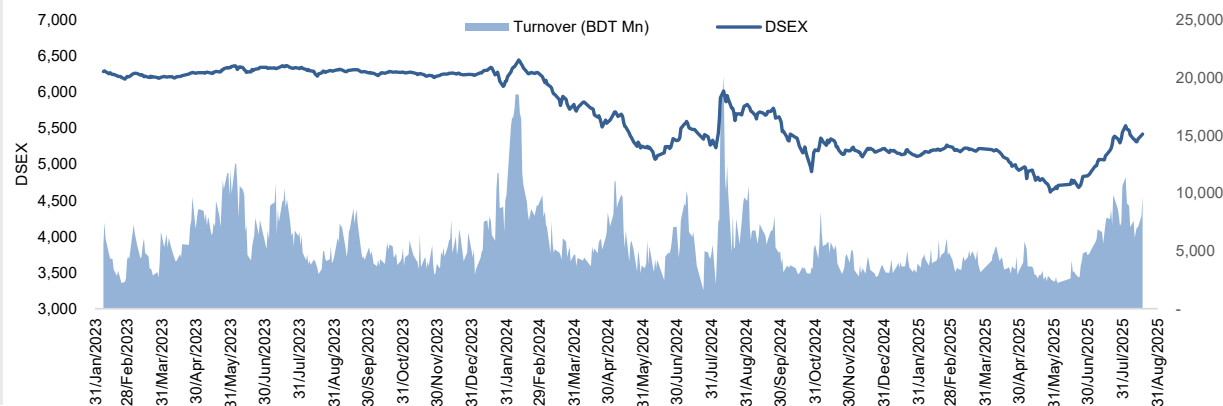


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.34%) gained 18.42 points and closed at 5,419.91. The blue-chip index DS30 (+0.28%), the Shariah-based index DSES (+1.02%), and the large-cap index CDSET (-0.07%) closed at 2,101.84, 1,184.53, and 1,110.08 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 2.00% followed by Pharmaceutical (+1.18%), NBFI (+0.92%), Fuel & Power (+0.62%), Food & Allied (+0.56%), Telecommunication (+0.25%), and Bank (-1.39%), respectively. Block trades contributed 1.4% of the overall market turnover. Bangladesh Shipping Corporation (+1.6%) was the most traded share with a turnover of BDT 311 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,419.91	5,401.49	+18.42	+0.34%	+3.9%
DS30	2,101.84	2,095.95	+5.89	+0.28%	+8.4%
DSES	1,184.53	1,172.58	+11.96	+1.02%	+1.3%
CDSET	1,110.08	1,110.82	-0.74	-0.07%	+4.1%

	Advanced	Declined	Unchanged	Total
All Category	242	94	64	400
A Category (Equity)	131	62	28	221
B Category (Equity)	60	18	5	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	51	14	31	96
Mutual Funds	11	7	18	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	4	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,165,790	7,150,436	+0.2%
	Mn USD	58,978	58,851	
Turnover	Mn BDT	9,759	8,017	+21.7%
	Mn USD	80	66	
Volume	Mn Shares	299	251	+19.0%
No. of Trade		266,930	221,135	+20.7%

* Average Interbank Exchange Rate is BDT 121.50 as of Aug 18, 2025

Figure: Sectorial Turnover (BDT Mn)

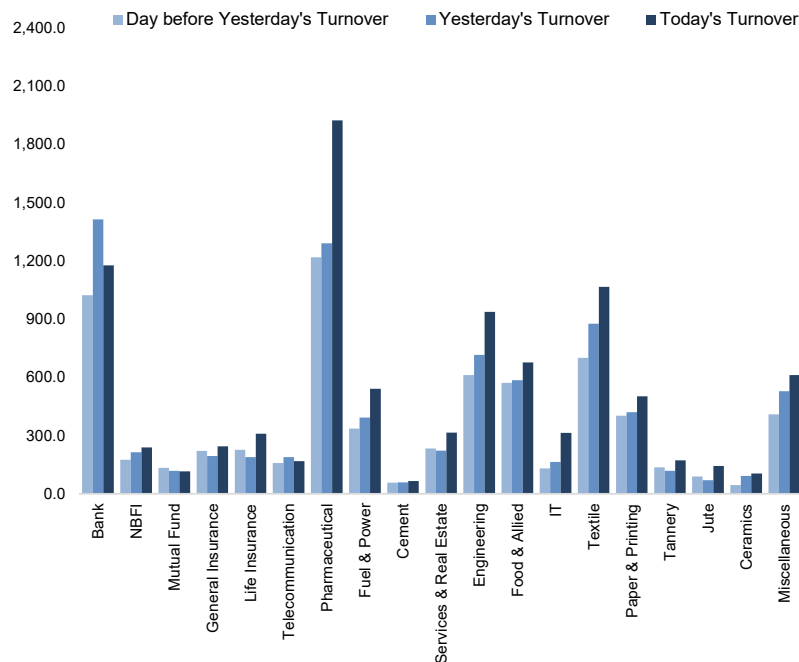
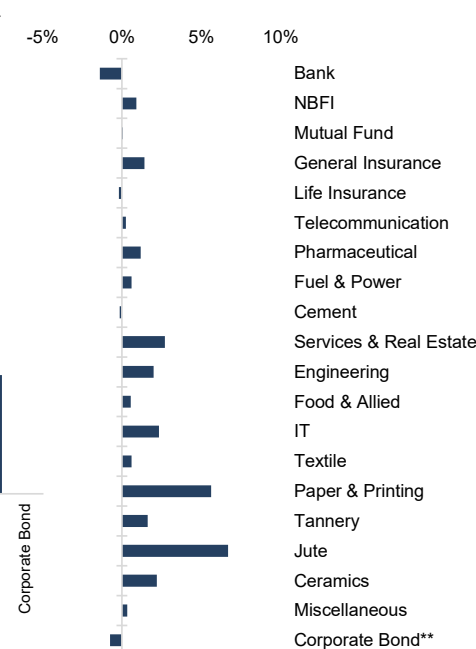


Figure: Sectorial Mcap Change



Market PE 15.4x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK, GIB and NBL

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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	1,561	-21.72	-1.39%	36	728,401	10.2%	1,175.4	12.2%	NM	0.8x	GP	411,842	11.2%	34.0	14.0x	7.2x
NBFI	1,117	1,107	+10.16	+0.92%	23	106,452	1.5%	238.2	2.5%	NM	NM	SQURPHARMA	199,008	5.4%	82.5	8.5x	1.5x
Mutual Fund	573	573	+0.33	+0.06%	37	27,470	0.4%	114.9	1.2%	NM	0.5x	BATBC	156,384	4.3%	55.7	12.6x	2.9x
General Insurance	2,704	2,666	+37.95	+1.42%	43	77,158	1.1%	244.9	2.5%	13.0x	1.2x	ROBI	145,091	4.0%	80.9	16.7x	2.3x
Life Insurance	1,819	1,823	-3.37	-0.18%	15	48,386	0.7%	309.7	3.2%	NM	NM	WALTONHIL	137,984	3.8%	14.6	10.7x	1.2x
Telecommunication	4,992	4,979	+12.38	+0.25%	3	585,325	8.2%	168.4	1.8%	14.8x	4.3x	BRACBANK	135,383	3.7%	70.5	9.6x	1.6x
Pharmaceutical	3,156	3,119	+36.83	+1.18%	34	598,352	8.3%	1,921.7	20.0%	13.7x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,176	1,169	+7.19	+0.62%	23	311,573	4.3%	540.7	5.6%	19.7x	0.7x	MARICO	92,336	2.5%	23.5	15.1x	27.7x
Cement	2,079	2,082	-3.04	-0.15%	7	99,059	1.4%	66.1	0.7%	22.8x	2.2x	UPGDCL	81,563	2.2%	12.4	7.0x	1.9x
Services & Real Estate	1,025	998	+27.13	+2.72%	9	56,379	0.8%	315.3	3.3%	25.9x	0.4x	BERGERPBL	76,694	2.1%	3.9	21.8x	4.4x
Engineering	2,544	2,494	+49.87	+2.00%	42	286,993	4.0%	936.4	9.7%	13.5x	0.9x	LHB	65,618	1.8%	32.0	17.5x	3.5x
Food & Allied	15,069	14,985	+83.59	+0.56%	21	275,723	3.8%	675.7	7.0%	20.9x	4.4x	RENATA	57,062	1.6%	29.0	20.3x	1.6x
IT	1,876	1,833	+42.98	+2.35%	11	24,742	0.3%	313.2	3.3%	20.8x	1.6x	BXPHERMA	55,184	1.5%	252.3	8.6x	1.1x
Textile	1,149	1,142	+6.96	+0.61%	58	119,707	1.7%	1,064.7	11.1%	NM	0.8x	UNILEVERCL	48,467	1.3%	1.4	76.3x	26.6x
Paper & Printing	5,067	4,797	+269.96	+5.63%	6	22,893	0.3%	501.4	5.2%	NM	1.1x	ICB	46,138	1.3%	55.2	NM	1.1x
Tannery	2,129	2,095	+33.93	+1.62%	6	23,718	0.3%	172.5	1.8%	NM	1.8x	DUTCHBANGL	41,761	1.1%	9.9	11.1x	0.8x
Jute	14,147	13,259	+888.13	+6.70%	3	3,114	0.0%	142.6	1.5%	NM	NM	EBL	40,374	1.1%	15.1	5.8x	0.9x
Ceramics	407	398	+8.79	+2.21%	5	18,258	0.3%	103.9	1.1%	NM	1.2x	PUBALIBANK	39,043	1.1%	37.9	5.3x	0.7x
Miscellaneous	4,190	4,176	+13.93	+0.33%	15	227,545	3.2%	610.6	6.3%	90.1x	1.8x	CITYBANK	37,422	1.0%	291.6	3.4x	0.7x
Corporate Bond**	16,973	17,101	-128.18	-0.75%	16	37,471	0.5%	2.0	0.0%	NM	NM	OLYMPIC	33,490	0.9%	52.2	18.1x	2.8x
Treasury Bond**	2,234	2,230	+3.59	+0.16%	235	3,493,823	48.7%	1.7	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
NTC	193.8	+10.0%	9.0	NM	NM	SQURPHARMA	108,958	7.7%	8.5x	1.5x	BSC	120.4	+1.6%	311.4	6.1x	1.2x
SONALIPAPR	206.2	+10.0%	121.2	20.0x	1.2x	ISLAMIBANK	74,730	5.3%	15.6x	1.0x	CITYBANK	24.6	-1.6%	291.6	3.4x	0.7x
ACIFORMULA	152.5	+9.9%	41.5	16.7x	2.0x	BEXIMCO	69,463	4.9%	NM	1.3x	BXPHARMA	123.7	+3.0%	252.3	8.6x	1.1x
BDAUTOCA	132.9	+9.9%	45.8	NM	18.0x	BATBC	50,233	3.6%	12.6x	2.9x	ORIONINFU	502.2	+4.5%	240.0	NM	32.0x
ISNLTD	54.6	+9.9%	82.1	NM	19.9x	WALTONHIL	46,773	3.3%	10.7x	1.2x	TECHNODRUG	34.6	+9.8%	190.7	NM	1.1x
TECHNODRUG	34.6	+9.84%	190.7	NM	1.1x	BRACBANK	46,489	3.3%	9.6x	1.6x	JAMUNABANK	21.3	-0.5%	182.8	7.4x	0.9x
USMANIAGL	38.0	+9.8%	2.3	NM	1x	GP	44,708	3.2%	14.0x	7.2x	MALEKSPIN	31.1	-	173.9	4.2x	0.5x
SONALIANSH	227.8	+8.7%	139.5	NM	3.4x	RENATA	32,968	2.3%	20.3x	1.6x	ACMEPL	16.7	+4.4%	153.1	NM	1.0x
INTECH	22.7	+8.6%	34.3	NM	NM	BXPHARMA	23,409	1.7%	8.6x	1.1x	MAGURAPLEX	104.3	+4.8%	147.9	30.4x	1.4x
JHRML	57.3	+7.5%	96.6	26.4x	1.6x	PUBALIBANK	22,905	1.6%	5.3x	0.7x	ASIATICLAB	52.4	+0.4%	146.2	21.7x	1.0x
						CITYBANK	21,020	1.5%	3.4x	0.7x						
						LHB	20,953	1.5%	17.5x	3.5x						
						OLYMPIC	20,496	1.5%	18.1x	2.8x						
						ALARABANK	18,282	1.3%	37.7x	0.8x						
						BEACONPHAR	17,838	1.3%	30.8x	4.1x						
						PRIMEBANK	16,142	1.1%	3.9x	0.8x						
						ROBI	14,876	1.1%	16.7x	2.3x						
						UTTARABANK	13,699	1.0%	NM	0.8x						
						NBL	13,055	0.9%	NM	NM						
						BSRMLTD	12,852	0.9%	5.1x	0.6x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ICBPMF1S1	4.9	-5.8%	0.3	NM	0.9x						PUBALIBANK	29.4	29.4	2.0	1,000	29.40
FIRSTSBANK	3.5	-5.4%	11.5	NM	1x						FINEFOODS	267.0	255.0	4.0	48	12.59
UNIONCAP	4.2	-4.5%	1.1	NM	NM						AL-HAJTEX	146.4	135.0	5.0	59	8.48
MERCANBANK	9.2	-4.2%	32.7	21.9x	0.4x						EXIM1STMF	4.8	4.4	5.0	1,536	6.93
TILIL	56.2	-3.9%	115.1	10.3x	NM						ORIONINFU	480.2	457.2	6.0	15	6.92
RAHIMTEXT	193.7	-3.9%	35.3	NM	7.6x						LOVELLO	84.0	84.0	1.0	70	5.88
PREMIERLEA	2.7	-3.6%	0.0	NM	NM						ASIATICLAB	52.3	52.0	4.0	100	5.22
PHARMAID	641.5	-3.5%	53.9	37.7x	4.8x						DULAMIACOT	102.1	100.2	3.0	47	4.83
FIRSTFIN	2.9	-3.3%	0.2	NM	NM						DOMINAGE	15.0	14.8	3.0	300	4.48
BANKASIA	18.5	-3.1%	35.4	10.2x	0.7x						JAMUNABANK	21.2	21.0	2.0	200	4.22

* 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
PUBALIBANK	29.4	29.4	29.4	1,000	2
FINEFOODS	267.0	255.0	12.6	48	4
AL-HAJTEX	146.4	135.0	8.5	59	5
EXIM1STMF	4.8	4.4	6.9	1,536	5
ORIONINFU	480.2	457.2	6.9	15	6
LOVELLO	84.0	84.0	5.9	70	1
ASIATICLAB	52.3	52.0	5.2	100	4
DULAMACOT	102.1	100.2	4.8	47	3
DOMINAGE	15.0	14.8	4.5	300	3
JAMUNABANK	21.2	21.0	4.2	200	2
GQBALLPEN	290.0	290.0	4.1	14	1
RELIANCE1	15.7	15.0	4.0	265	5
BEXIMCO	99.5	99.4	4.0	40	8
MEGHNALIFE	62.0	62.0	4.0	64	1
ISNLTD	53.0	51.0	3.7	70	4
MJLBD	90.0	90.0	2.2	24	1
AMANFEED	24.6	24.6	2.2	88	1
SUNLIFEINS	52.0	52.0	2.0	39	1
STANDBANKL	7.1	7.1	1.9	270	1
PTL	48.2	47.2	1.7	35	3
KBPPWBIL	120.0	109.0	1.6	14	2
RAHIMAFOOD	170.0	166.0	1.6	9	2
Total			138.8		87

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PRAGATILIF		0.0%	15.0%	Record Date	19-Aug-25
MARICO		0.0%	600.0%	Record Date	21-Aug-25
CAPITECGBF		0.0%	3.3%	Record Date	24-Aug-25
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-25
GRAMEENS2		0.0%	7.5%	Record Date	3-Sep-25
RELIANCE1		0.0%	0.0%	Record Date	4-Sep-25
SEMLLECMF		0.0%	0.0%	Record Date	4-Sep-25
SEMLFBSLGF		0.0%	0.0%	Record Date	4-Sep-25
PREMIERLEA		0.0%	0.0%	Record Date	4-Sep-25

Important DSE News
TILIL

The Board of Directors has recommended 5% Cash Dividend for the year ended December 31, 2024 to all the general shareholders other than sponsors and directors. Sponsors and Directors hold 2,40,00,000 shares, and general shareholders hold 1,60,00,000 (IPO) shares of the company. Taka 80,00,000.00 only shall be distributed amongst the general shareholders. Date of AGM: 30.09.2025. Venue: Will be notified later. Record Date: 04.09.2025. The Company has also reported EPS of Tk. 0.20, NAV per share of Tk. 12.13 and NOCFPS of Tk. 1.61 for the period ended December 31, 2024 as against Tk. 0.21, Tk. 11.37 and Tk. 2.07 respectively for the year ended December 31, 2023.

(Q1 Un-audited): As per Life Revenue Account for the period ended March 31, 2025, Net Premium was Tk. 92,607,369 for Jan-Mar 2025 as against Tk. 91,320,305 for Jan-Mar 2024. Balance of Life Revenue Fund was Tk. 374,424,371 as on March 31, 2025 and Tk. 296,513,190 as on March 31, 2024.

(Q2 Un-audited): As per Life Revenue Account for the period ended June 30, 2025, Net Premium was Tk. 134,010,795 for April-June 2025 as against Tk. 134,127,640 for April-June 2024. Net Premium was Tk. 226,618,164 for January-June 2025 as against Tk. 225,447,945 for January-June 2024. Balance of Life Revenue Fund was Tk. 393,842,480 as on June 30, 2025 and Tk. 298,067,514 as on June 30, 2024.

DHAKABANK

The Company has informed that Mr. A.K.M. Shahnawaj has assumed the Current Charge of the office of the Managing Director of the company with effect from August 17, 2025.

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.