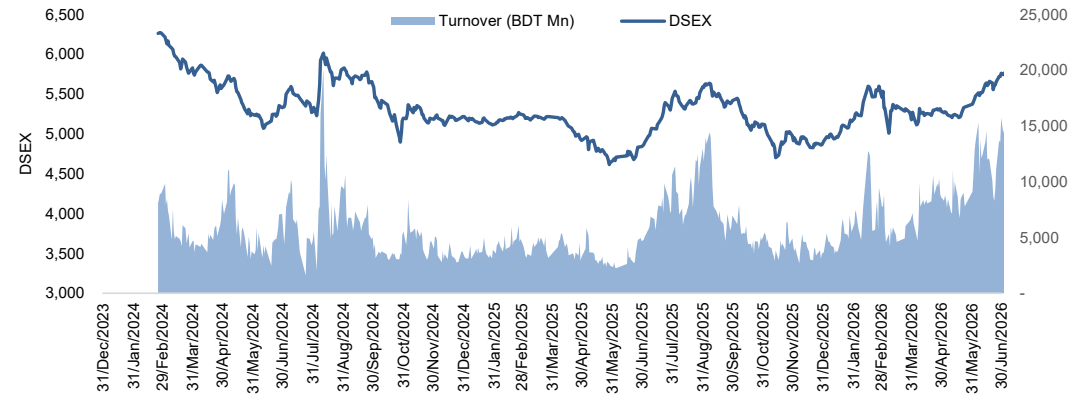


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.50%) lost 28.1 points and closed at 5,539.32. The blue-chip index DS30 (-0.27%), the Shariah-based index DSES (-0.45%), and the large-cap index CDSET (-0.27%) closed at 2,108.27, 1,109.80, and 1,109.87 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.47% followed by Telecommunication (-0.41%), Engineering (-0.40%), Food & Allied (-0.32%), Pharmaceutical (-0.30%), Bank (-0.26%), and NBFI (-0.22%), respectively. Block trades contributed 3.3% of the overall market turnover. Envoy Textiles Limited (+5.1%) was the most traded share with a turnover of BDT 276 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,539.32	5,567.42	-28.10	-0.50%	+13.9%
DS30	2,108.27	2,113.92	-5.65	-0.27%	+13.7%
DSES	1,109.80	1,114.80	-5.00	-0.45%	+10.9%
CDSET	1,109.87	1,112.88	-3.01	-0.27%	+10.5%

	Advanced	Declined	Unchanged	Total
All Category	84	252	60	396
A Category (Equity)	40	138	26	204
B Category (Equity)	8	65	1	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	36	49	33	118
Mutual Funds	5	16	13	34
Corporate Bonds	1	0	1	2
Treasury Bonds	3	7	0	10

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,911,304	6,915,221	-0.1%
	Mn USD	56,252	56,284	
Turnover	Mn BDT	5,904	5,713	+3.3%
	Mn USD	48	47	
Volume	Mn Shares	191	200	-4.5%
No. of Trade		168,534	185,987	-9.4%

* Average Interbank Exchange Rate is BDT 122.86 as of Sep 08, 2026

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Figure: Sectorial Turnover (BDT Mn)

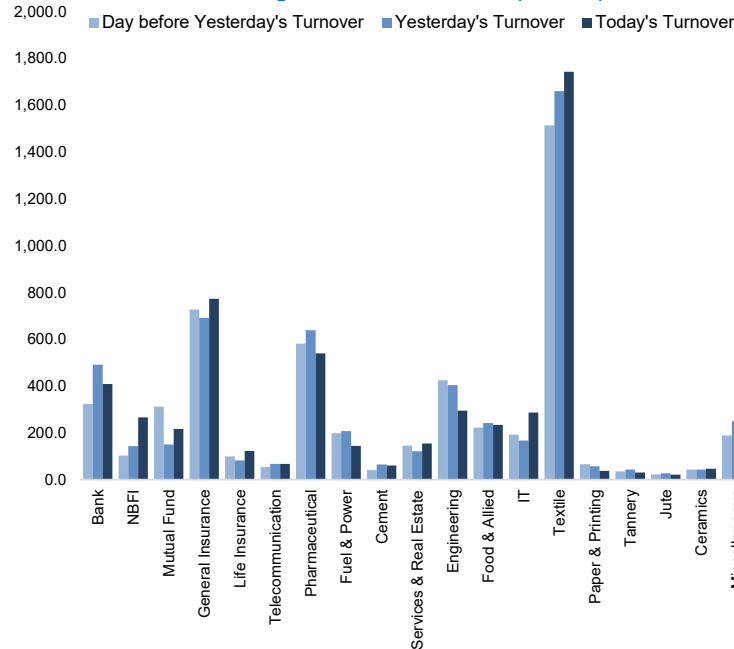
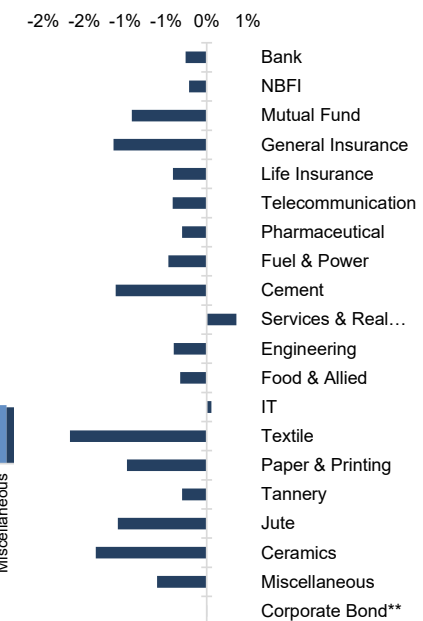


Figure: Sectorial Mcap Change



Market PE 13.0x

Market PB 1.6x

* Market P/E and P/BV calculation excludes
Mutual Fund, Life Insurance, selected NBFIs and Banks

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	1,550	-4.02	-0.26%	36	736,668	10.7%	407.8	7.1%	7.2x	0.7x	GP	324,882	9.3%	33.2	9.2x	5.8x
NBFI	1,096	1,098	-2.37	-0.22%	23	104,217	1.5%	265.5	4.7%	NM	1.1x	SQURPHARMA	191,119	5.5%	50.9	7.4x	1.3x
Mutual Fund	628	634	-5.81	-0.92%	34	29,216	0.4%	216.5	3.8%	NM	0.6x	ROBI	156,090	4.5%	29.9	14.9x	2.4x
General Insurance	4,282	4,331	-49.34	-1.14%	43	120,976	1.7%	772.9	13.5%	17.8x	1.7x	BRACBANK	142,640	4.1%	96.4	6.3x	1.3x
Life Insurance	1,735	1,743	-7.21	-0.41%	15	48,920	0.7%	122.8	2.2%	NM	NM	WALTONHIL	129,590	3.7%	16.1	11.5x	1.0x
Telecommunication	4,382	4,401	-18.26	-0.41%	3	508,523	7.4%	67.6	1.2%	10.5x	3.6x	BATBC	124,416	3.6%	13.5	21.4x	2.2x
Pharmaceutical	3,087	3,096	-9.32	-0.30%	34	582,728	8.4%	538.8	9.4%	10.6x	1.5x	MARICO	84,489	2.4%	3.4	7.5x	18.4x
Fuel & Power	1,090	1,095	-5.13	-0.47%	23	287,638	4.2%	143.9	2.5%	9.3x	0.6x	BERGERPBL	72,809	2.1%	11.0	15.6x	3.4x
Cement	1,957	1,979	-22.02	-1.11%	7	92,050	1.3%	60.3	1.1%	21.4x	2.1x	BXPHARMA	67,184	1.9%	174.2	7.8x	1.1x
Services & Real Estate	1,150	1,146	+4.16	+0.36%	9	62,598	0.9%	154.7	2.7%	25.5x	0.5x	UPGDCL	64,984	1.9%	3.6	7.0x	1.4x
Engineering	2,603	2,614	-10.56	-0.40%	42	291,782	4.2%	294.5	5.2%	15.4x	0.8x	PUBALIBANK	59,814	1.7%	13.5	5.0x	0.8x
Food & Allied	12,390	12,430	-40.22	-0.32%	21	226,179	3.3%	234.2	4.1%	33.1x	3.3x	RENATA	52,875	1.5%	5.2	19.4x	1.4x
IT	2,432	2,430	+1.42	+0.06%	11	32,202	0.5%	286.3	5.0%	48.0x	2.0x	CITYBANK	52,482	1.5%	36.9	3.4x	0.8x
Textile	1,371	1,394	-23.31	-1.67%	58	142,556	2.1%	1,741.9	30.5%	NM	1.0x	ISLAMIBANK	44,275	1.3%	1.9	NM	0.8x
Paper & Printing	4,375	4,418	-43.07	-0.97%	6	20,492	0.3%	37.6	0.7%	NM	1.4x	DUTCHBANGL	44,256	1.3%	8.7	3.4x	0.7x
Tannery	2,111	2,118	-6.38	-0.30%	6	24,519	0.4%	30.9	0.5%	NM	1.5x	EBL	38,955	1.1%	11.2	4.3x	0.8x
Jute	12,875	13,017	-141.57	-1.09%	3	2,808	0.0%	21.1	0.4%	NM	1.8x	UNILEVERCL	38,325	1.1%	0.3	62.6x	23.5x
Ceramics	457	463	-6.29	-1.36%	5	20,649	0.3%	46.9	0.8%	NM	1.4x	ICB	35,037	1.0%	2.1	NM	1.3x
Miscellaneous	2,473	2,489	-15.10	-0.61%	15	134,313	1.9%	240.3	4.2%	38.5x	1.0x	PRIMEBANK	34,974	1.0%	7.0	3.8x	0.7x
Corporate Bond**	18,197	18,197	+0.68	+0.00%	16	40,260	0.6%	1.6	0.0%	NM	NM	POWERGRID	34,816	1.0%	1.8	8.6x	0.3x
Treasury Bond**	2,217	2,210	+7.60	+0.34%	232	3,406,113	49.3%	22.7	0.4%	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
SUNLIFEINS	50.4	+6.3%	36.7	NM	NM	SQURPHARMA	106,740	7.2%	7.4x	1.3x	ENVOYTEX	70.1	+5.1%	276.3	8.5x	1.1x
MEGHNACEM	30.8	+6.2%	0.2	NM	NM	BRACBANK	76,783	5.2%	6.3x	1.3x	MALEKSPIN	45.9	-7.3%	250.9	8.1x	0.7x
GQBALLPEN	584.8	+5.4%	76.3	NM	4.2x	BXPHARMA	46,942	3.2%	7.8x	1.1x	SHARPIND	18.9	-6.9%	228.7	NM	2.4x
NTC	157.3	+5.3%	0.3	NM	NM	ISLAMIBANK	44,195	3.0%	NM	0.8x	IPDC	32.0	+2.6%	218.1	26.9x	1.9x
ENVOYTEX	70.1	+5.1%	276.3	8.5x	1.1x	WALTONHIL	42,648	2.9%	11.5x	1.0x	SAIHAMCOT	22.7	-6.6%	188.7	24.9x	0.6x
MEGHNAPET	65.7	+3.63%	3.3	NM	0.9x	PUBALIBANK	40,751	2.8%	5.0x	0.8x	BXPHARMA	150.6	+0.4%	174.2	7.8x	1.1x
STANCERAM	68.9	+3.6%	0.1	NM	NM	CITYBANK	36,543	2.5%	3.4x	0.8x	SAIHAMTEX	28.7	-9.7%	121.9	46.3x	0.7x
PRIMEFIN	3.0	+3.4%	1.1	NM	NM	BATBC	32,908	2.2%	21.4x	2.2x	DAFODILCOM	165.4	+1.0%	119.5	NM	12.6x
NURANI	3.1	+3.3%	1.0	NM	0.3x	GP	32,488	2.2%	9.2x	5.8x	RELIANCINS	103.1	+0.6%	103.6	10.8x	1.2x
HWAWELLTEX	48.2	+3.2%	54.8	14.4x	1.2x	EBL	26,708	1.8%	4.3x	0.8x	BNICL	114.7	+1.2%	99.9	19.9x	3.3x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,755	1.7%	19.4x	1.4x						
SAIHAMTEX	28.7	-9.7%	121.9	46.3x	0.7x	LHB	22,152	1.5%	12.3x	3.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RELIANCE1	11.3	-7.4%	20.0	NM	1x	PRIMEBANK	21,849	1.5%	3.8x	0.7x	GP	239.0	239.0	18.0	243	58.15
MALEKSPIN	45.9	-6.9%	228.7	NM	2.4x	UCB	18,611	1.3%	3.8x	0.5x	GQBALLPEN	550.1	520.0	17.0	76	41.02
SHARPIND	18.9	-6.9%	228.7	NM	2.4x	OLYMPIC	18,029	1.2%	15.2x	2.2x	ENVOYTEX	69.0	65.0	3.0	425	28.50
SAIHAMCOT	22.7	-6.6%	188.7	24.9x	0.6x	UTTARABANK	17,525	1.2%	NM	0.8x	TRUSTBANK	14.7	14.7	8.0	1,200	17.64
FEKDIL	21.4	-6.1%	52.4	NM	1.1x	ALARABANK	15,643	1.1%	20.5x	0.7x	KARNAPHULI	58.3	53.3	2.0	125	6.77
FARCHEM	14.9	-5.1%	44.5	NM	0.5x	ROBI	15,609	1.1%	14.9x	2.4x	DAFODILCOM	161.0	160.0	5.0	40	6.45
ANLIMAYARN	27.3	-4.9%	0.7	NM	9.6x	BSRMLTD	15,173	1.0%	4.4x	0.5x	UNITEDINS	66.9	66.9	4.0	65	4.36
DSHGARME	154.0	-4.8%	14.1	NM	1.0x	BEACONPHAR	14,420	1.0%	16.5x	3.1x	PTL	83.6	77.0	5.0	50	4.04
PRIMETEX	14.2	-4.7%	1.2	NM	0.2x						MALEKSPIN	51.0	49.0	3.0	61	3.05
											SAIHAMTEX	31.0	31.0	1.0	80	2.48

* Bank and NBFI sector PE calculation methodology has been modified.

** 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	Important DSE News
GP	239.0	239.0	58.1	243	18	
GQBALLPEN	550.1	520.0	41.0	76	17	
ENVOYTEX	69.0	65.0	28.5	425	3	
TRUSTBANK	14.7	14.7	17.6	1,200	8	
KARNAPHULI	58.3	53.3	6.8	125	2	
DAFODILCOM	161.0	160.0	6.5	40	5	
UNITEDINS	66.9	66.9	4.4	65	4	
PTL	83.6	77.0	4.0	50	5	
MALEKSPIN	51.0	49.0	3.0	61	3	
SAIHAMTEX	31.0	31.0	2.5	80	1	
NRBCBANK	8.1	8.1	2.4	300	1	
BNICL	120.0	120.0	2.4	20	1	
MERCINS	45.0	45.0	2.3	50	1	
UTTARABANK	22.8	22.8	2.1	92	4	
RELIANCE1	13.4	13.4	1.9	141	1	
DUTCHBANGL	45.4	45.4	1.4	30	1	
RUNNERAUTO	45.9	45.9	1.2	26	2	
KTL	11.5	11.5	1.2	100	1	
CONTININS	38.1	38.1	1.1	29	2	
TAKAFULINS	55.0	55.0	1.1	20	1	
ATLASBANG	88.5	88.5	0.9	10	1	
FEKDIL	23.9	23.9	0.7	29	1	
Total			195.6		91	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
WALTONHIL		10.0%	180.0%	Record Date	20-Sep-26

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