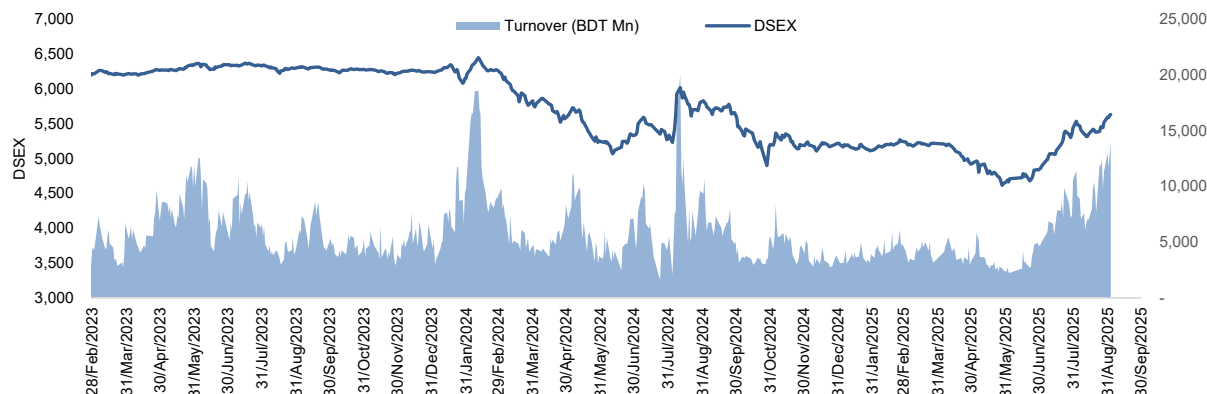


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.19%) gained 10.7 points and closed at 5,631.62. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (+0.04%), and the large-cap index CDSET (+0.10%) closed at 2,195.83, 1,233.68, and 1,144.52 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 1.85%, followed by Bank (+0.60%), Telecommunication (+0.12%), Fuel & Power (-0.04%), Pharmaceutical (-0.16%), Food & Allied (-0.30%), and Engineering (-0.61%), respectively. Block trades contributed 2.9% of the overall market turnover. The City Bank Ltd. (+4.2%) was the most traded share with a turnover of BDT 699 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,631.62	5,620.92	+10.70	+0.19%	+8.0%
DS30	2,195.83	2,195.11	+0.72	+0.03%	+13.2%
DSES	1,233.68	1,233.14	+0.55	+0.04%	+5.5%
CDSET	1,144.52	1,143.41	+1.11	+0.10%	+7.4%

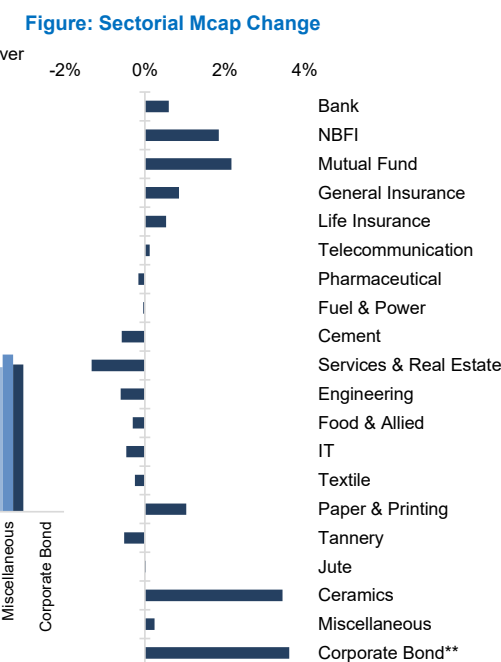
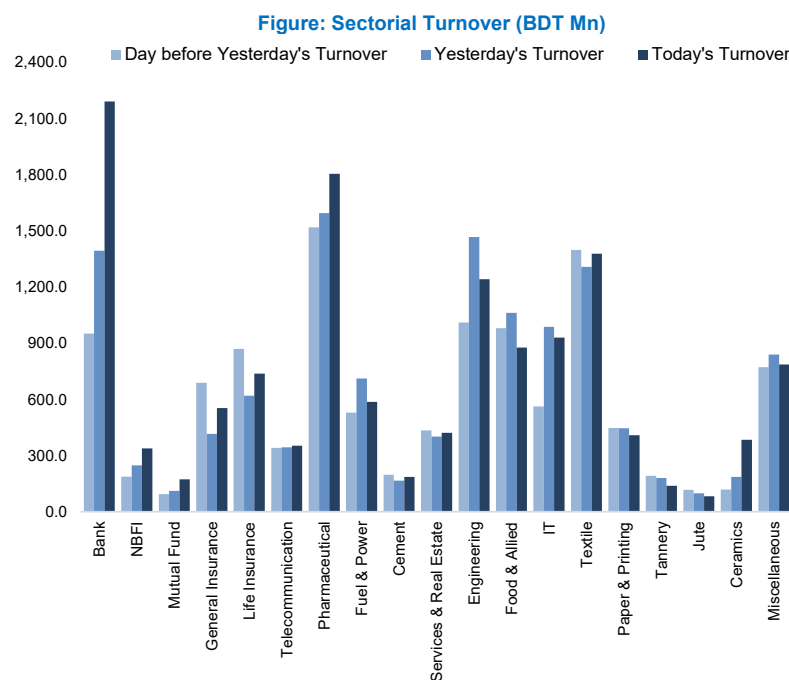
	Advanced	Declined	Unchanged	Total
All Category	184	165	47	396
A Category (Equity)	121	77	20	218
B Category (Equity)	30	44	8	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	33	44	19	96
Mutual Funds	28	0	6	34
Corporate Bonds	2	0	0	2
Treasury Bonds	0	2	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,297,184	7,285,560	+0.2%
	Mn USD	59,960	59,864	
Turnover	Mn BDT	13,976	12,781	+9.4%
	Mn USD	115	105	
Volume	Mn Shares	437	383	+14.0%
No. of Trade		319,051	317,634	+0.4%

* Average Interbank Exchange Rate is BDT 121.70 as of Sep 03, 2025

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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	1,567	1,557	+9.35	+0.60%	36	741,264	10.1%	2,190.1	16.1%	NM	0.8x	GP	418,188	11.1%	26.9	14.2x	7.3x
NBFI	1,116	1,096	+20.28	+1.85%	23	106,337	1.5%	338.4	2.5%	NM	NM	SQURPHARMA	198,210	5.2%	94.8	8.4x	1.5x
Mutual Fund	569	557	+12.08	+2.17%	37	27,251	0.4%	172.7	1.3%	NM	0.5x	BATBC	158,004	4.2%	38.8	12.7x	2.9x
General Insurance	2,972	2,947	+25.29	+0.86%	43	84,824	1.2%	554.1	4.1%	14.3x	1.3x	ROBI	153,995	4.1%	189.3	17.7x	2.4x
Life Insurance	2,172	2,161	+11.55	+0.53%	15	57,772	0.8%	737.8	5.4%	NM	NM	BRACBANK	150,912	4.0%	165.7	10.7x	1.8x
Telecommunication	5,124	5,117	+6.33	+0.12%	3	600,800	8.2%	352.2	2.6%	15.2x	4.4x	WALTONHIL	149,435	4.0%	39.4	11.6x	1.3x
Pharmaceutical	3,227	3,233	-5.19	-0.16%	34	611,887	8.4%	1,803.9	13.3%	14.0x	1.7x	BEXIMCO	103,850	2.7%	0.0	NM	1.3x
Fuel & Power	1,204	1,204	-0.50	-0.04%	23	318,908	4.4%	586.2	4.3%	20.2x	0.7x	MARICO	92,166	2.4%	9.9	15.0x	27.6x
Cement	2,114	2,126	-12.28	-0.58%	7	100,745	1.4%	186.4	1.4%	23.2x	2.2x	UPGDCL	85,273	2.3%	12.0	7.3x	2.0x
Services & Real Estate	1,106	1,120	-14.95	-1.33%	9	60,800	0.8%	420.7	3.1%	28.0x	0.5x	BERGERPBL	72,647	1.9%	26.0	20.7x	4.2x
Engineering	2,707	2,723	-16.59	-0.61%	42	305,321	4.2%	1,241.5	9.1%	14.4x	0.9x	LHB	65,269	1.7%	109.8	17.4x	3.4x
Food & Allied	15,248	15,295	-46.47	-0.30%	21	279,000	3.8%	876.6	6.5%	21.1x	4.4x	RENATA	57,807	1.5%	82.9	20.5x	1.7x
IT	2,227	2,237	-10.44	-0.47%	11	29,374	0.4%	930.1	6.9%	24.7x	1.8x	BXPHARMA	57,415	1.5%	143.9	9.0x	1.2x
Textile	1,244	1,247	-3.14	-0.25%	58	129,552	1.8%	1,378.0	10.2%	NM	0.9x	UNILEVERCL	47,793	1.3%	0.8	75.2x	26.2x
Paper & Printing	5,853	5,793	+60.11	+1.04%	6	26,441	0.4%	408.5	3.0%	NM	1.3x	ICB	46,659	1.2%	42.2	NM	1.1x
Tannery	2,175	2,186	-11.37	-0.52%	6	24,230	0.3%	138.0	1.0%	NM	1.8x	CITYBANK	41,681	1.1%	698.7	3.8x	0.8x
Jute	14,695	14,691	+4.09	+0.03%	3	3,235	0.0%	82.9	0.6%	NM	NM	DUTCHBANGL	41,665	1.1%	18.3	11.1x	0.8x
Ceramics	462	447	+15.41	+3.45%	5	20,743	0.3%	384.1	2.8%	NM	1.3x	EBL	40,693	1.1%	308.0	5.8x	0.9x
Miscellaneous	4,197	4,187	+10.25	+0.24%	15	227,938	3.1%	785.9	5.8%	90.3x	1.8x	PUBALIBANK	39,694	1.1%	31.7	5.4x	0.7x
Corporate Bond**	16,535	15,958	+577.26	+3.62%	16	36,506	0.5%	2.1	0.0%	NM	NM	PRIMEBANK	35,050	0.9%	57.7	4.2x	0.9x
Treasury Bond**	2,271	2,264	+6.51	+0.29%	235	3,511,247	48.1%	0.7	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					
INTECH	41.2	+9.9%	229.2	NM	NM	SQURPHARMA	108,958	7.7%	8.4x	1.5x	CITYBANK	27.4	+4.2%	698.7	3.8x	0.8x					
ZAHINTEX	6.0	+9.1%	3.5	NM	0.8x	ISLAMIBANK	74,730	5.3%	NM	1.0x	ORIONINFU	556.9	+1.2%	509.3	NM	35.4x					
NURANI	2.7	+8.0%	0.6	NM	0.3x	BEXIMCO	69,463	4.9%	NM	1.3x	EBL	25.5	-0.4%	308.0	5.8x	0.9x					
BDCOM	32.8	+7.9%	196.6	39.8x	2.1x	BATBC	50,233	3.6%	12.7x	2.9x	KBPPWBIL	139.3	+0.5%	302.9	NM	11.6x					
GOLDENSON	13.2	+7.3%	99.7	NM	0.8x	WALTONHIL	46,773	3.3%	11.6x	1.3x	JAMUNABANK	22.4	+3.7%	298.3	7.7x	0.9x					
FUWANGCER	14.7	+7.30%	137.8	98.0x	1.2x	BRACBANK	46,489	3.3%	10.7x	1.8x	MALEKSPIN	35.5	+3.8%	283.4	4.8x	0.6x					
SHYAMPSUG	185.1	+7.2%	8.2	NM	NM	GP	44,708	3.2%	14.2x	7.3x	LOVELLO	101.3	-2.3%	236.0	45.6x	8.0x					
POPULAR1MF	3.3	+6.5%	1.5	NM	0.4x	RENATA	32,968	2.3%	20.5x	1.7x	INTECH	41.2	+9.9%	229.2	NM	NM					
1STPRIMFMF	23.1	+6.5%	69.0	NM	2.2x	BXPHARMA	23,409	1.7%	9.0x	1.2x	SONALIPAPR	291.0	+5.3%	222.5	28.2x	1.7x					
DULAMIACOT	128.9	+6.4%	9.7	NM	NM	PUBALIBANK	22,905	1.6%	5.4x	0.7x	TILIL	89.2	+3.6%	197.3	11.9x	NM					
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.8x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
HRTEX	30.6	-10.0%	22.6	NM	10.3x	LHB	20,953	1.5%	17.4x	3.4x	KBPPWBIL	125.0	125.0	8.0	960	120.04					
PRIMEFIN	2.3	-8.0%	2.9	NM	0x	OLYMPIC	20,496	1.5%	18.0x	2.8x	PUBALIBANK	29.4	29.4	7.0	3,400	99.96					
PLFSL	1.3	-7.1%	2.0	NM	NM	ALARABANK	18,282	1.3%	37.7x	0.8x	GP	310.0	310.0	1.0	162	50.34					
BIFC	4.0	-7.0%	0.3	NM	NM	BEACONPHAR	17,838	1.3%	37.0x	4.9x	ASIATICLAB	56.9	50.0	5.0	798	40.52					
FAREASTFIN	1.6	-5.9%	1.0	NM	NM	PRIMEBANK	16,142	1.1%	4.2x	0.9x	ORIONINFU	523.6	509.9	7.0	71	36.81					
FASFIN	1.6	-5.9%	0.1	NM	NM	ROBI	14,876	1.1%	17.7x	2.4x	EXIM1STMF	4.4	4.2	4.0	1,935	8.18					
PREMIERLEA	1.8	-5.3%	0.1	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	SINOBANGLA	65.0	61.7	2.0	124	7.71					
ILFSL	1.8	-5.3%	0.9	NM	NM	NBL	13,055	0.9%	NM	NM	LOVELLO	95.0	94.0	2.0	75	7.06					
SAMATALETH	107.4	-5.0%	26.1	NM	7.5x	BSRMLTD	12,852	0.9%	5.3x	0.6x	DBH1STMF	6.0	5.8	4.0	727	4.28					
ISNLTD	106.2	-4.9%	97.5	NM	38.6x	* 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										CAPMBDBLMF	9.7	8.4	4.0	480	4.14

* 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	125.0	125.0	120.0	960	8
PUBALIBANK	29.4	29.4	100.0	3,400	7
GP	310.0	310.0	50.3	162	1
ASIATICLAB	56.9	50.0	40.5	798	5
ORIONINFU	523.6	509.9	36.8	71	7
EXIM1STMF	4.4	4.2	8.2	1,935	4
SINOBANGLA	65.0	61.7	7.7	124	2
LOVELLO	95.0	94.0	7.1	75	2
DBH1STMF	6.0	5.8	4.3	727	4
CAPMBDBLMF	9.7	8.4	4.1	480	4
TILIL	86.1	86.1	3.4	40	1
AMANFEED	27.8	27.8	2.9	105	1
PTL	58.5	58.0	2.5	42	3
CITYBANK	26.8	26.8	2.1	80	1
BEACHHATCH	58.6	58.6	2.1	35	1
GQBALLPEN	396.0	365.0	1.9	5	3
HAKKANIPUL	86.7	86.5	1.7	20	2
INTRACO	26.0	26.0	1.3	50	1
CLICL	62.0	60.3	1.2	20	2
MALEKSPIN	34.9	34.7	1.0	30	2
ISNLTD	103.7	103.7	1.0	10	1
SONALIPAPR	277.0	277.0	0.8	3	1
Total			404.5		69

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GSPFINANCE		0.0%	0.0%	Record Date	14-Oct-25
RUPALILIFE		0.0%	10.0%	Record Date	3-Nov-25

Important DSE News
GSPFINANCE

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 14.12.2025; Time: 11:30 AM; Venue: Will be announced later. Record Date: 14.10.2025. The Company has also reported Consolidated EPS of Tk. (11.79), Consolidated NAV per share of Tk. 4.60 and Consolidated NOCFPS of Tk. (1.06) for the year ended December 31, 2024 as against Tk. (9.73), Tk. 18.05 and Tk. (1.69) respectively for the year ended December 31, 2023.

(Q1 Financials): Consolidated EPS was Tk. (1.97) for January-March 2025 as against Tk. (1.11) for January-March 2024. Consolidated NOCFPS was Tk. (0.80) for January-March 2025 as against Tk. (0.04) for January-March 2024. Consolidated NAV per share was Tk. 2.63 as on March 31, 2025 and Tk. 4.60 as on December 31, 2024.

(Q2 Financials): Consolidated EPS was Tk. (2.83) for April-June 2025 as against Tk. (1.67) for April-June 2024; Consolidated EPS was Tk. (4.80) for January-June 2025 as against Tk. (3.16) for January-June 2024. Consolidated NOCFPS was Tk. (1.60) for January-June 2025 as against Tk. 0.17 for January-June 2024. Consolidated NAV per share was Tk. (0.20) as on June 30, 2025 and Tk. 4.60 as on December 31, 2024.

RENATA

The company has informed that it has launched Fludrocortisone 0.1 mg tablets in the UK market. The product is indicated for partial replacement therapy in primary adrenocortical insufficiency (Addison's disease) and for the treatment of salt-losing adrenogenital syndrome. Fludrocortisone 0.1 mg tablets are being supplied from the Company's UK MHRA-approved potent product facility and will be commercialized under the livery of Renata (UK) Limited. Notably, Renata's Fludrocortisone offers a significant advantage with its stability at storage conditions below 25 degree Celsius, in contrast to the innovator product requiring refrigeration between 2-8 degree Celsius.

ISLAMIBANK

Mr. M. Zubaidur Rahman, an Independent Director of the company, has expressed his intention to sell his entire holding of 149,622 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within next 30 working days.

HRTEX

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., September 03, 2025 according to provision 1(d) of BSEC Directive No. BSEC/CMRRCD/2009-193/77 dated May 20, 2024 since accumulated loss or negative balance of retained earnings after adjustment of revenue reserve of the company exceeds its paid-up capital.

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