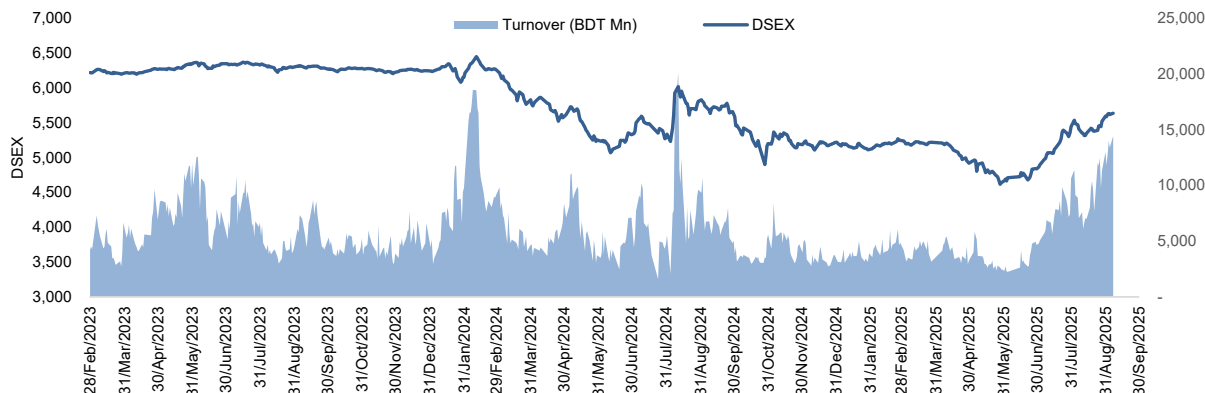


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.39%) gained 21.87 points and closed at 5,636.15. The blue-chip index DS30 (+0.24%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (-0.08%) closed at 2,188.10, 1,229.44, and 1,133.28 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 4.90% followed by Telecommunication (+1.16%), Engineering (+1.02%), Fuel & Power (+0.80%), Food & Allied (+0.19%), Pharmaceutical (-0.37%), and Bank (-0.45%), respectively. Block trades contributed 2.2% of the overall market turnover. Robi Axiata PLC (+3.1%) was the most traded share with a turnover of BDT 371 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,636.15	5,614.28	+21.87	+0.39%	+8.0%
DS30	2,188.10	2,182.76	+5.35	+0.24%	+12.8%
DSES	1,229.44	1,230.06	-0.61	-0.05%	+5.2%
CDSET	1,133.28	1,134.19	-0.91	-0.08%	+6.3%

	Advanced	Declined	Unchanged	Total
All Category	248	127	25	400
A Category (Equity)	146	72	4	222
B Category (Equity)	56	20	6	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	46	35	15	96
Mutual Funds	35	0	1	36
Corporate Bonds	2	0	0	2
Treasury Bonds	1	3	0	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,271,032	7,277,929	-0.1%
	Mn USD	59,745	59,802	
Turnover	Mn BDT	14,419	13,385	+7.7%
	Mn USD	118	110	
Volume	Mn Shares	464	411	+13.0%
No. of Trade		346,042	323,036	+7.1%

\* Average Interbank Exchange Rate is BDT 121.70 as of Sep 07, 2025

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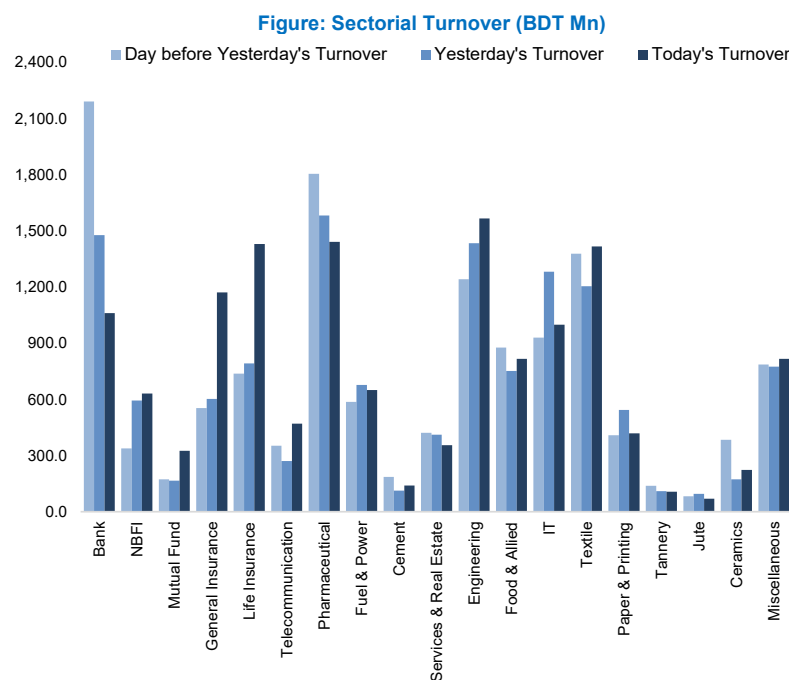
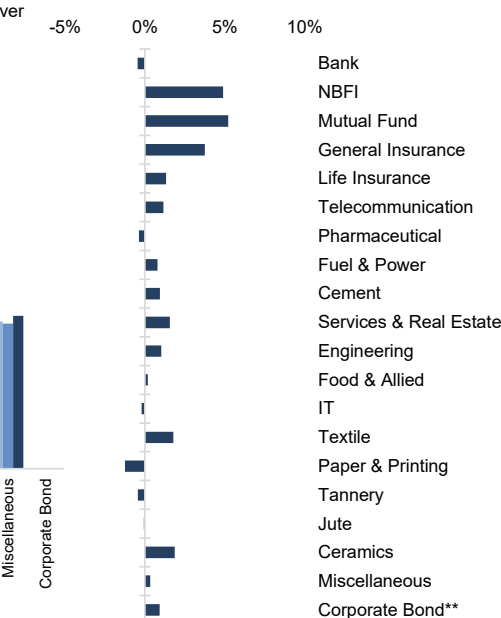


Figure: Sectorial Mcap Change



Market PE 17.0x

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	1,539	1,546	-6.96	-0.45%	36	728,309	10.0%	1,059.9	7.5%	NM	0.8x	GP	413,597	10.9%	17.3	14.1x	7.3x
NBFI	1,192	1,136	+55.64	+4.90%	23	113,581	1.6%	631.4	4.5%	NM	NM	SQRPHARMA	196,615	5.2%	60.7	8.4x	1.5x
Mutual Fund	597	568	+29.59	+5.21%	37	28,630	0.4%	324.6	2.3%	NM	0.5x	BATBC	157,896	4.2%	36.4	12.7x	2.9x
General Insurance	3,123	3,010	+113.20	+3.76%	43	89,120	1.2%	1,170.3	8.3%	15.0x	1.3x	ROBI	156,614	4.1%	370.9	18.0x	2.4x
Life Insurance	2,311	2,281	+30.26	+1.33%	15	61,460	0.8%	1,428.7	10.1%	NM	NM	BRACBANK	149,519	4.0%	129.7	10.6x	1.8x
Telecommunication	5,099	5,041	+58.41	+1.16%	3	597,893	8.2%	470.9	3.3%	15.2x	4.3x	WALTONHIL	145,527	3.9%	45.3	14.0x	1.2x
Pharmaceutical	3,209	3,221	-11.76	-0.37%	34	608,404	8.4%	1,441.3	10.2%	14.0x	1.7x	BEXIMCO	103,850	2.7%	0.0	NM	1.3x
Fuel & Power	1,205	1,196	+9.51	+0.80%	23	319,236	4.4%	649.4	4.6%	20.2x	0.7x	MARICO	92,078	2.4%	2.0	15.0x	27.6x
Cement	2,120	2,100	+19.80	+0.94%	7	101,037	1.4%	139.3	1.0%	23.3x	2.2x	UPGDCL	84,404	2.2%	13.0	7.2x	2.0x
Services & Real Estate	1,126	1,109	+17.26	+1.56%	9	61,937	0.9%	355.5	2.5%	28.5x	0.5x	BERGERPBL	72,642	1.9%	12.0	20.7x	4.2x
Engineering	2,708	2,681	+27.32	+1.02%	42	305,470	4.2%	1,565.7	11.1%	16.4x	0.9x	LHB	65,269	1.7%	62.9	17.4x	3.4x
Food & Allied	15,233	15,205	+28.14	+0.19%	21	278,716	3.8%	816.7	5.8%	21.1x	4.4x	RENATA	57,841	1.5%	45.8	20.6x	1.7x
IT	2,279	2,284	-4.49	-0.20%	11	30,066	0.4%	998.6	7.1%	25.3x	1.9x	BXPHARMA	57,548	1.5%	115.9	9.0x	1.2x
Textile	1,262	1,240	+22.08	+1.78%	58	131,471	1.8%	1,416.8	10.0%	NM	0.9x	ICB	49,781	1.3%	78.0	NM	1.2x
Paper & Printing	5,861	5,935	-74.04	-1.25%	6	26,481	0.4%	417.9	3.0%	NM	1.3x	UNILEVERCL	47,494	1.3%	0.5	74.8x	26.0x
Tannery	2,166	2,175	-9.66	-0.44%	6	24,130	0.3%	107.2	0.8%	NM	1.8x	CITYBANK	40,921	1.1%	215.7	3.8x	0.8x
Jute	14,664	14,673	-9.31	-0.06%	3	3,228	0.0%	69.5	0.5%	NM	NM	DUTCHBANGL	40,891	1.1%	20.9	10.9x	0.8x
Ceramics	460	452	+8.44	+1.87%	5	20,650	0.3%	222.8	1.6%	NM	1.3x	EBL	40,534	1.1%	58.0	5.8x	0.9x
Miscellaneous	4,218	4,204	+14.07	+0.33%	15	229,073	3.1%	815.8	5.8%	90.8x	1.8x	PUBALIBANK	38,262	1.0%	14.5	5.2x	0.7x
Corporate Bond**	16,411	16,261	+149.92	+0.92%	16	36,232	0.5%	1.2	0.0%	NM	NM	PRIMEBANK	34,470	0.9%	20.7	4.1x	0.8x
Treasury Bond**	2,257	2,274	-17.22	-0.76%	235	3,482,869	47.9%	3.9	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
GENNEXT	3.3	+10.0%	9.1	NM	0.3x	SQRPHARMA	108,958	7.7%	8.4x	1.5x	ROBI	29.9	+3.1%	370.9	18.0x	2.4x
GBBPOWER	7.7	+10.0%	6.8	20.8x	0.4x	ISLAMIBANK	74,730	5.3%	NM	0.9x	TILIL	81.2	-9.0%	343.3	12.9x	NM
RUPALILIFE	115.0	+9.9%	169.0	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	KBPPWBIL	148.3	+7.0%	342.3	NM	12.4x
KDSALTD	50.9	+9.9%	178.4	23.0x	1.9x	BATBC	50,233	3.6%	12.7x	2.9x	ORIONINFU	566.5	-0.9%	226.4	NM	36.1x
EGEN	31.0	+9.9%	178.6	38.8x	1.3x	WALTONHIL	46,773	3.3%	14.0x	1.2x	LOVELLO	104.0	+2.1%	222.7	46.9x	8.2x
BBSCABLES	22.7	+9.66%	67.0	NM	0.7x	BRACBANK	46,489	3.3%	10.6x	1.8x	SINOBANGLA	64.5	+2.9%	220.1	50.7x	2.5x
MONNOFABR	22.8	+9.6%	139.6	NM	1x	GP	44,708	3.2%	14.1x	7.3x	CITYBANK	26.9	-0.7%	215.7	3.8x	0.8x
CAPMBDBLMF	11.4	+9.6%	5.6	NM	1.4x	RENATA	32,968	2.3%	20.6x	1.7x	IPDC	23.2	+7.4%	180.6	23.3x	1.4x
CAPMIBLMF	9.3	+9.4%	7.7	NM	1.0x	BXPHARMA	23,409	1.7%	9.0x	1.2x	EGEN	31.0	+9.9%	178.6	38.8x	1.3x
SICL	26.0	+9.2%	45.6	NM	2.6x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	KDSALTD	50.9	+9.9%	178.4	23.0x	1.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.8x	0.8x						
TILIL	81.2	-9.0%	343.3	12.9x	NM	LHB	20,953	1.5%	17.4x	3.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PLFSL	1.2	-7.7%	1.4	NM	NM	OLYMPIC	20,496	1.5%	17.9x	2.7x	KBPPWBIL	135.0	124.8	20.0	870	112.09
SHYAMPUG	172.5	-6.8%	11.3	NM	NM	ALARABANK	18,282	1.3%	36.7x	0.8x	SUNLIFEINS	66.0	58.5	8.0	826	50.42
INTECH	42.8	-5.5%	173.0	NM	NM	BEACONPHAR	17,838	1.3%	35.1x	4.7x	ROBI	31.0	31.0	2.0	931	28.86
GIB	2.2	-4.3%	1.0	NM	NM	PRIMEBANK	16,142	1.1%	4.1x	0.8x	JAMUNABANK	22.5	21.6	2.0	1,150	25.52
UNIONBANK	2.2	-4.3%	7.4	5.9x	0.1x	ROBI	14,876	1.1%	18.0x	2.4x	BRACBANK	76.5	76.5	1.0	220	16.83
ICBIBANK	2.3	-4.2%	0.9	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	LOVELLO	98.0	91.8	5.0	136	12.63
YPL	18.8	-3.6%	19.3	NM	3.5x	NBL	13,055	0.9%	NM	NM	PTL	63.2	54.0	6.0	178	9.70
METROSPIN	10.9	-3.5%	5.3	NM	2.3x	BSRMLTD	12,852	0.9%	5.2x	0.6x	SQRPHARMA	223.7	223.7	1.0	39	8.61
AL-HAJTEX	163.8	-3.5%	38.3	NM	19.4x						TOSRIFA	22.5	19.6	2.0	332	7.38
											ORIONINFU	551.0	541.1	2.0	8	4.55

\* 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	135.0	124.8	112.1	870	20
SUNLIFEINS	66.0	58.5	50.4	826	8
ROBI	31.0	31.0	28.9	931	2
JAMUNABANK	22.5	21.6	25.5	1,150	2
BRACBANK	76.5	76.5	16.8	220	1
LOVELLO	98.0	91.8	12.6	136	5
PTL	63.2	54.0	9.7	178	6
SQURPHARMA	223.7	223.7	8.6	39	1
TOSRIFA	22.5	19.6	7.4	332	2
ORIONINFU	551.0	541.1	4.5	8	2
ASIATICLAB	56.1	54.1	3.6	65	2
CITYGENINS	59.1	59.1	3.0	50	1
TILIL	93.0	91.0	2.8	31	5
BXPHARMA	140.0	140.0	2.7	19	1
PRAGATILIF	201.0	197.0	2.6	13	4
CAPMBDBLMF	9.4	9.4	1.9	200	1
SEAPEARL	58.5	58.5	1.8	30	1
EXIM1STMF	4.4	4.4	1.6	365	1
RELIANCE1	14.8	14.8	1.3	87	2
AIL	54.0	54.0	1.2	23	2
KDSALTD	48.7	48.7	1.0	20	1
BSC	121.3	121.3	1.0	8	1
<b>Total</b>			<b>311.7</b>		<b>89</b>

#### 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

#### Important DSE News

##### SOUTHEASTB

Mr. Iftekhar Azim Ahmed, a Sponsor of the company, has expressed his intention to transfer 200,000 shares of the company to his son Mr. Saleh Ahmed (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from September 03, 2025.

##### HAKKANIPUL

The Board of Directors of the company in its meeting held on 06 September 2025 at the registered office of the company, has resolved to procure and install a Hot Water Generation System Machine. This hot water generation system machine will utilize the hot water of existing gas generator to produce extra steam without incurring any additional costs, thereby reducing the monthly gas bill of the current boiler system by approximately Tk. 3,16,800. As a result, the company anticipates an increase in annual net profit of approximately Tk. 38,00,000.00. The total cost of the Hot Water Generation System Machine, including installation, will be Tk. 40,00,000.00, which will be financed from the company's own funds.

The Board of Directors of the company in its meeting held on 06 September 2025 at the registered office of the company, has resolved to procure and install an Industrial 1000 Kg/Hr. EGB Boiler. This project (Industrial 1000 Kg/Hr. EGB Boiler) will utilize the exhaust gas discharged from the existing gas generator to produce steam without incurring any additional cost. It is expected to generate approximately 24 tons of steam per month (based on 24 working days), resulting in a reduction of monthly gas expenses by approximately Tk. 4,60,800. Consequently, the company anticipates an increase in its annual net profit by approximately Tk. 55,50,000.00. The total cost of the Industrial 1000 Kg/Hr. EGB Boiler System, including installation, is estimated at Tk. 40,00,000.00, which will be financed entirely from the company's own funds.

##### CONFIDCEM

The company has informed that the Board of Directors of the company in its Meeting held on 4th September 2025, among others, has taken the following decisions: 1. Proposal for Selling and Transferring of Company's entire Shareholdings in Confidence Cement Dhaka Limited: In view of the strategic objectives of the company and to meet its immediate financial obligations and exigencies, the Board of Directors of the Confidence Cement PLC. (the Company) has considered the proposal to sell and transfer the Company's entire shareholdings in Confidence Cement Dhaka Limited (140,975,157 Ordinary Shares of Tk. 10.00 each) to Confidence Power Holdings Ltd. (CPHL), at an aggregate value of Tk. 1,409,751,570.00 (Taka One Hundred Forty Crore Ninety Seven Lac Fifty One Thousand Five Hundred Seventy) and on such terms and conditions, as per the Share Purchase Agreement between the Company and CPHL subject to approval of the Shareholders in the General Meeting.

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