS	47.0	47.0	1.5	32	1
OLYMPIC	175.0	175.0	1.4	8	1
ASIATICLAB	57.0	56.7	1.4	24	2
MALEKSPIN	32.5	32.5	1.1	33	1
INTRACO	25.9	25.9	0.9	35	1
<b>Total</b>			<b>364.2</b>		<b>97</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GRAMEENS2		0.0%	7.5%	Record Date	3-Sep-25
RELIANCE1		0.0%	0.0%	Record Date	4-Sep-25
SEMLLECMF		0.0%	0.0%	Record Date	4-Sep-25
SEMLFBSLGF		0.0%	0.0%	Record Date	4-Sep-25
PREMIERLEA		0.0%	0.0%	Record Date	4-Sep-25
TILIL		0.0%	5.0%	Record Date	4-Sep-25
SALVOCHEM		2.5%	0.0%	Record Date	8-Sep-25
CAPMIBBLMF		0.0%	0.0%	Record Date	10-Sep-25
CAPMBDBLMF		0.0%	0.0%	Record Date	10-Sep-25
PREMIERBAN		0.0%	0.0%	Record Date	17-Sep-25
ISLAMIBANK		0.0%	0.0%	Record Date	23-Sep-25
RUPALILIFE		0.0%	10.0%	Record Date	3-Nov-25

**Important DSE News**
**ISLAMIBANK**

**(Q1 Financials):** Consolidated EPS was Tk. 0.18 for January-March 2025 as against Tk. 0.31 for January-March 2024. Consolidated NOCFPS was Tk. (16.16) for January-March 2025 as against Tk. (28.17) for January-March 2024. Consolidated NAV per share was Tk. 44.31 as on March 31, 2025 and Tk. 45.40 as on March 31, 2024.

**(Q2 Financials):** Consolidated EPS was Tk. 0.24 for April-June 2025 as against Tk. 1.91 for April-June 2024; Consolidated EPS was Tk. 0.42 for January-June 2025 as against Tk. 2.22 for January-June 2024. Consolidated NOCFPS was Tk. 17.68 for January-June 2025 as against Tk. 54.79 for January-June 2024. Consolidated NAV per share was Tk. 44.39 as on June 30, 2025 and Tk. 46.06 as on June 30, 2024.

**RUPALILIFE**

**(Q1 Financials):** As per life revenue account of the company for January to March, 2025, excess of total claims and expenses over total income (deficit) was BDT 150.55 million as against excess of total claims and expenses over total income (deficit) of BDT 274.06 million in the corresponding previous period of 2024. Balance of Life Insurance Fund was BDT 4,797.41 million as on March 31, 2025 as against BDT 4,736.49 million as on March 31, 2024 resulting a net increase of BDT 60.91 million.

**(Q2 Financials):** As per life revenue account of the company for April to June, 2025, excess of total income over total claims and expenses (surplus) was BDT 1.48 million as against excess of total income over total claims and expenses (surplus) of BDT 28.41 million in the corresponding previous period of 2024. Whereas as per life revenue account of the company for January to June, 2025, excess of total claims and expenses over total income was BDT 149.07 million as against excess of total claims and expenses over total income (deficit) of BDT 245.64 million in the corresponding previous period of 2024. Balance of Life Insurance Fund was BDT 4,798.13 million as on June 30, 2025 as against BDT 4,764.19 million as on June 30, 2024 resulting a net increase of BDT 33.94 million.

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 03.11.2025, Time: 10:00 AM, Venue: Through Digital Platform (Link will be notified later on). Record Date: 29.09.2025.

**CITYBANK**

Mr. Hossain Khaled, a Director of the Company, has expressed his intention to buy 2,25,000 shares of the company at prevailing market price in the Public Market within next 30 (thirty) working days.

**NHFIL**

The Board of Directors of the company recommended 10.00% Cash Dividend for the year ended December 31, 2024, subject to NOC from Bangladesh Bank. However, Bangladesh Bank has allowed @ 10% Stock Dividend instead of "10% Cash Dividend" for the year ended December 31, 2024. Therefore, the revised recommendation of the Dividend will be "10% Stock Dividend" instead of 10% cash Dividend. The reason for stock dividend is to continue the Tier-1 capital and to reinvest in the business operation.

**MEGHNALIFE**

The company has informed that it is going to close receiving the Margin List by September 07, 2025. Shareholders who have not yet submitted the Margin List are requested to send it within the mentioned deadline. Furthermore, institutions which have sent the Margin List only by email are requested to confirm the same over phone at the following number: 01325069766.

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