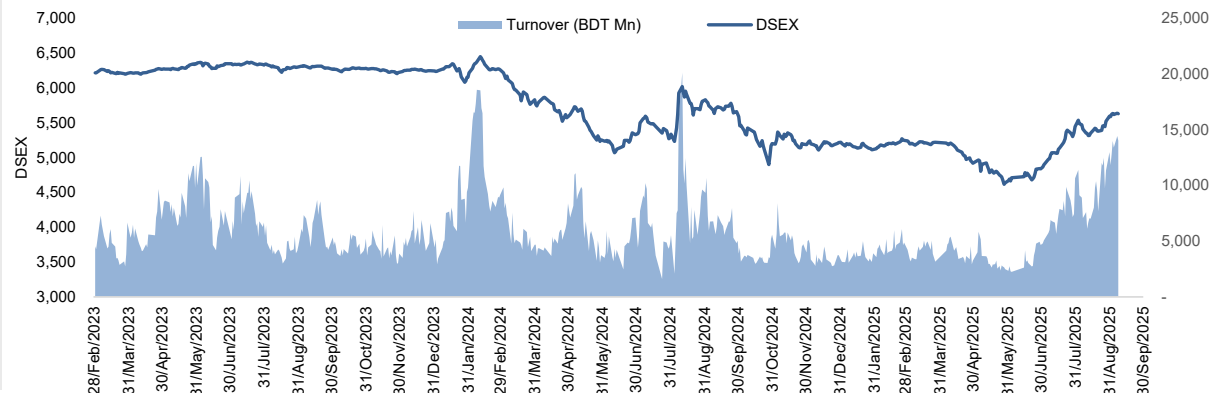


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.15%) lost 8.56 points and closed at 5,627.59. The blue-chip index DS30 (+0.18%), the Shariah-based index DSES (-0.34%), and the large-cap index CDSET (+0.02%) closed at 2,191.99, 1,225.21, and 1,133.56 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 1.98%, followed by NBFi (+0.73%), Fuel & Power (+0.41%), Food & Allied (-0.03%), Pharmaceutical (-0.35%), Bank (-0.39%), and Engineering (-0.76%), respectively. Block trades contributed 1.5% of the overall market turnover. Robi Axiata PLC (+8.4%) was the most traded share with a turnover of BDT 744 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,627.59	5,636.15	-8.56	-0.15%	+7.9%
DS30	2,191.99	2,188.10	+3.89	+0.18%	+13.0%
DSES	1,225.21	1,229.44	-4.23	-0.34%	+4.8%
CDSET	1,133.56	1,133.28	+0.28	+0.02%	+6.3%

	Advanced	Declined	Unchanged	Total
All Category	127	223	47	397
A Category (Equity)	53	148	20	221
B Category (Equity)	31	44	5	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	43	31	22	96
Mutual Funds	2	27	7	36
Corporate Bonds	2	1	0	3
Treasury Bonds	0	2	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,310,534	7,271,032	+0.5%
	Mn USD	60,043	59,719	
Turnover	Mn BDT	14,008	14,419	-2.8%
	Mn USD	115	118	
Volume	Mn Shares	475	464	+2.4%
No. of Trade		347,061	346,042	+0.3%

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 08, 2025

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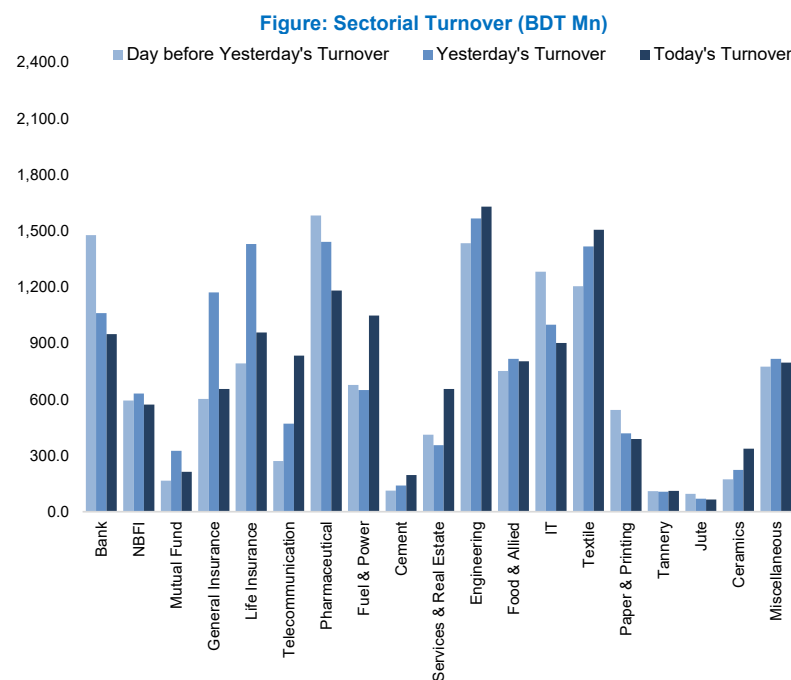
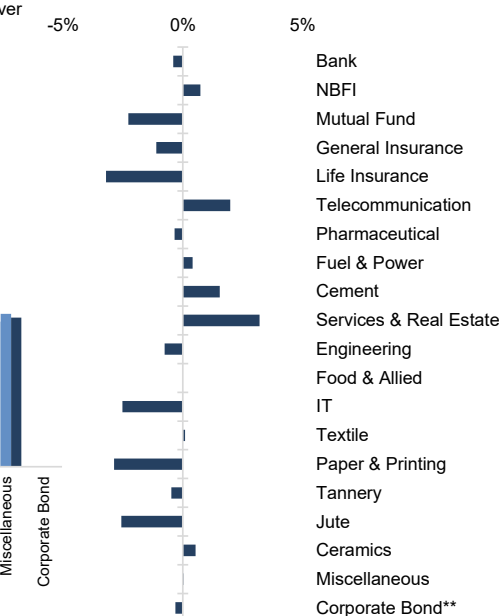


Figure: Sectorial Mcap Change



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	1,533	1,539	-6.08	-0.39%	36	725,433	9.9%	948.3	6.9%	NM	0.8x	GP	412,382	10.9%	26.3	14.0x	7.2x
NBFI	1,201	1,192	+8.70	+0.73%	23	114,411	1.6%	572.3	4.1%	NM	NM	SQURPHARMA	196,083	5.2%	55.9	8.3x	1.5x
Mutual Fund	584	597	-13.58	-2.27%	37	27,979	0.4%	213.3	1.5%	NM	0.5x	ROBI	169,709	4.5%	743.7	19.5x	2.6x
General Insurance	3,088	3,123	-34.55	-1.11%	43	88,134	1.2%	655.9	4.8%	14.8x	1.3x	BATBC	157,842	4.2%	36.6	12.7x	2.9x
Life Insurance	2,237	2,311	-74.07	-3.21%	15	59,490	0.8%	956.8	6.9%	NM	NM	BRACBANK	148,722	3.9%	91.1	10.5x	1.8x
Telecommunication	5,200	5,099	+100.83	+1.98%	3	609,716	8.4%	834.1	6.0%	15.5x	4.4x	WALTONHIL	143,800	3.8%	78.5	13.9x	1.2x
Pharmaceutical	3,198	3,209	-11.10	-0.35%	34	606,299	8.3%	1,181.0	8.6%	13.9x	1.7x	BEXIMCO	103,850	2.7%	0.0	NM	1.3x
Fuel & Power	1,210	1,205	+4.96	+0.41%	23	320,551	4.4%	1,047.1	7.6%	20.3x	0.7x	MARICO	92,153	2.4%	2.0	15.0x	27.6x
Cement	2,153	2,120	+32.61	+1.54%	7	102,591	1.4%	195.6	1.4%	23.6x	2.3x	UPGDCL	84,404	2.2%	14.1	7.2x	2.0x
Services & Real Estate	1,162	1,126	+36.12	+3.21%	9	63,924	0.9%	655.6	4.8%	29.4x	0.5x	BERGERPBL	72,672	1.9%	6.3	20.7x	4.2x
Engineering	2,687	2,708	-20.52	-0.76%	42	303,154	4.2%	1,629.3	11.8%	16.2x	0.9x	ISLAMIBANK	66,493	1.8%	33.1	NM	0.9x
Food & Allied	15,228	15,233	-4.87	-0.03%	21	278,627	3.8%	804.0	5.8%	21.1x	4.4x	RENATA	58,036	1.5%	49.4	20.6x	1.7x
IT	2,222	2,279	-57.38	-2.52%	11	29,309	0.4%	901.6	6.5%	24.7x	1.8x	BXPHARMA	57,192	1.5%	88.8	8.9x	1.2x
Textile	1,264	1,262	+1.26	+0.10%	58	131,603	1.8%	1,505.9	10.9%	NM	0.9x	ICB	50,214	1.3%	57.9	NM	1.2x
Paper & Printing	5,694	5,861	-167.91	-2.86%	6	25,722	0.4%	388.5	2.8%	NM	1.2x	UNILEVERCL	47,448	1.3%	0.8	74.7x	26.0x
Tannery	2,155	2,166	-10.23	-0.47%	6	24,016	0.3%	111.7	0.8%	NM	1.8x	EBL	40,853	1.1%	50.0	5.8x	0.9x
Jute	14,287	14,664	-376.87	-2.57%	3	3,145	0.0%	64.8	0.5%	NM	NM	CITYBANK	40,769	1.1%	177.7	3.7x	0.8x
Ceramics	463	460	+2.45	+0.53%	5	20,760	0.3%	336.7	2.4%	NM	1.3x	DUTCHBANGL	40,601	1.1%	16.3	10.8x	0.8x
Miscellaneous	4,219	4,218	+1.05	+0.02%	15	229,130	3.1%	796.5	5.8%	90.8x	1.8x	PUBALIBANK	38,392	1.0%	9.0	5.2x	0.7x
Corporate Bond**	16,361	16,411	-49.96	-0.30%	16	36,121	0.5%	0.9	0.0%	NM	NM	PRIMEBANK	34,237	0.9%	8.8	4.1x	0.8x
Treasury Bond**	2,265	2,257	+7.63	+0.34%	235	3,492,309	47.9%	0.6	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
AOL	16.5	+10.0%	22.3	31.7x	0.9x	SQURPHARMA	108,958	7.7%	8.3x	1.5x	ROBI	32.4	+8.4%	743.7	19.5x	2.6x
SALAMCRST	19.9	+9.9%	79.2	NM	1.1x	ISLAMIBANK	74,730	5.3%	NM	0.9x	KBPPWBIL	151.7	+2.3%	357.3	NM	12.7x
PENINSULA	14.1	+9.3%	19.4	NM	0.5x	BEXIMCO	69,463	4.9%	NM	1.3x	MJLBD	102.5	+3.3%	267.9	10.0x	2.0x
ROBI	32.4	+8.4%	743.7	19.5x	2.6x	BATBC	50,233	3.6%	12.7x	2.9x	TILIL	73.1	-10.0%	230.0	12.6x	NM
ALLTEX	13.1	+8.3%	15.4	NM	0.7x	WALTONHIL	46,773	3.3%	13.9x	1.2x	IPDC	23.5	+1.3%	227.4	23.6x	1.4x
KPCL	12.2	+7.02%	31.3	35.9x	0.6x	BRACBANK	46,489	3.3%	10.5x	1.8x	SEAPEARL	56.1	-	207.6	NM	3.4x
SPCERAMICS	21.6	+6.9%	132.9	NM	1x	GP	44,708	3.2%	14.0x	7.2x	LOVELLO	106.4	+2.3%	204.7	47.9x	8.4x
SPCL	52.4	+6.5%	162.7	NM	1.4x	RENATA	32,968	2.3%	20.6x	1.7x	EGEN	30.3	-2.3%	199.4	37.9x	1.3x
GENNEXT	3.5	+6.1%	13.5	NM	0.3x	BXPHARMA	23,409	1.7%	8.9x	1.2x	DOMINAGE	19.6	-3.9%	190.7	NM	1.1x
SILVAPHL	14.1	+6.0%	39.7	NM	0.9x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	ORIONINFU	546.7	-3.5%	188.6	NM	34.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.7x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
TILIL	73.1	-10.0%	230.0	12.6x	NM	LHB	20,953	1.5%	17.9x	3.5x	SQURPHARMA	230.6	230.6	1.0	200	46.15
PRIMELIFE	48.2	-6.9%	20.8	NM	NM	OLYMPIC	20,496	1.5%	17.9x	2.8x	ASIATICLAB	58.2	54.1	4.0	607	34.59
SAFKOSPINN	15.3	-6.7%	5.0	NM	NM	ALARABANK	18,282	1.3%	36.7x	0.8x	FINEFOODS	290.0	276.0	5.0	61	17.66
PADMALIFE	21.6	-6.5%	7.0	NM	NM	BEACONPHAR	17,838	1.3%	34.6x	4.6x	CITYBANK	27.4	24.3	2.0	650	17.50
CAPMIBLMF	8.7	-6.5%	3.5	NM	1.0x	PRIMEBANK	16,142	1.1%	4.1x	0.8x	LOVELLO	99.0	94.0	4.0	135	12.86
INTECH	40.2	-6.1%	130.4	NM	NM	ROBI	14,876	1.1%	19.5x	2.6x	TILIL	84.0	73.1	8.0	124	9.84
FAREASTLIF	30.1	-5.9%	2.7	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	DBH1STMF	5.8	5.8	3.0	1,461	8.48
FAREASTFIN	1.6	-5.9%	0.9	NM	NM	NBL	13,055	0.9%	NM	NM	KBPPWBIL	145.0	133.6	5.0	54	7.34
PHPMF1	3.2	-5.9%	3.5	NM	0.3x	BSRMLTD	12,852	0.9%	5.2x	0.6x	ACMELAB	84.0	83.0	3.0	80	6.70
POPULAR1MF	3.2	-5.9%	4.3	NM	0.3x	* 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										

* 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
SQURPHARMA	230.6	230.6	46.1	200	1
ASIATICLAB	58.2	54.1	34.6	607	4
FINEFOODS	290.0	276.0	17.7	61	5
CITYBANK	27.4	24.3	17.5	650	2
LOVELLO	99.0	94.0	12.9	135	4
TILIL	84.0	73.1	9.8	124	8
DBH1STMF	5.8	5.8	8.5	1,461	3
KBPPWBIL	145.0	133.6	7.3	54	5
ACMELAB	84.0	83.0	6.7	80	3
JAMUNABANK	21.6	21.6	6.5	300	1
EASTRNLAB	2,600.0	2,600.0	5.4	2	1
PRAGATILIF	187.0	186.0	4.5	24	2
BDLAMPS	175.0	175.0	3.8	22	1
EXIM1STMF	4.4	4.4	3.4	772	2
MARICO	2,925.0	2,925.0	2.9	1	2
EIL	37.8	37.8	2.5	66	2
BPML	42.3	42.3	2.4	58	1
ANLIMAYARN	21.0	21.0	2.3	110	2
NLTUBES	85.6	77.5	1.8	22	2
GQBALLPEN	397.0	397.0	1.7	4	1
RUPALIINS	28.2	28.2	1.5	53	1
BEACONPHAR	132.5	132.5	1.3	10	1
Total			208.1		64

Important DSE News
MJLBD

The company has informed that Omera Petroleum Limited, a subsidiary of MJL Bangladesh PLC, has entered into an agreement to acquire 99.995% shares of Premier LP Gas Limited (PLPG), a leading LPG operator in Bangladesh under the brand name "Totalgaz Bangladesh". The consideration value of the proposed acquisition is BDT 227 crore, subject to necessary regulatory approvals. The proposed acquisition is expected to strengthen Omera's LPG operations by utilizing PLPG's existing infrastructure and 1.6 million LPG cylinders, which in turn is anticipated to boost revenue and enhance profitability in the LPG business.

BANKASIA

Mr. Sohail Reza Khaled Hussain, Managing Director of the company, has expressed his intention to buy 100,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

ISLAMIBANK

Mr. M. Zubaidur Rahman, an Independent Director of the company, has further informed that he has completed his sale of 149,622 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated by DSE on 03.09.2025.

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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