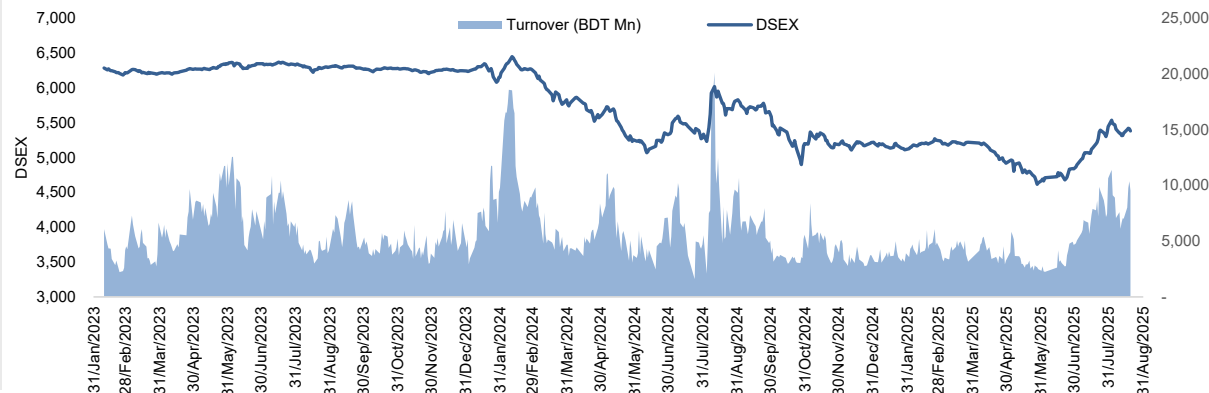


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.58%) lost 31.49 points and closed at 5,379.41. The blue-chip index DS30 (-0.88%), the Shariah-based index DSES (-1.00%), and the large-cap index CDSET (-0.62%) closed at 2,086.22, 1,177.67, and 1,100.73 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.82% followed by Engineering (-1.03%), Food & Allied (-0.94%), Pharmaceutical (-0.93%), Fuel & Power (-0.63%), Bank (-0.51%), and Telecommunication (-0.25%), respectively. Block trades contributed 2.4% of the overall market turnover. Bangladesh Shipping Corporation (-2.2%) was the most traded share with a turnover of BDT 354 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,379.41	5,410.90	-31.49	-0.58%	+3.1%
DS30	2,086.22	2,104.78	-18.56	-0.88%	+7.6%
DSES	1,177.67	1,189.60	-11.93	-1.00%	+0.8%
CDSET	1,100.73	1,107.59	-6.86	-0.62%	+3.2%

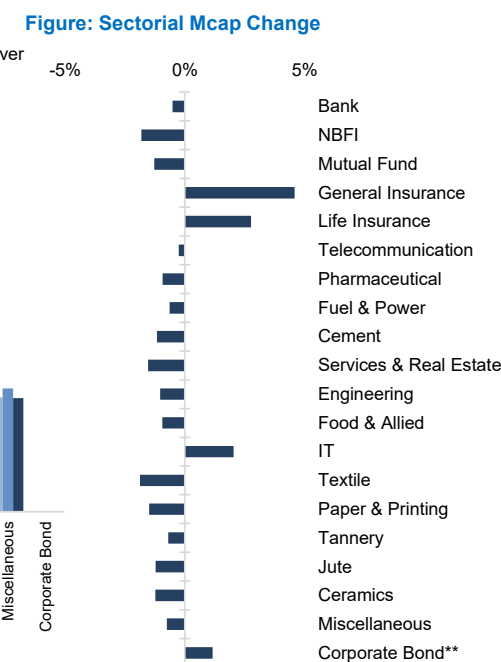
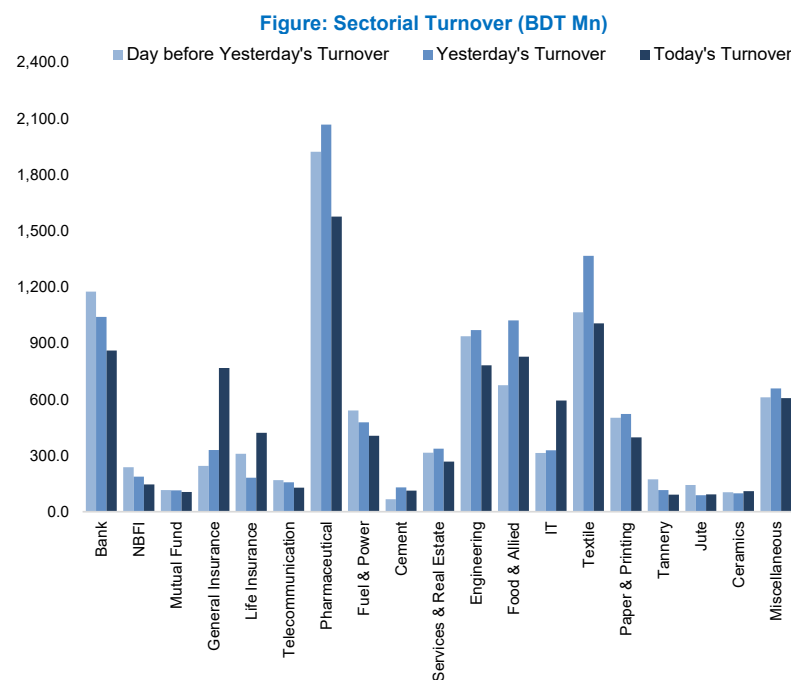
	Advanced	Declined	Unchanged	Total
All Category	124	223	51	398
A Category (Equity)	72	123	24	219
B Category (Equity)	23	54	6	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	46	21	96
Mutual Funds	4	20	12	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,098,196	7,115,902	-0.2%
	Mn USD	58,421	58,567	
Turnover	Mn BDT	9,538	10,375	-8.1%
	Mn USD	79	85	
Volume	Mn Shares	288	317	-9.0%
	No. of Trade	273,488	283,981	-3.7%

* Average Interbank Exchange Rate is BDT 121.50 as of Aug 20, 2025

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Market PE 15.3x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, 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	1,508	1,516	-7.76	-0.51%	36	713,542	10.0%	860.9	9.3%	NM	0.8x	GP	407,521	11.2%	22.8	13.8x	7.2x
NBFI	1,093	1,113	-20.21	-1.82%	23	104,122	1.5%	145.5	1.6%	NM	NM	SQURPHARMA	197,590	5.4%	87.3	8.4x	1.5x
Mutual Fund	566	573	-7.31	-1.28%	37	27,113	0.4%	105.5	1.1%	NM	0.5x	BATBC	154,764	4.3%	44.4	12.5x	2.9x
General Insurance	2,840	2,715	+124.55	+4.59%	43	81,040	1.1%	767.1	8.2%	13.6x	1.2x	ROBI	142,472	3.9%	38.1	16.4x	2.2x
Life Insurance	1,867	1,816	+50.28	+2.77%	15	49,644	0.7%	421.4	4.5%	NM	NM	WALTONHIL	138,287	3.8%	7.9	10.7x	1.2x
Telecommunication	4,929	4,941	-12.39	-0.25%	3	577,955	8.1%	128.4	1.4%	14.7x	4.2x	BRACBANK	135,184	3.7%	92.3	9.6x	1.6x
Pharmaceutical	3,139	3,169	-29.53	-0.93%	34	595,178	8.4%	1,575.8	16.9%	13.7x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,165	1,173	-7.40	-0.63%	23	308,729	4.3%	405.0	4.4%	19.5x	0.7x	MARICO	91,101	2.5%	15.0	14.9x	27.3x
Cement	2,069	2,093	-24.26	-1.16%	7	98,594	1.4%	112.2	1.2%	22.7x	2.2x	UPGDCL	80,056	2.2%	7.3	6.9x	1.9x
Services & Real Estate	1,016	1,031	-15.76	-1.53%	9	55,852	0.8%	267.5	2.9%	25.7x	0.4x	BERGERPBL	75,127	2.1%	33.3	21.4x	4.3x
Engineering	2,541	2,567	-26.48	-1.03%	42	286,610	4.0%	782.4	8.4%	13.5x	0.9x	LHB	64,805	1.8%	43.4	17.3x	3.4x
Food & Allied	14,916	15,057	-141.76	-0.94%	21	272,917	3.8%	828.1	8.9%	20.7x	4.3x	RENATA	56,614	1.6%	0.0	20.1x	1.6x
IT	1,935	1,896	+38.65	+2.04%	11	25,521	0.4%	594.2	6.4%	21.5x	1.6x	BXPHARMA	55,006	1.5%	272.6	8.6x	1.1x
Textile	1,144	1,166	-21.86	-1.87%	58	119,185	1.7%	1,006.0	10.8%	NM	0.8x	UNILEVERCL	47,690	1.3%	0.4	75.1x	26.2x
Paper & Printing	4,967	5,041	-74.77	-1.48%	6	22,438	0.3%	396.9	4.3%	NM	1.1x	ICB	45,358	1.2%	27.3	NM	1.1x
Tannery	2,090	2,105	-14.44	-0.69%	6	23,289	0.3%	91.1	1.0%	NM	1.7x	DUTCHBANGL	40,505	1.1%	15.7	10.8x	0.8x
Jute	13,844	14,015	-170.81	-1.22%	3	3,047	0.0%	92.9	1.0%	NM	NM	EBL	40,055	1.1%	34.3	5.7x	0.9x
Ceramics	400	405	-4.98	-1.23%	5	17,943	0.3%	110.1	1.2%	NM	1.2x	PUBALIBANK	37,481	1.0%	18.6	5.1x	0.7x
Miscellaneous	4,162	4,193	-31.21	-0.74%	15	225,987	3.2%	606.6	6.5%	89.5x	1.8x	CITYBANK	35,901	1.0%	228.8	3.3x	0.7x
Corporate Bond**	16,818	16,626	+192.27	+1.16%	16	37,130	0.5%	0.7	0.0%	NM	NM	OLYMPIC	33,350	0.9%	50.3	18.0x	2.8x
Treasury Bond**	2,217	2,212	+4.60	+0.21%	235	3,459,123	48.7%	7.4	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
ISNLTD	66.0	+10.0%	34.3	NM	24.0x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	BSC	121.1	-2.2%	354.1	6.1x	1.2x
PARAMOUNT	42.9	+10.0%	26.5	21.6x	1.6x	ISLAMIBANK	74,730	5.3%	15.3x	1.0x	BEACHHATCH	53.4	+0.4%	276.5	11.4x	3.2x
EASTERNINS	49.6	+10.0%	22.6	20.1x	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	BXPHARMA	123.3	-4.9%	272.6	8.6x	1.1x
CENTRALINS	41.9	+10.0%	49.9	24.6x	0.8x	BATBC	50,233	3.6%	12.5x	2.9x	CITYBANK	23.6	-2.5%	228.8	3.3x	0.7x
MEGHNACEM	51.0	+9.9%	7.0	NM	5.1x	WALTONHIL	46,773	3.3%	10.7x	1.2x	TECHNODRUG	36.6	+1.9%	208.9	NM	1.2x
CRYSTALINS	49.0	+9.87%	57.4	15.6x	1.9x	BRACBANK	46,489	3.3%	9.6x	1.6x	ORIONINFU	508.9	-0.1%	189.0	NM	32.4x
ZAHINTEX	4.6	+9.5%	3.1	NM	1x	GP	44,708	3.2%	13.8x	7.2x	BEACONPHAR	123.2	+3.1%	171.4	33.2x	4.4x
INTECH	24.5	+8.9%	47.2	NM	NM	RENATA	32,968	2.3%	20.1x	1.6x	SONALIPAPR	211.0	+1.1%	158.2	20.4x	1.3x
PRIMEINSUR	36.8	+7.3%	33.0	20.0x	1.6x	BXPHARMA	23,409	1.7%	8.6x	1.1x	AIL	51.9	+0.8%	152.6	19.2x	2.2x
TILIL	60.6	+7.1%	56.0	11.0x	NM	PUBALIBANK	22,905	1.6%	5.1x	0.7x	MALEKSPIN	30.8	-1.0%	138.7	4.2x	0.5x
						CITYBANK	21,020	1.5%	3.3x	0.7x						
						LHB	20,953	1.5%	17.3x	3.4x						
						OLYMPIC	20,496	1.5%	18.0x	2.8x						
						ALARABANK	18,282	1.3%	37.1x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
STANCERAM	88.2	-7.5%	4.1	NM	NM	BEACONPHAR	17,838	1.3%	33.2x	4.4x	ASIATICLAB	59.9	59.8	3.0	1,773	106.07
JUTESPINN	224.2	-6.7%	1.1	NM	NM	PRIMEBANK	16,142	1.1%	3.9x	0.8x	CITYBANK	25.2	24.3	3.0	1,305	32.82
EXIMBANK	4.8	-5.9%	17.9	NM	0.2x	ROBI	14,876	1.1%	16.4x	2.2x	FINEFOODS	266.0	255.0	2.0	79	20.72
MITHUNKNIT	19.3	-5.9%	4.5	NM	6.1x	UTTARABANK	13,699	1.0%	NM	0.8x	EBL	26.0	26.0	1.0	454	11.80
DSHGARME	120.8	-5.5%	31.1	NM	6.5x	NBL	13,055	0.9%	NM	NM	UTTARABANK	21.0	21.0	1.0	476	10.00
DULAMIAACOT	106.4	-5.1%	7.4	NM	NM	BSRMLTD	12,852	0.9%	5.1x	0.5x	DOMINAGE	16.2	15.8	3.0	502	8.08
BXPHARMA	123.3	-4.9%	272.6	8.6x	1.1x						PRAGATILIF	140.0	137.0	3.0	55	7.59
RAHIMTEXT	185.2	-4.8%	16.3	NM	7.3x						ISNLTD	66.0	58.0	5.0	107	6.35
CAPMBDBLMF	8.0	-4.8%	5.8	NM	1.0x						CAPMBDBLMF	8.5	8.5	1.0	500	4.25
BAYLEASING	4.2	-4.5%	0.3	NM	NM						POPULARLIF	48.3	47.9	2.0	56	2.69

* 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	59.9	59.8	106.1	1,773	3
CITYBANK	25.2	24.3	32.8	1,305	3
FINEFOODS	266.0	255.0	20.7	79	2
EBL	26.0	26.0	11.8	454	1
UTTARABANK	21.0	21.0	10.0	476	1
DOMINAGE	16.2	15.8	8.1	502	3
PRAGATILIF	140.0	137.0	7.6	55	3
ISNLTD	66.0	58.0	6.4	107	5
CAPMBDBLMF	8.5	8.5	4.3	500	1
POPULARLIF	48.3	47.9	2.7	56	2
GQBALLPEN	300.0	300.0	2.0	7	1
BSCPLC	154.9	152.0	1.7	11	2
DHAKAINS	32.5	32.5	1.7	52	1
PTL	49.9	48.6	1.7	34	2
AMANFEED	25.8	25.8	1.7	65	1
BANGAS	125.5	125.5	1.4	11	1
TILIL	55.0	55.0	1.4	26	2
BXPHARMA	127.0	127.0	1.3	10	1
BSC	123.9	121.2	1.2	10	2
PRAGATIINS	54.0	54.0	0.9	17	1
BEXIMCO	99.1	99.1	0.9	9	1
ROBI	27.7	27.7	0.9	31	1
Total			232.1		47

Important DSE News

GIB

The company has informed that the Shareholders of the company in its 11th Annual General Meeting (AGM) held on August 19, 2024 at 11.00 a.m. have considered and approved, among others, the followings under Special Resolutions regarding Initial Public Offer (IPO) utilization: (i) Transfer of the remaining amount BDT 31,98,032.00 under the head of Estimated IPO Expense to the Investment in SME head subject to approval of Bangladesh Securities and Exchange Commission and other regulatory authorities (if any); (ii) 24 (Twenty-Four) Months' time extension for utilization of the remaining amount of IPO Proceeds as on date till November 09, 2026 subject to approval of the Bangladesh Securities and Exchange Commission and other regulatory authorities (if any). According to the Statement of the Utilization of IPO proceeds of the company for the quarter ended June 30, 2025; a total of BDT 73,81,98,032.00 has been remaining un-utilized. The IPO proceeds could not be fully utilized due to lack of potential investors in SME Sector and volatile Capital Market, Russia-Ukraine war, Political Unrest in the country and also war conflicts in Middle East. The details of the utilization of IPO proceeds are available in the Bank's website www.globalislamibankbd.com.

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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