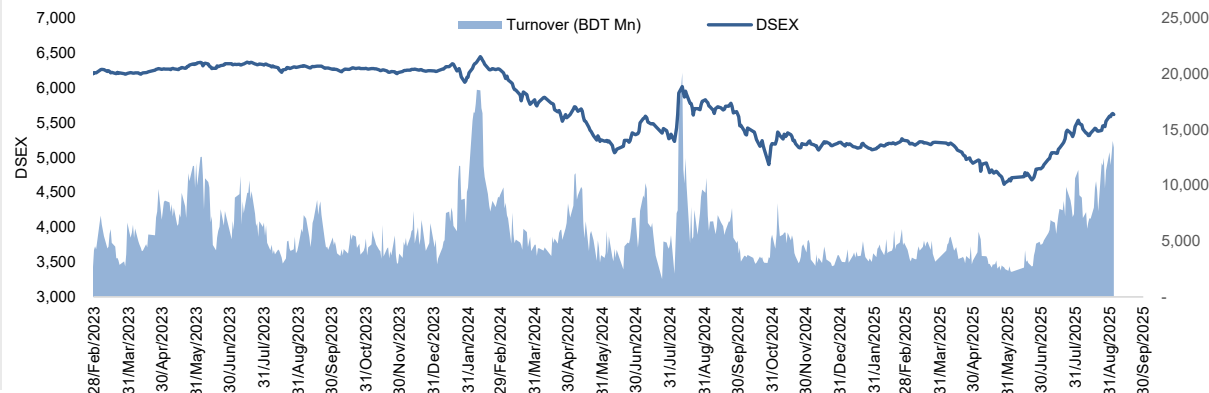


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.31%) lost 17.34 points and closed at 5,614.28. The blue-chip index DS30 (-0.60%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.90%) closed at 2,182.76, 1,230.06, and 1,134.19 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 1.62% followed by Bank (-1.30%), Engineering (-0.96%), Fuel & Power (-0.69%), Food & Allied (-0.29%), Pharmaceutical (-0.20%), and NBFI (+1.83%), respectively. Block trades contributed 2.5% of the overall market turnover. The City Bank Ltd. (-1.1%) was the most traded share with a turnover of BDT 463 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,614.28	5,631.62	-17.34	-0.31%	+7.6%
DS30	2,182.76	2,195.83	-13.08	-0.60%	+12.5%
DSES	1,230.06	1,233.68	-3.63	-0.29%	+5.2%
CDSET	1,134.19	1,144.52	-10.33	-0.90%	+6.4%

	Advanced	Declined	Unchanged	Total
All Category	175	145	72	392
A Category (Equity)	99	89	28	216
B Category (Equity)	38	30	13	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	38	26	31	95
Mutual Funds	12	7	14	33
Corporate Bonds	0	2	0	2
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,277,929	7,297,184	-0.3%
	Mn USD	59,802	59,960	
Turnover	Mn BDT	13,385	13,976	-4.2%
	Mn USD	110	115	
Volume	Mn Shares	411	437	-6.0%
No. of Trade		323,036	319,051	+1.2%

* Average Interbank Exchange Rate is BDT 121.70 as of Sep 04, 2025

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Figure: Sectorial Turnover (BDT Mn)

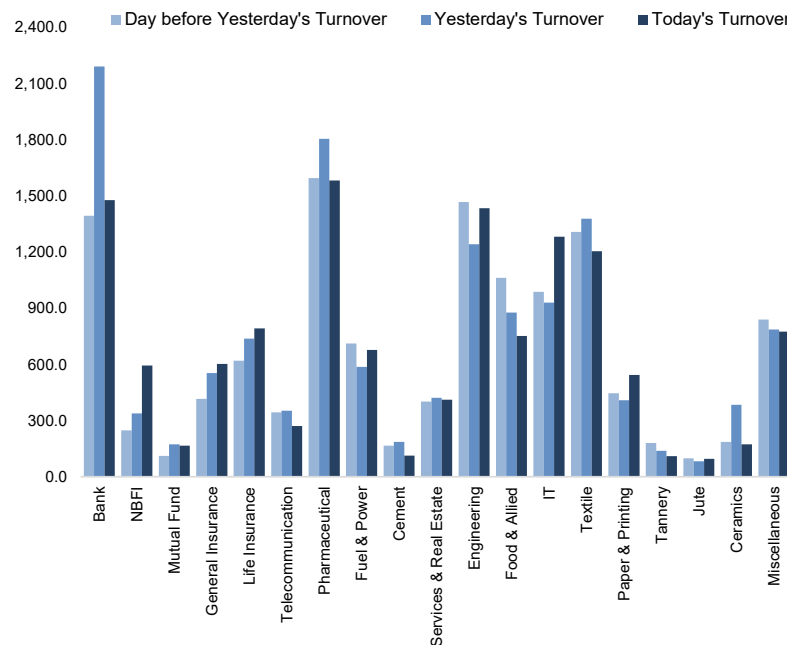
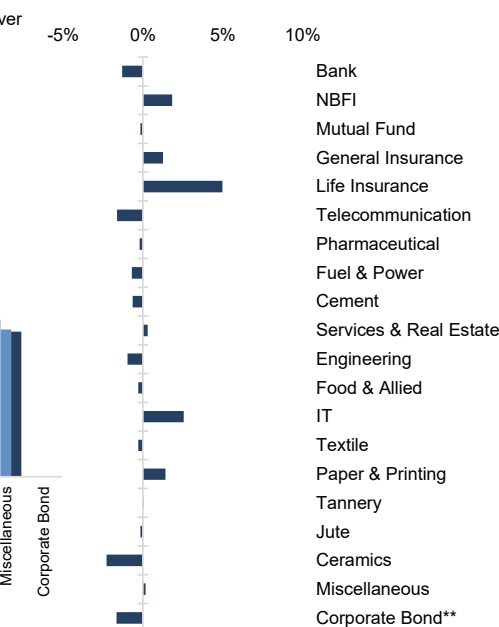


Figure: Sectorial Mcap Change



Market PE 16.9x

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	1,546	1,567	-20.42	-1.30%	36	731,601	10.0%	1,476.4	11.3%	NM	0.8x	GP	411,031	10.9%	51.0	14.0x	7.2x
NBFI	1,136	1,116	+20.38	+1.83%	23	108,280	1.5%	593.8	4.5%	NM	NM	SQURPHARMA	196,526	5.2%	101.8	8.4x	1.5x
Mutual Fund	568	569	-0.84	-0.15%	37	27,211	0.4%	166.2	1.3%	NM	0.5x	BATBC	157,626	4.2%	37.2	12.7x	2.9x
General Insurance	3,010	2,972	+37.32	+1.26%	43	85,889	1.2%	602.8	4.6%	14.5x	1.3x	ROBI	151,900	4.0%	136.4	17.5x	2.4x
Life Insurance	2,281	2,172	+108.40	+4.99%	15	60,655	0.8%	792.5	6.1%	NM	NM	BRACBANK	146,930	3.9%	271.9	10.4x	1.7x
Telecommunication	5,041	5,124	-83.21	-1.62%	3	591,043	8.1%	270.3	2.1%	15.0x	4.3x	WALTONHIL	145,830	3.9%	142.8	14.1x	1.2x
Pharmaceutical	3,221	3,227	-6.61	-0.20%	34	610,634	8.4%	1,580.8	12.1%	14.0x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,196	1,204	-8.27	-0.69%	23	316,717	4.3%	676.9	5.2%	20.0x	0.7x	MARICO	92,245	2.5%	4.1	15.1x	27.7x
Cement	2,100	2,114	-13.68	-0.65%	7	100,093	1.4%	112.7	0.9%	23.1x	2.2x	UPGDCL	84,404	2.2%	13.1	7.2x	2.0x
Services & Real Estate	1,109	1,106	+3.41	+0.31%	9	60,988	0.8%	412.0	3.2%	28.1x	0.5x	BERGERPBL	72,613	1.9%	10.6	20.7x	4.2x
Engineering	2,681	2,707	-26.00	-0.96%	42	302,388	4.2%	1,433.0	11.0%	16.2x	0.9x	LHB	64,805	1.7%	52.7	17.3x	3.4x
Food & Allied	15,205	15,248	-43.61	-0.29%	21	278,202	3.8%	752.1	5.8%	21.1x	4.4x	BXPHARMA	58,798	1.6%	230.8	9.2x	1.2x
IT	2,284	2,227	+56.97	+2.56%	11	30,125	0.4%	1,281.5	9.8%	25.3x	1.9x	RENATA	57,910	1.5%	48.4	20.6x	1.7x
Textile	1,240	1,244	-3.64	-0.29%	58	129,172	1.8%	1,204.4	9.2%	NM	0.9x	UNILEVERCL	47,638	1.3%	0.8	75.0x	26.1x
Paper & Printing	5,935	5,853	+82.86	+1.42%	6	26,815	0.4%	543.0	4.2%	NM	1.3x	ICB	46,745	1.2%	34.3	NM	1.1x
Tannery	2,175	2,175	+0.68	+0.03%	6	24,238	0.3%	110.5	0.8%	NM	1.8x	CITYBANK	41,225	1.1%	463.1	3.8x	0.8x
Jute	14,673	14,695	-21.60	-0.15%	3	3,230	0.0%	95.3	0.7%	NM	NM	DUTCHBANGL	41,085	1.1%	14.2	10.9x	0.8x
Ceramics	452	462	-10.50	-2.27%	5	20,272	0.3%	173.5	1.3%	NM	1.3x	EBL	40,693	1.1%	108.3	5.8x	0.9x
Miscellaneous	4,204	4,197	+6.84	+0.16%	15	228,309	3.1%	774.1	5.9%	90.5x	1.8x	PUBALIBANK	38,913	1.0%	23.2	5.3x	0.7x
Corporate Bond**	16,261	16,535	-274.02	-1.66%	16	35,901	0.5%	0.1	0.0%	NM	NM	PRIMEBANK	34,586	0.9%	36.9	4.1x	0.8x
Treasury Bond**	2,274	2,271	+3.67	+0.16%	235	3,513,131	48.2%	0.9	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
RUPALILIFE	104.6	+10.0%	81.7	NM	NM	SQURPHARMA	108,958	7.7%	8.4x	1.5x	CITYBANK	27.1	-1.1%	463.1	3.8x	0.8x
PRAGATILIF	184.1	+10.0%	102.2	NM	NM	ISLAMIBANK	74,730	5.3%	NM	1.0x	ORIONINFU	571.6	+2.6%	314.9	NM	36.4x
INTECH	45.3	+10.0%	120.3	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	KBPWBIL	138.6	-0.5%	314.5	NM	11.6x
EGEN	28.2	+9.7%	204.3	35.3x	1.2x	BATBC	50,233	3.6%	12.7x	2.9x	AGNISYSL	29.5	+5.0%	285.3	22.2x	1.7x
SUNLIFEINS	62.8	+9.6%	76.1	NM	NM	WALTONHIL	46,773	3.3%	14.1x	1.2x	ITC	47.8	+0.4%	273.3	12.8x	2.1x
BBSCABLES	20.7	+9.52%	95.4	NM	0.7x	BRACBANK	46,489	3.3%	10.4x	1.7x	BRACBANK	73.8	-2.6%	271.9	10.4x	1.7x
CAPMBDBLMF	10.4	+9.5%	14.5	NM	1x	GP	44,708	3.2%	14.0x	7.2x	IPDC	21.6	+9.1%	246.8	21.7x	1.3x
WMSHIPYARD	9.4	+9.3%	44.8	NM	0.6x	RENATA	32,968	2.3%	20.6x	1.7x	SONALIPAPR	299.8	+3.0%	246.7	29.1x	1.8x
IPDC	21.6	+9.1%	246.8	21.7x	1.3x	BXPHARMA	23,409	1.7%	9.2x	1.2x	BXPHARMA	131.8	+2.4%	230.8	9.2x	1.2x
GQBALLPEN	442.1	+8.1%	51.4	NM	3.2x	PUBALIBANK	22,905	1.6%	5.3x	0.7x	LOVELLO	101.9	+0.6%	208.5	45.9x	8.1x
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	27.9	-8.8%	35.5	NM	9.4x	LHB	20,953	1.5%	17.3x	3.4x	ORIONINFU	540.0	515.9	16.0	427	222.52
FASFIN	1.5	-6.3%	2.0	NM	NM	OLYMPIC	20,496	1.5%	17.9x	2.7x	PRAGATILIF	170.5	164.0	2.0	105	17.87
SAFKOSPINN	15.2	-5.6%	4.2	NM	NM	ALARABANK	18,282	1.3%	37.3x	0.8x	SUNLIFEINS	59.8	55.0	3.0	245	14.22
SSSTEEL	5.4	-3.6%	3.0	NM	0.2x	BEACONPHAR	17,838	1.3%	35.7x	4.8x	CITYGENINS	58.2	58.0	5.0	210	12.21
FIRSTFIN	2.7	-3.6%	0.2	NM	NM	PRIMEBANK	16,142	1.1%	4.1x	0.8x	HAKKANIPUL	82.0	79.0	4.0	87	6.90
APOLOISPAT	2.8	-3.4%	0.7	NM	0.1x	ROBI	14,876	1.1%	17.5x	2.4x	EASTRNLUB	2,660.0	2,600.0	3.0	2	6.31
FIRSTSBANK	2.8	-3.4%	3.9	NM	1.2x	UTTARABANK	13,699	1.0%	NM	0.8x	IDLC	42.2	42.2	1.0	147	6.20
BEACONPHAR	132.5	-3.4%	138.6	35.7x	4.8x	NBL	13,055	0.9%	NM	NM	YPL	19.4	19.4	1.0	300	5.82
RAK CERAMIC	26.0	-3.3%	29.2	NM	1.7x	BSRMLTD	12,852	0.9%	5.2x	0.6x	AL-HAJTEX	167.9	167.9	3.0	25	4.18
CNATEX	2.9	-3.3%	1.9	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					FINEFOODS	288.0	273.0	3.0	15	4.16

* 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	540.0	515.9	222.5	427	16
PRAGATILIF	170.5	164.0	17.9	105	2
SUNLIFEINS	59.8	55.0	14.2	245	3
CITYGENINS	58.2	58.0	12.2	210	5
HAKKANIPUL	82.0	79.0	6.9	87	4
EASTRNLUB	2,660.0	2,600.0	6.3	2	3
IDLC	42.2	42.2	6.2	147	1
YPL	19.4	19.4	5.8	300	1
AL-HAJTEX	167.9	167.9	4.2	25	3
FINEFOODS	288.0	273.0	4.2	15	3
GQBALLPEN	375.3	375.0	3.3	9	2
BATBC	291.5	291.5	3.2	11	1
NAVANAPHAR	65.0	65.0	2.6	40	1
BPML	34.8	34.8	2.4	70	1
WALTONHIL	476.9	476.9	2.4	5	1
CLICL	60.0	58.0	2.2	38	2
IPDC	20.6	19.9	2.2	108	2
BEACONPHAR	150.8	123.7	1.6	12	3
BXPHARMA	130.5	130.3	1.2	9	2
DBH1STMF	5.8	5.8	1.2	200	1
QUASEMIND	48.0	48.0	1.1	23	1
BSCPLC	155.0	155.0	1.0	6	1
Total			332.5		70

Important DSE News
WALTONHIL

The Board of Directors has recommended 175% Cash and 10% Stock dividend for the year ended June 30, 2025. Date of AGM: 28.10.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 28.09.2025. The Company has also reported EPS of Tk. 34.22, NAV per share of Tk. 399.74 (with revaluation), Tk. 288.29 (without revaluation) and NOCFPS of Tk. 58.20 for the year ended June 30, 2025 as against Tk. 44.78, Tk. 379.30 (with revaluation), Tk. 277.86 (without revaluation) and Tk. 56.96 respectively for the year ended June 30, 2024.

BRACBANK

The company has informed that Mr. Tareq Refat Ullah Khan has been appointed as the Managing Director and CEO of the company effective from 02 September, 2025.

DHAKABANK

Mr. A.T.M. Hayatuzzaman Khan, a Sponsor of the company, has further informed that he has received 517,065 shares of the company from his sister Ms. Zaheda Wahed Khan as per declaration disseminated by DSE on 02.09.2025.

NRBCBANK

Mr. Syed Munsif Ali, a Sponsor of the Company, has completed his selling of 30,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 26.08.2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
WALTONHIL		10.0%	175.0%	Record Date	28-Sep-25
GSPFINANCE		0.0%	0.0%	Record Date	14-Oct-25
RUPALILIFE		0.0%	10.0%	Record Date	3-Nov-25

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