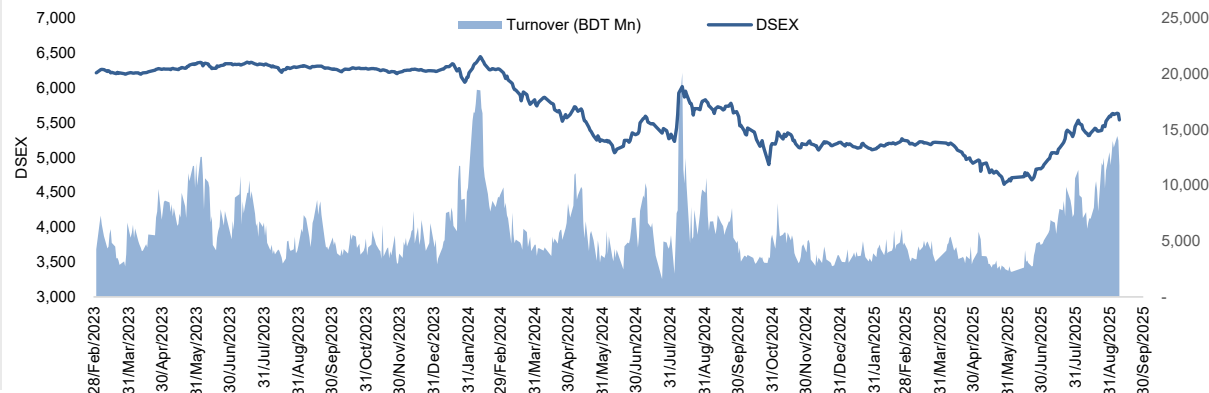


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.59%) lost 89.34 points and closed at 5,538.25. The blue-chip index DS30 (-1.79%), the Shariah-based index DSES (-1.73%), and the large-cap index CDSET (-1.39%) closed at 2,152.83, 1,203.98, and 1,117.82 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 2.13% followed by Bank (-1.68%), Telecommunication (-1.67%), Pharmaceutical (-1.38%), Food & Allied (-1.25%), Fuel & Power (-0.79%), and NBFI (-0.61%), respectively. Block trades contributed 2.0% of the overall market turnover. Orion Infusion Ltd. (-7.5%) was the most traded share with a turnover of BDT 501 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,538.25	5,627.59	-89.34	-1.59%	+6.2%
DS30	2,152.83	2,191.99	-39.16	-1.79%	+11.0%
DSES	1,203.98	1,225.21	-21.23	-1.73%	+3.0%
CDSET	1,117.82	1,133.56	-15.74	-1.39%	+4.9%

	Advanced	Declined	Unchanged	Total
All Category	68	305	28	401
A Category (Equity)	26	184	13	223
B Category (Equity)	13	67	2	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	54	13	96
Mutual Funds	6	21	9	36
Corporate Bonds	2	1	0	3
Treasury Bonds	1	3	0	4

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,260,942	7,310,534	-0.7%
	Mn USD	59,636	60,043	
Turnover	Mn BDT	11,773	14,008	-16.0%
	Mn USD	97	115	
Volume	Mn Shares	377	475	-20.6%
	No. of Trade	306,034	347,061	-11.8%

\* Average Interbank Exchange Rate is BDT 121.75 as of Sep 09, 2025

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Figure: Sectorial Turnover (BDT Mn)

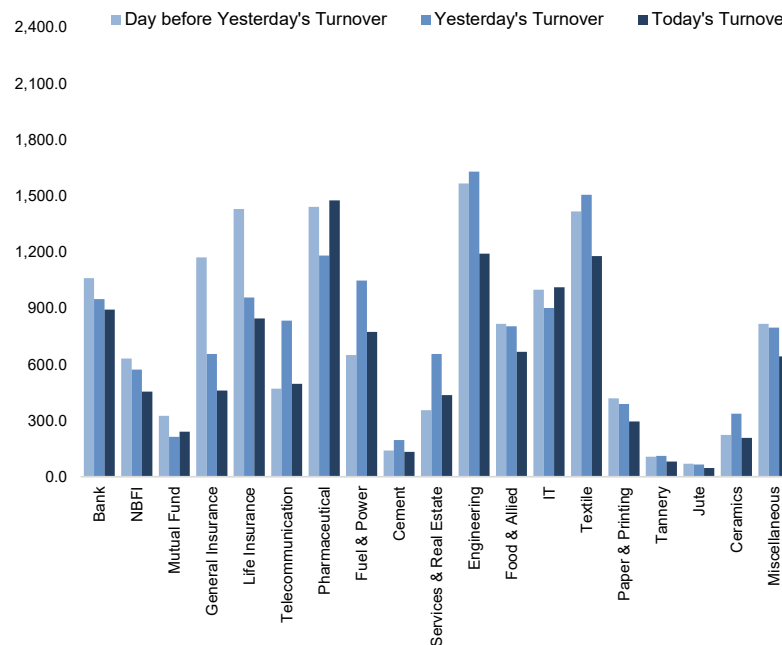
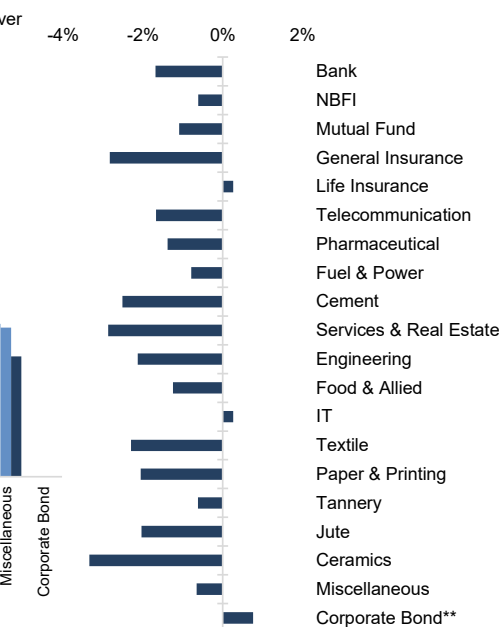


Figure: Sectorial Mcap Change



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	1,507	1,533	-25.83	-1.68%	36	713,211	9.8%	892.9	7.7%	NM	0.8x	GP	406,170	10.9%	44.1	13.8x	7.1x
NBFI	1,193	1,201	-7.34	-0.61%	23	113,711	1.6%	453.8	3.9%	NM	NM	SQURPHARMA	194,399	5.2%	103.1	8.3x	1.4x
Mutual Fund	577	584	-6.38	-1.09%	37	27,673	0.4%	240.0	2.1%	NM	0.5x	ROBI	166,042	4.5%	392.4	19.1x	2.6x
General Insurance	3,001	3,088	-87.30	-2.83%	43	85,642	1.2%	460.2	4.0%	14.4x	1.3x	BATBC	156,006	4.2%	43.2	12.6x	2.9x
Life Insurance	2,243	2,237	+5.94	+0.27%	15	59,648	0.8%	845.5	7.3%	NM	NM	BRACBANK	145,338	3.9%	127.7	10.3x	1.7x
Telecommunication	5,113	5,200	-86.79	-1.67%	3	599,539	8.3%	495.9	4.3%	15.2x	4.4x	WALTONHIL	140,498	3.8%	49.0	13.6x	1.2x
Pharmaceutical	3,154	3,198	-44.17	-1.38%	34	597,925	8.3%	1,475.3	12.8%	13.7x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,201	1,210	-9.53	-0.79%	23	318,027	4.4%	773.5	6.7%	20.1x	0.7x	MARICO	91,350	2.5%	4.6	14.9x	27.4x
Cement	2,099	2,153	-54.02	-2.51%	7	100,016	1.4%	132.5	1.1%	23.0x	2.2x	UPGDCL	83,998	2.3%	9.6	7.2x	2.0x
Services & Real Estate	1,129	1,162	-33.37	-2.87%	9	62,088	0.9%	435.6	3.8%	28.6x	0.5x	BERGERPBL	72,186	1.9%	20.0	20.5x	4.2x
Engineering	2,630	2,687	-57.14	-2.13%	42	296,709	4.1%	1,191.2	10.3%	15.9x	0.9x	ISLAMIBANK	64,883	1.7%	22.7	NM	0.9x
Food & Allied	15,038	15,228	-190.01	-1.25%	21	275,151	3.8%	666.2	5.8%	20.8x	4.4x	RENATA	57,279	1.5%	46.6	20.4x	1.7x
IT	2,228	2,222	+5.78	+0.26%	11	29,385	0.4%	1,011.0	8.8%	24.7x	1.9x	BXPHARMA	56,121	1.5%	81.1	8.8x	1.1x
Textile	1,235	1,264	-29.05	-2.30%	58	128,577	1.8%	1,178.3	10.2%	NM	0.9x	ICB	50,735	1.4%	64.7	NM	1.2x
Paper & Printing	5,577	5,694	-116.96	-2.05%	6	25,194	0.3%	295.3	2.6%	NM	1.2x	UNILEVERCL	47,525	1.3%	0.1	74.8x	26.1x
Tannery	2,142	2,155	-13.34	-0.62%	6	23,867	0.3%	81.6	0.7%	NM	1.8x	EBL	40,534	1.1%	34.3	5.8x	0.9x
Jute	13,997	14,287	-290.53	-2.03%	3	3,081	0.0%	46.1	0.4%	NM	NM	DUTCHBANGL	40,118	1.1%	9.2	10.7x	0.8x
Ceramics	447	463	-15.45	-3.34%	5	20,067	0.3%	206.8	1.8%	NM	1.3x	CITYBANK	39,704	1.1%	217.6	3.7x	0.7x
Miscellaneous	4,192	4,219	-27.64	-0.66%	15	227,629	3.1%	642.5	5.6%	90.2x	1.8x	PUBALIBANK	37,872	1.0%	13.0	5.2x	0.7x
Corporate Bond**	16,486	16,361	+124.78	+0.76%	16	36,397	0.5%	3.1	0.0%	NM	NM	PRIMEBANK	33,077	0.9%	31.8	3.9x	0.8x
Treasury Bond**	2,270	2,265	+5.56	+0.25%	235	3,499,384	48.3%	15.4	0.1%	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
TALLUSPIN	6.6	+10.0%	10.2	NM	0.4x	SQURPHARMA	108,958	7.7%	8.3x	1.4x	ORIONINFU	505.7	-7.5%	501.3	NM	32.2x
ISNLTD	119.2	+10.0%	133.9	NM	43.3x	ISLAMIBANK	74,730	5.3%	NM	0.9x	ROBI	31.7	-2.2%	392.4	19.1x	2.6x
INTECH	44.1	+9.7%	153.1	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	KBPWBIL	147.8	-2.6%	275.4	NM	12.4x
CAPMBDBLMF	11.9	+9.2%	35.3	NM	1.4x	BATBC	50,233	3.6%	12.6x	2.9x	CITYBANK	26.1	-2.6%	217.6	3.7x	0.7x
PLFSL	1.3	+8.3%	0.6	NM	NM	WALTONHIL	46,773	3.3%	13.6x	1.2x	EGEN	32.2	+6.3%	206.3	40.3x	1.4x
PRIMEFIN	2.8	+7.69%	4.4	NM	0.4x	BRACBANK	46,489	3.3%	10.3x	1.7x	MJLBD	104.3	+1.8%	202.9	10.2x	2.1x
PRAGATILIF	208.9	+6.9%	110.7	NM	NM	GP	44,708	3.2%	13.8x	7.1x	TILIL	75.3	+3.0%	197.2	11.9x	NM
TAMIJTEX	142.2	+6.7%	26.2	21.0x	1.4x	RENATA	32,968	2.3%	20.4x	1.7x	RUPALILIFE	123.0	+4.8%	182.5	NM	NM
FASFIN	1.6	+6.7%	1.1	NM	NM	BXPHARMA	23,409	1.7%	8.8x	1.1x	ITC	45.4	-0.7%	168.6	12.2x	2.0x
CNATEX	3.3	+6.5%	8.8	NM	NM	PUBALIBANK	22,905	1.6%	5.2x	0.7x	MALEKSPIN	33.3	-3.5%	160.8	4.5x	0.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.7x	0.7x						
ORIONINFU	505.7	-7.5%	501.3	NM	32.2x	LHB	20,953	1.5%	17.3x	3.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FIRSTFIN	2.7	-6.9%	0.1	NM	NM	OLYMPIC	20,496	1.5%	17.6x	2.7x	PRIMEBANK	26.6	26.6	1.0	2,250	59.85
ARAMITCEM	12.7	-6.6%	1.1	NM	NM	ALARABANK	18,282	1.3%	36.9x	0.8x	MARICO	2,905.0	2,905.0	4.0	10	28.59
SAFKOSPINN	14.3	-6.5%	7.3	NM	NM	BEACONPHAR	17,838	1.3%	33.6x	4.5x	CAPMBDBLMF	10.7	9.9	18.0	2,550	26.61
NAHEEACP	24.5	-6.5%	38.7	90.7x	1.3x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	FINEFOODS	290.2	285.0	5.0	46	13.31
ZAHINTEX	6.1	-6.2%	0.6	NM	0.8x	ROBI	14,876	1.1%	19.1x	2.6x	LOVELLO	117.0	96.0	3.0	115	11.13
ORIONPHARM	37.6	-6.0%	60.8	NM	0.4x	UTTARABANK	13,699	1.0%	NM	0.8x	SONALILIFE	85.8	85.8	2.0	111	9.52
WMSHIPYARD	9.4	-6.0%	9.9	NM	0.6x	NBL	13,055	0.9%	NM	NM	SUNLIFEINS	64.0	64.0	1.0	132	8.45
EBLNBRMF	3.2	-5.9%	8.1	NM	0.3x	BSRMLTD	12,852	0.9%	5.1x	0.5x	PTL	61.8	59.6	4.0	138	8.27
GHAIL	13.7	-5.5%	29.9	NM	1.1x						ACMELAB	87.0	87.0	3.0	95	8.26
											ISNLTD	112.5	108.1	6.0	68	7.39

\* 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
PRIMEBANK	26.6	26.6	59.9	2,250	1
MARICO	2,905.0	2,905.0	28.6	10	4
CAPMBDBLMF	10.7	9.9	26.6	2,550	18
FINEFOODS	290.2	285.0	13.3	46	5
LOVELLO	117.0	96.0	11.1	115	3
SONALILIFE	85.8	85.8	9.5	111	2
SUNLIFEINS	64.0	64.0	8.4	132	1
PTL	61.8	59.6	8.3	138	4
ACMELAB	87.0	87.0	8.3	95	3
ISNLTD	112.5	108.1	7.4	68	6
KBPPWBIL	137.0	137.0	6.6	49	2
GP	301.0	301.0	6.0	20	1
SIMTEX	21.4	20.5	4.8	226	5
PIONEERINS	52.8	52.8	4.7	88	1
CLICL	63.0	62.0	4.4	70	2
WALTONHIL	470.0	470.0	3.2	7	1
PRAGATILIF	214.0	185.4	3.2	16	4
ORIONINFU	549.1	505.7	2.9	6	4
BEACONPHAR	127.0	120.0	2.0	16	2
JAMUNABANK	22.2	22.2	1.5	68	1
CITYGENINS	59.8	58.5	1.4	24	2
AL-HAJTEX	155.0	155.0	1.2	8	1
<b>Total</b>			<b>229.9</b>		<b>83</b>

**Important DSE News**
**PREMIERBAN**

The company has informed that in exercise of the powers conferred under Sections 47(1)(a) and 48(1) of the Bank Company Act, 1991 (as amended up to 2023), Bangladesh Bank, through Order dated August 19, 2025, has dissolved the existing Board of Directors of The Premier Bank PLC. with immediate effect. Bangladesh Bank, through its letter dated August 19, 2025 has formed the Board of Directors of The Premier Bank PLC. Subsequently, in the 314th meeting of Board of Directors held on August 21, 2025, Dr. Arifur Rahman has been unanimously elected as the Chairman of the Board.

**NRBCBANK**

Mr. Syed Munsif Ali, a Sponsor of the Company, has expressed his intention to sell 30,00,000 shares out of his holding of 1,13,54,645 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 (thirty) working days.

**PIONEERINS**

Mr. Alamgir Shamsul Alamin, a Director of the company, has expressed his intention to transfer 1,915,000 shares of the company to his brother Mr. Jahangir Alamin (a General Shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days with effect from September 08, 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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