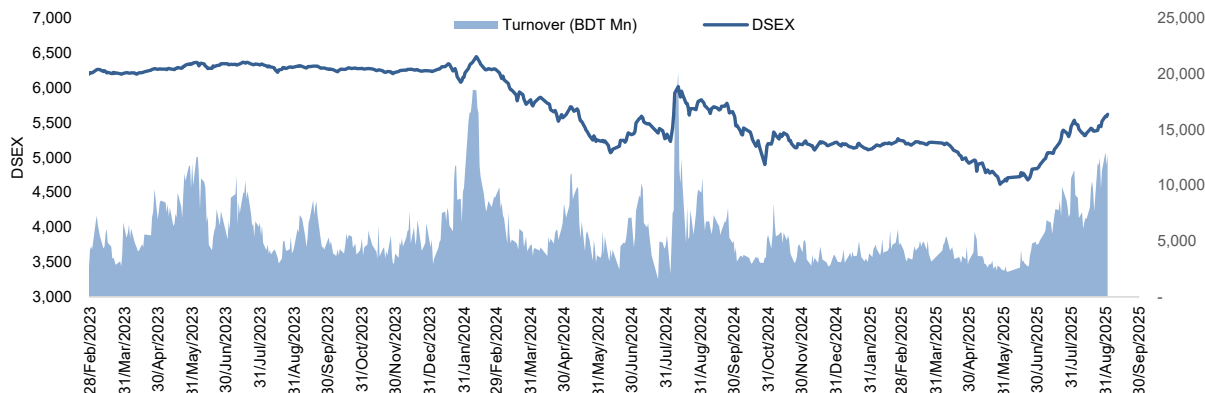


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.67%) gained 37.13 points and closed at 5,620.92. The blue-chip index DS30 (+0.29%), the Shariah-based index DSES (+0.66%), and the large-cap index CDSET (+0.06%) closed at 2,195.11, 1,233.14, and 1,143.41 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 1.27% followed by Fuel & Power (+1.11%), NBFI (+1.00%), Bank (+0.48%), Engineering (+0.06%), Pharmaceutical (+0.03%), and Food & Allied (-0.37%), respectively. Block trades contributed 1.5% of the overall market turnover. The City Bank Ltd. (+3.5%) was the most traded share with a turnover of BDT 457 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,620.92	5,583.79	+37.13	+0.67%	+7.8%
DS30	2,195.11	2,188.76	+6.35	+0.29%	+13.2%
DSES	1,233.14	1,225.03	+8.10	+0.66%	+5.5%
CDSET	1,143.41	1,142.67	+0.74	+0.06%	+7.3%

	Advanced	Declined	Unchanged	Total
All Category	220	131	47	398
A Category (Equity)	107	85	28	220
B Category (Equity)	69	9	5	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	44	37	14	95
Mutual Funds	6	14	16	36
Corporate Bonds	0	2	0	2
Treasury Bonds	1	1	0	2

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,285,560	7,273,509	+0.2%
	Mn USD	59,878	59,779	
Turnover	Mn BDT	12,781	11,811	+8.2%
	Mn USD	105	97	
Volume	Mn Shares	383	326	+17.6%
No. of Trade		317,634	315,801	+0.6%

\* Average Interbank Exchange Rate is BDT 121.67 as of Sep 02, 2025

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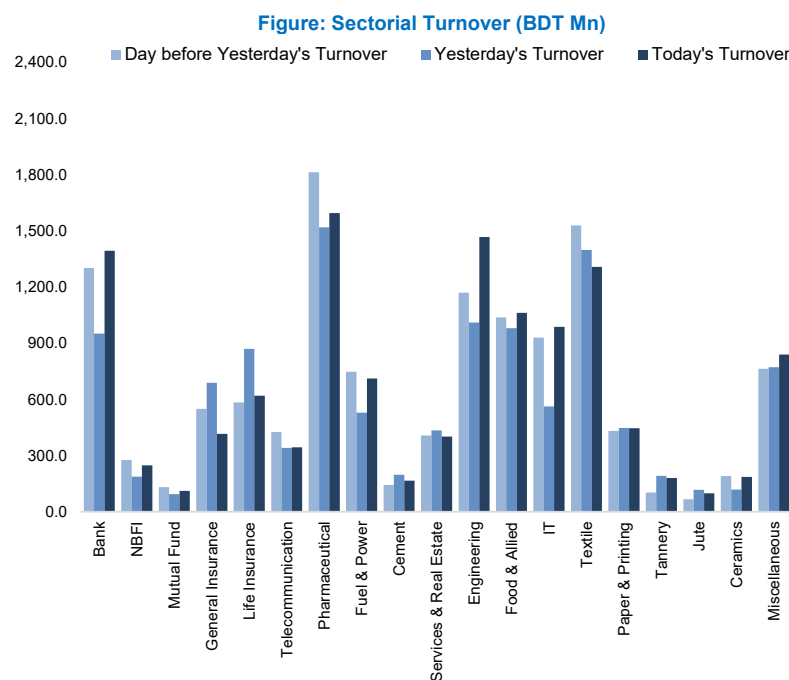
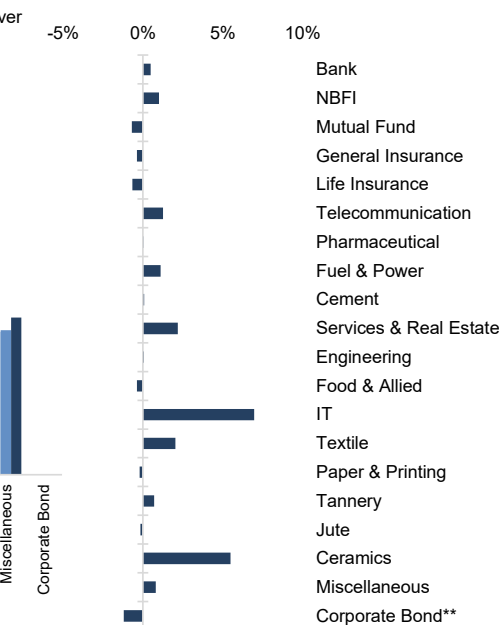


Figure: Sectorial Mcap Change



Market PE 16.8x

Market PB 1.3x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, 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	1,557	1,550	+7.51	+0.48%	36	736,838	10.1%	1,393.7	11.1%	NM	0.8x	GP	418,998	11.1%	64.6	14.2x	7.4x
NBFI	1,096	1,085	+10.88	+1.00%	23	104,405	1.4%	248.0	2.0%	NM	NM	SQURPHARMA	198,565	5.3%	53.4	8.4x	1.5x
Mutual Fund	557	560	-3.84	-0.69%	37	26,672	0.4%	111.3	0.9%	NM	0.5x	BATBC	158,328	4.2%	42.3	12.8x	2.9x
General Insurance	2,947	2,958	-10.82	-0.37%	43	84,102	1.2%	415.7	3.3%	14.2x	1.3x	BRACBANK	153,700	4.1%	192.6	10.9x	1.8x
Life Insurance	2,161	2,175	-14.45	-0.66%	15	57,464	0.8%	618.9	4.9%	NM	NM	ROBI	152,948	4.1%	209.6	17.6x	2.4x
Telecommunication	5,117	5,053	+64.01	+1.27%	3	600,058	8.2%	343.7	2.7%	15.2x	4.4x	WALTONHIL	150,737	4.0%	54.7	11.7x	1.3x
Pharmaceutical	3,233	3,232	+0.86	+0.03%	34	612,872	8.4%	1,594.2	12.7%	14.1x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,204	1,191	+13.21	+1.11%	23	319,041	4.4%	711.4	5.7%	20.2x	0.7x	MARICO	92,106	2.4%	1.6	15.0x	27.6x
Cement	2,126	2,125	+1.73	+0.08%	7	101,330	1.4%	166.4	1.3%	23.3x	2.2x	UPGDCL	85,331	2.3%	13.4	7.3x	2.0x
Services & Real Estate	1,120	1,096	+24.00	+2.19%	9	61,622	0.8%	401.5	3.2%	28.3x	0.5x	BERGERPBL	72,628	1.9%	8.4	20.7x	4.2x
Engineering	2,723	2,721	+1.73	+0.06%	42	307,193	4.2%	1,467.1	11.7%	14.5x	0.9x	LHB	65,850	1.7%	86.9	17.6x	3.5x
Food & Allied	15,295	15,351	-56.38	-0.37%	21	279,850	3.8%	1,062.2	8.4%	21.2x	4.4x	RENATA	57,796	1.5%	44.8	20.5x	1.7x
IT	2,237	2,092	+145.70	+6.97%	11	29,511	0.4%	986.8	7.8%	24.8x	1.9x	BXPHARMA	56,879	1.5%	91.3	8.9x	1.1x
Textile	1,247	1,222	+24.83	+2.03%	58	129,878	1.8%	1,307.8	10.4%	NM	0.9x	UNILEVERCL	48,097	1.3%	0.0	75.7x	26.4x
Paper & Printing	5,793	5,804	-11.33	-0.20%	6	26,170	0.4%	445.5	3.5%	NM	1.2x	ICB	45,011	1.2%	11.4	NM	1.1x
Tannery	2,186	2,171	+15.40	+0.71%	6	24,357	0.3%	180.4	1.4%	NM	1.8x	DUTCHBANGL	41,761	1.1%	23.6	11.1x	0.8x
Jute	14,691	14,713	-22.32	-0.15%	3	3,234	0.0%	98.8	0.8%	NM	NM	EBL	40,853	1.1%	40.8	5.8x	0.9x
Ceramics	447	424	+23.25	+5.49%	5	20,051	0.3%	186.5	1.5%	NM	1.3x	CITYBANK	40,008	1.1%	457.0	3.7x	0.7x
Miscellaneous	4,187	4,154	+33.24	+0.80%	15	227,381	3.1%	839.1	6.7%	90.1x	1.8x	PUBALIBANK	39,564	1.0%	37.4	5.4x	0.7x
Corporate Bond**	15,958	16,151	-193.40	-1.20%	16	35,231	0.5%	2.2	0.0%	NM	NM	PRIMEBANK	34,237	0.9%	65.4	4.1x	0.8x
Treasury Bond**	2,264	2,269	-4.39	-0.19%	235	3,505,239	48.1%	8.6	0.1%	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
MIRACLEIND	33.0	+10.0%	31.2	NM	1.8x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	CITYBANK	26.3	+3.5%	457.0	3.7x	0.7x
INTECH	37.5	+10.0%	27.5	NM	NM	ISLAMIBANK	74,730	5.3%	NM	1.0x	LOVELLO	103.7	+4.5%	393.5	46.7x	8.2x
INDEXAGRO	86.3	+9.9%	63.2	15.4x	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	KBPWPBIL	138.6	+9.7%	329.1	NM	11.6x
NAHEEACP	24.4	+9.9%	57.6	90.4x	1.3x	BATBC	50,233	3.6%	12.8x	2.9x	ORIONINFU	550.2	-2.0%	329.0	NM	35.0x
BDCOM	30.4	+9.7%	72.7	36.9x	2.0x	WALTONHIL	46,773	3.3%	11.7x	1.3x	ITC	47.5	+8.4%	217.8	12.7x	2.1x
MONNOFABR	20.4	+9.68%	86.4	NM	0.8x	BRACBANK	46,489	3.3%	10.9x	1.8x	ROBI	29.2	+2.1%	209.6	17.6x	2.4x
HRTEX	34.0	+9.7%	58.3	NM	11x	GP	44,708	3.2%	14.2x	7.4x	BRACBANK	77.2	-1.2%	192.6	10.9x	1.8x
KBPWPBIL	138.6	+9.7%	329.1	NM	11.6x	RENATA	32,968	2.3%	20.5x	1.7x	AGNISYSL	28.4	+4.8%	190.1	21.4x	1.6x
BBSCABLES	18.3	+9.6%	47.2	NM	0.6x	BXPHARMA	23,409	1.7%	8.9x	1.1x	INTRACO	28.1	+5.6%	186.1	24.9x	2.1x
SAFKOSPINN	16.2	+9.5%	1.5	NM	NM	PUBALIBANK	22,905	1.6%	5.4x	0.7x	BEACHHATCH	58.3	+3.0%	182.7	12.4x	3.5x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.7x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
GSPFINANCE	3.1	-8.8%	2.5	NM	0.2x	LHB	20,953	1.5%	17.6x	3.5x	KBPWPBIL	126.0	113.9	12.0	625	71.48
PRIMEFIN	2.5	-7.4%	1.8	NM	0x	OLYMPIC	20,496	1.5%	18.1x	2.8x	MARICO	2,920.0	2,920.0	2.0	11	32.12
RELIANCE1	12.9	-6.5%	8.9	NM	1.2x	ALARABANK	18,282	1.3%	37.1x	0.8x	LOVELLO	108.0	89.3	2.0	106	9.58
PHOENIXFIN	3.2	-5.9%	0.7	NM	NM	BEACONPHAR	17,838	1.3%	37.4x	5.0x	ORIONINFU	578.0	519.2	5.0	17	9.24
FASFIN	1.7	-5.6%	0.9	NM	NM	PRIMEBANK	16,142	1.1%	4.1x	0.8x	RELIANCE1	15.1	15.0	7.0	593	8.93
FAREASTFIN	1.7	-5.6%	1.2	NM	NM	ROBI	14,876	1.1%	17.6x	2.4x	FINEFOODS	288.0	288.0	1.0	20	5.76
ILFSL	1.9	-5.0%	0.8	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	BEACONPHAR	149.0	125.0	3.0	38	5.57
FAMILYTEX	1.9	-5.0%	0.9	NM	0.2x	NBL	13,055	0.9%	NM	NM	NHFIL	25.1	25.1	1.0	220	5.52
PREMIERLEA	1.9	-5.0%	0.3	NM	NM	BSRMLTD	12,852	0.9%	5.2x	0.6x	CLICL	61.1	58.0	3.0	90	5.37
PROGRESLIF	60.1	-4.8%	5.4	NM	NM	* 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					SPCERAMICS	21.0	21.0	2.0	150	3.15

\* 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
KBPPWBIL	126.0	113.9	71.5	625	12
MARICO	2,920.0	2,920.0	32.1	11	2
LOVELLO	108.0	89.3	9.6	106	2
ORIONINFU	578.0	519.2	9.2	17	5
RELIANCE1	15.1	15.0	8.9	593	7
FINEFOODS	288.0	288.0	5.8	20	1
BEACONPHAR	149.0	125.0	5.6	38	3
NHFIL	25.1	25.1	5.5	220	1
CLICL	61.1	58.0	5.4	90	3
SPCERAMICS	21.0	21.0	3.2	150	2
SAPORTL	30.0	30.0	2.8	94	1
MEGHNACEM	55.0	55.0	2.8	50	2
INTRACO	25.3	25.3	2.5	100	1
IFIC	6.0	6.0	2.4	400	1
CAPMBDBLMF	8.8	8.7	2.3	260	2
MONOSPOOL	133.0	133.0	2.2	17	1
TRUSTBANK	20.0	20.0	2.0	100	1
PREMIERBAN	7.1	7.1	1.8	250	1
INDEXAGRO	84.0	81.5	1.7	20	2
SAMATALETH	122.5	122.5	1.6	13	1
ENVOYTEX	56.3	52.0	1.6	29	2
MONNOFABR	18.6	18.6	1.5	80	1
<b>Total</b>			<b>190.7</b>		<b>65</b>

**Important DSE News**
**NCCBANK**

Mrs. Sohela Hossain, a Sponsor of the Company, has completed her buying of 20,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 21.08.2025.

**SAMATALETH**

(Q1 Financials): EPS was Tk. (0.09) for July-September 2024 as against Tk. (0.02) for July-September 2023. NOCFPS was Tk. (0.06) for July-September 2024 as against Tk. (0.08) for July-September 2023. NAV per share was Tk. 14.28 as on September 30, 2024 and Tk. 14.37 as on June 30, 2024.

**NAVANAPHAR**

The company has informed that the Board of Directors of the company in its meeting held on 1st September, 2025 has decided to repay the subscribed amount of Navana Pharmaceuticals Partial Convertible Bond earlier than maturity without any conversion due to the under subscription, subject to the approval from Bangladesh Securities and Exchange commission.

**DHAKABANK**

Mr. A.T.M. Hayatuzzaman Khan, a Sponsor of the company, has informed that he will receive 517,065 shares of the company from his sister Ms. Zaheda Wahed Khan (a General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from August 31, 2025

**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

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