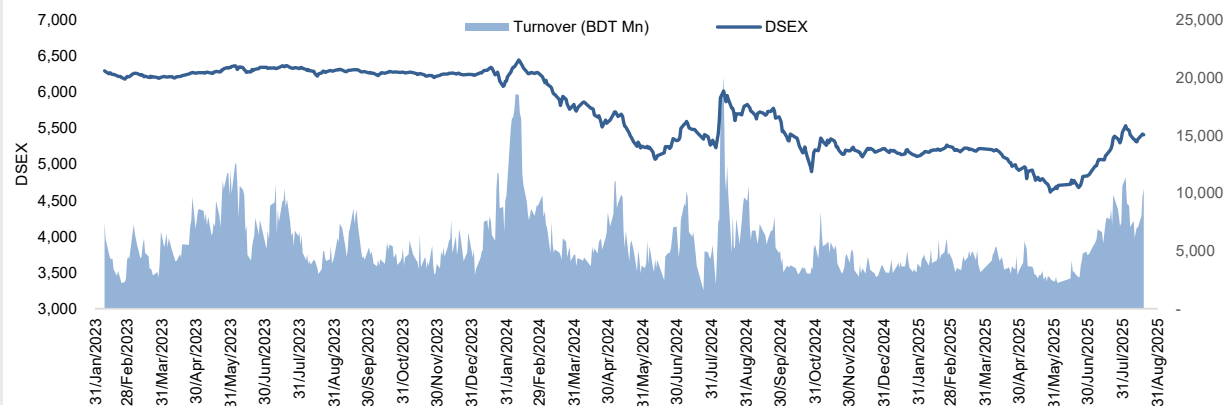


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.17%) lost 9.01 points and closed at 5,410.90. The blue-chip index DS30 (+0.14%), the Shariah-based index DSES (+0.43%), and the large-cap index CDSET (-0.22%) closed at 2,104.78, 1,189.60, and 1,107.59 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.54% followed by Telecommunication (-1.01%), NBFI (-0.38%), Fuel & Power (-0.28%), Food & Allied (-0.08%), Pharmaceutical (+0.41%), and Engineering (+0.91%), respectively. Block trades contributed 1.7% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+4.9%) was the most traded share with a turnover of BDT 478 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,410.90	5,419.91	-9.01	-0.17%	+3.7%
DS30	2,104.78	2,101.84	+2.94	+0.14%	+8.5%
DSES	1,189.60	1,184.53	+5.07	+0.43%	+1.8%
CDSET	1,107.59	1,110.08	-2.49	-0.22%	+3.9%

	Advanced	Declined	Unchanged	Total
All Category	164	164	72	400
A Category (Equity)	80	108	33	221
B Category (Equity)	45	28	10	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	39	28	29	96
Mutual Funds	8	11	17	36
Corporate Bonds	0	3	2	5
Treasury Bonds	1	1	0	2

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,115,902	7,165,790	-0.7%
	Mn USD	58,568	58,978	
Turnover	Mn BDT	10,375	9,759	+6.3%
	Mn USD	85	80	
Volume	Mn Shares	317	299	+5.9%
No. of Trade		283,981	266,930	+6.4%

\* Average Interbank Exchange Rate is BDT 121.50 as of Aug 19, 2025

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Figure: Sectorial Turnover (BDT Mn)

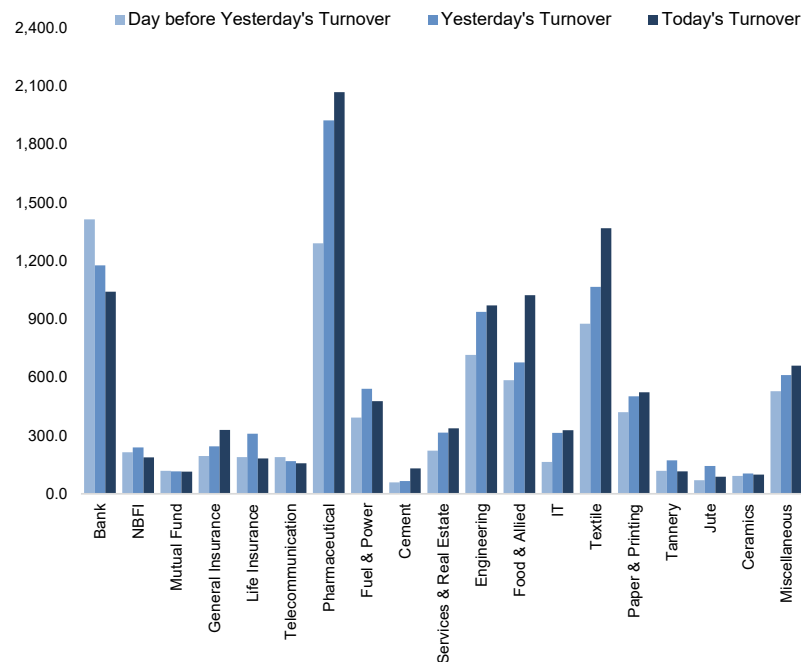
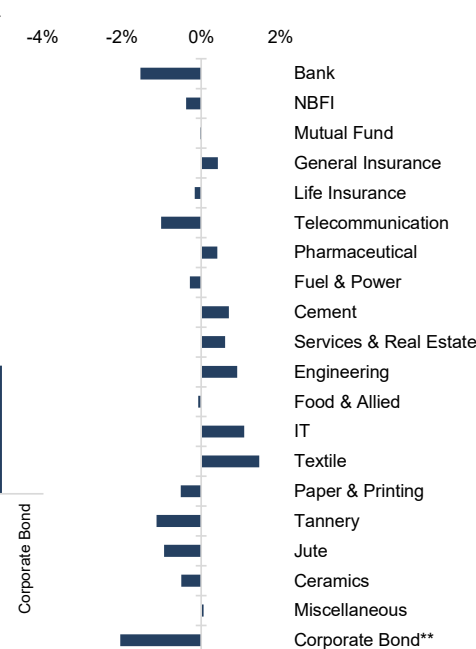


Figure: Sectorial Mcap Change



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

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	1,516	1,539	-23.64	-1.54%	36	717,215	10.1%	1,039.8	10.2%	NM	0.8x	GP	407,926	11.2%	43.0	13.9x	7.2x
NBFI	1,113	1,117	-4.26	-0.38%	23	106,047	1.5%	187.0	1.8%	NM	NM	SQURPHARMA	197,856	5.4%	93.9	8.4x	1.5x
Mutual Fund	573	573	-0.15	-0.03%	37	27,463	0.4%	114.6	1.1%	NM	0.5x	BATBC	155,736	4.3%	50.1	12.6x	2.9x
General Insurance	2,715	2,704	+11.48	+0.42%	43	77,486	1.1%	329.2	3.2%	13.0x	1.2x	ROBI	143,519	3.9%	47.4	16.5x	2.2x
Life Insurance	1,816	1,819	-2.95	-0.16%	15	48,307	0.7%	182.2	1.8%	NM	NM	WALTONHIL	139,377	3.8%	19.7	10.8x	1.2x
Telecommunication	4,941	4,992	-50.46	-1.01%	3	579,407	8.1%	157.1	1.5%	14.7x	4.2x	BRACBANK	132,596	3.6%	116.8	9.4x	1.6x
Pharmaceutical	3,169	3,156	+12.79	+0.41%	34	600,777	8.4%	2,067.1	20.3%	13.8x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,173	1,176	-3.33	-0.28%	23	310,690	4.4%	477.1	4.7%	19.6x	0.7x	MARICO	92,106	2.5%	7.0	15.0x	27.6x
Cement	2,093	2,079	+14.50	+0.70%	7	99,750	1.4%	130.1	1.3%	23.0x	2.2x	UPGDCL	80,404	2.2%	9.6	6.9x	1.9x
Services & Real Estate	1,031	1,025	+6.19	+0.60%	9	56,719	0.8%	336.6	3.3%	26.1x	0.4x	BERGERPBL	76,605	2.1%	7.4	21.8x	4.4x
Engineering	2,567	2,544	+23.09	+0.91%	42	289,598	4.1%	970.2	9.5%	13.7x	0.9x	LHB	65,850	1.8%	43.9	17.6x	3.5x
Food & Allied	15,057	15,069	-11.62	-0.08%	21	275,511	3.9%	1,022.1	10.0%	20.9x	4.4x	BXPBARMA	57,861	1.6%	478.4	9.0x	1.2x
IT	1,896	1,876	+20.41	+1.09%	11	25,011	0.4%	327.5	3.2%	21.0x	1.6x	RENATA	56,614	1.6%	33.1	20.1x	1.6x
Textile	1,166	1,149	+16.84	+1.47%	58	121,461	1.7%	1,366.5	13.4%	NM	0.8x	UNILEVERCL	48,113	1.3%	0.6	75.7x	26.4x
Paper & Printing	5,041	5,067	-26.00	-0.51%	6	22,776	0.3%	522.4	5.1%	NM	1.1x	ICB	46,745	1.3%	57.9	NM	1.1x
Tannery	2,105	2,129	-24.03	-1.13%	6	23,450	0.3%	115.1	1.1%	NM	1.7x	DUTCHBANGL	40,698	1.1%	18.4	10.8x	0.8x
Jute	14,015	14,147	-132.36	-0.94%	3	3,085	0.0%	88.1	0.9%	NM	NM	EBL	40,055	1.1%	13.2	5.7x	0.9x
Ceramics	405	407	-2.05	-0.50%	5	18,166	0.3%	98.3	1.0%	NM	1.2x	PUBALIBANK	38,262	1.0%	21.7	5.2x	0.7x
Miscellaneous	4,193	4,190	+2.52	+0.06%	15	227,681	3.2%	659.0	6.5%	90.2x	1.8x	CITYBANK	36,814	1.0%	188.1	3.4x	0.7x
Corporate Bond**	16,626	16,973	-346.86	-2.04%	16	36,706	0.5%	1.6	0.0%	NM	NM	OLYMPIC	34,030	0.9%	108.6	18.4x	2.8x
Treasury Bond**	2,212	2,234	-21.52	-0.96%	235	3,455,339	48.5%	3.3	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
MEGHNACEM	46.4	+10.0%	5.4	NM	4.6x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	BXPHARMA	129.7	+4.9%	478.4	9.0x	1.2x
BEACHHATCH	53.2	+9.9%	364.3	11.3x	3.2x	ISLAMIBANK	74,730	5.3%	15.5x	1.0x	BSC	123.8	+2.8%	432.7	6.3x	1.3x
ISNLTD	60.0	+9.9%	35.4	NM	21.8x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	53.2	+9.9%	364.3	11.3x	3.2x
MEGCONMILK	21.7	+9.6%	1.7	NM	NM	BATBC	50,233	3.6%	12.6x	2.9x	ORIONINFU	509.6	+1.5%	249.5	NM	32.4x
VFSTD	8.0	+9.6%	14.2	66.7x	0.4x	WALTONHIL	46,773	3.3%	10.8x	1.2x	SONALIPAPR	208.7	+1.2%	198.7	20.2x	1.2x
SHYAMPSUG	135.1	+7.74%	5.1	NM	NM	BRACBANK	46,489	3.3%	9.4x	1.6x	AIL	51.5	+7.1%	195.2	19.0x	2.2x
ALLTEX	11.7	+7.3%	2.9	NM	1x	GP	44,708	3.2%	13.9x	7.2x	ASIATICLAB	54.7	+4.4%	194.6	22.7x	1.0x
AIL	51.5	+7.1%	195.2	19.0x	2.2x	RENATA	32,968	2.3%	20.1x	1.6x	CITYBANK	24.2	-1.6%	188.1	3.4x	0.7x
SHARPIND	18.7	+6.3%	19.2	29.2x	1.8x	BXPHARMA	23,409	1.7%	9.0x	1.2x	EHL	92.7	+3.5%	171.6	12.6x	1.1x
MONNOFABR	15.5	+6.2%	56.3	NM	0.6x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	MALEKSPIN	31.1	-	170.1	4.2x	0.5x
						CITYBANK	21,020	1.5%	3.4x	0.7x						
						LHB	20,953	1.5%	17.6x	3.5x						
						OLYMPIC	20,496	1.5%	18.4x	2.8x						
						ALARABANK	18,282	1.3%	37.1x	0.8x						
						BEACONPHAR	17,838	1.3%	32.2x	4.3x						
						PRIMEBANK	16,142	1.1%	3.9x	0.8x						
						ROBI	14,876	1.1%	16.5x	2.2x						
						UTTARABANK	13,699	1.0%	NM	0.8x						
						NBL	13,055	0.9%	NM	NM						
						BSRMLTD	12,852	0.9%	5.2x	0.6x						

\* 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
ASIATICLAB	56.3	51.0	46.4	891	6
ORIONINFU	500.0	465.0	38.3	79	7
BRACBANK	67.5	67.5	15.4	228	2
DOMINAGE	16.3	16.3	14.7	900	2
DBH1STMF	6.2	6.1	13.0	2,100	3
MARICO	2,784.8	2,784.8	12.5	5	1
FINEFOODS	262.0	262.0	6.9	26	4
ISNLTD	59.9	58.0	4.7	81	3
ENVOYTEX	48.8	48.8	3.9	80	2
MTB	11.8	11.8	3.5	300	1
EXIM1STMF	4.6	4.6	2.8	600	2
HAKKANIPUL	87.5	79.5	2.7	32	3
SONALIANS	240.0	234.0	2.4	10	2
RELIANCE1	15.8	15.6	2.1	133	3
SUNLIFEINS	52.0	52.0	2.1	40	1
AMANFEED	24.8	24.8	1.8	71	1
AL-HAJTEX	140.5	140.5	1.4	10	1
BSC	121.1	121.1	0.9	7	1
WALTONHIL	417.0	417.0	0.6	2	1
MERCANBANK	9.5	9.5	0.6	65	1
IFIC	6.1	6.1	0.6	100	1
LOVELLO	99.1	99.1	0.6	6	1
<b>Total</b>			<b>180.4</b>		<b>54</b>

**Important DSE News**
**SALVOCHEM**

The Board of Directors has recommended 2.50% Cash Dividend for the year ended June 30, 2025. Date of AGM: 29.09.2025; Time: 10:30 AM; Venue: Hybrid System at Institution of Diploma Engineers Bangladesh, IDEB Bhaban, 160/A, Kakrail VIP Road, Dhaka-1000, Bangladesh. Record Date: 08.09.2025. The Company has also reported EPS of Tk. 0.58, NAV per share of Tk. 16.57 and NOCFPS of Tk. 5.68 for the year ended June 30, 2025 as against Tk. 1.66, Tk. 16.24 and Tk. 5.43 respectively for the year ended June 30, 2024.

**PADMALIFE**

The company has informed that the Board of Directors of the company in its Meeting held on 20 July 2025 decided to appoint Mr. Md. Morshed Alam Siddiqui, Additional Managing Director as CEO (Acting) for the time being in the vacant post of CEO of Padma Islami Life Insurance Ltd. w.e.f. 4th August 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
TILIL		0.0%	5.0%	Record Date	4-Sep-25
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

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