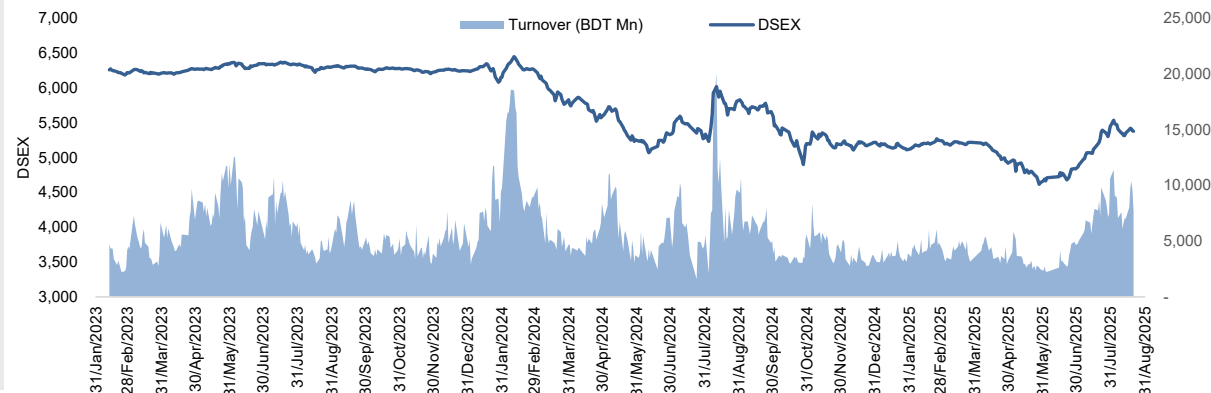


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.08%) lost 4.45 points and closed at 5,374.96. The blue-chip index DS30 (+0.15%), the Shariah-based index DSES (+0.23%), and the large-cap index CDSET (-0.18%) closed at 2,089.44, 1,180.34, and 1,098.75 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 0.81% followed by NBFi (-0.76%), Bank (-0.72%), Fuel & Power (-0.44%), Engineering (-0.27%), Food & Allied (+0.02%), and Pharmaceutical (+0.20%), respectively. Block trades contributed 1.7% of the overall market turnover. Bangladesh Shipping Corporation (+0.6%) was the most traded share with a turnover of BDT 308 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,374.96	5,379.41	-4.45	-0.08%	+3.0%
DS30	2,089.44	2,086.22	+3.22	+0.15%	+7.7%
DSES	1,180.34	1,177.67	+2.66	+0.23%	+1.0%
CDSET	1,098.75	1,100.73	-1.98	-0.18%	+3.1%

	Advanced	Declined	Unchanged	Total
All Category	117	208	72	397
A Category (Equity)	59	118	42	219
B Category (Equity)	31	42	10	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	27	48	20	95
Mutual Funds	3	10	23	36
Corporate Bonds	0	2	0	2
Treasury Bonds	1	2	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,081,813	7,098,196	-0.2%
	Mn USD	58,287	58,421	
Turnover	Mn BDT	7,668	9,538	-19.6%
	Mn USD	63	79	
Volume	Mn Shares	224	288	-22.1%
No. of Trade		236,307	273,488	-13.6%

* Average Interbank Exchange Rate is BDT 121.50 as of Aug 21, 2025

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Figure: Sectorial Turnover (BDT Mn)

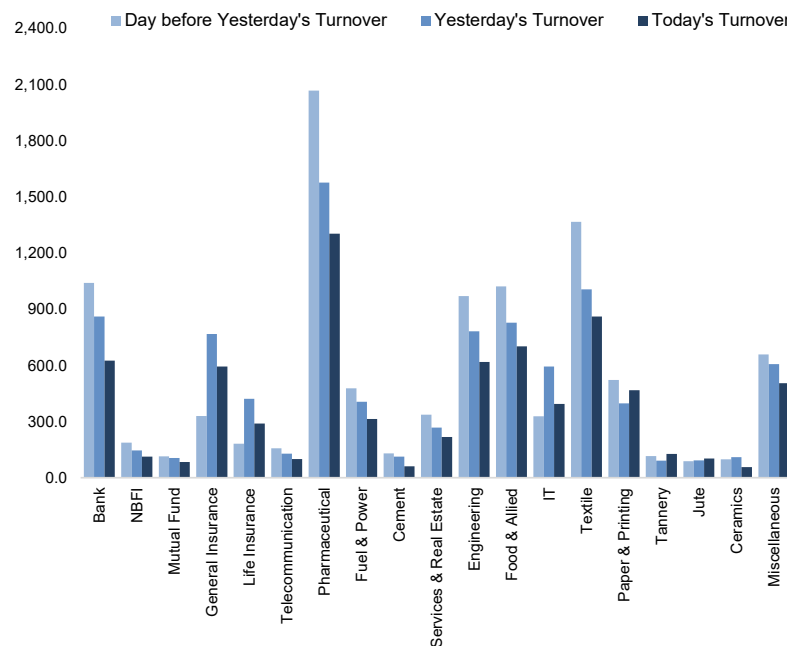
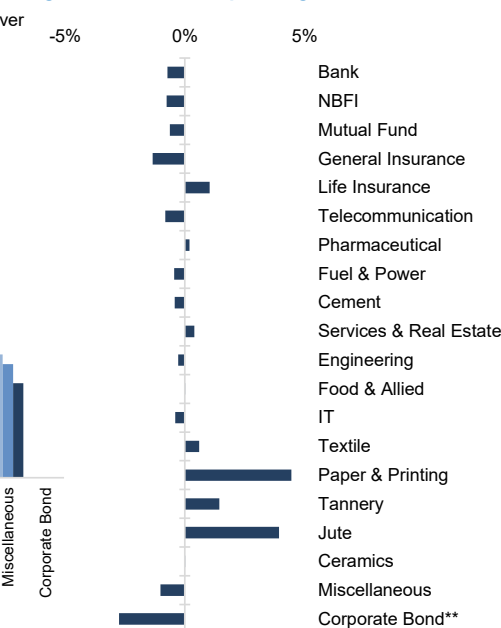


Figure: Sectorial Mcap Change



Market PE 15.2x

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	1,497	1,508	-10.92	-0.72%	36	708,375	10.0%	625.2	8.3%	NM	0.8x	GP	404,010	11.2%	36.8	13.7x	7.1x
NBFI	1,084	1,093	-8.32	-0.76%	23	103,329	1.5%	113.2	1.5%	NM	NM	SQRPHARMA	196,172	5.4%	84.1	8.3x	1.5x
Mutual Fund	562	566	-3.52	-0.62%	37	26,944	0.4%	83.9	1.1%	NM	0.5x	BATBC	154,548	4.3%	32.5	12.5x	2.9x
General Insurance	2,801	2,840	-38.18	-1.34%	43	79,951	1.1%	593.4	7.9%	13.5x	1.2x	ROBI	141,424	3.9%	32.1	16.3x	2.2x
Life Insurance	1,886	1,867	+19.36	+1.04%	15	50,159	0.7%	288.9	3.8%	NM	NM	WALTONHIL	137,408	3.8%	7.4	10.6x	1.2x
Telecommunication	4,889	4,929	-40.15	-0.81%	3	573,247	8.1%	99.8	1.3%	14.5x	4.2x	BRACBANK	134,388	3.7%	53.6	9.5x	1.6x
Pharmaceutical	3,145	3,139	+6.24	+0.20%	34	596,360	8.4%	1,303.0	17.3%	13.7x	1.7x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,160	1,165	-5.18	-0.44%	23	307,357	4.3%	313.1	4.2%	19.4x	0.7x	MARICO	91,101	2.5%	0.0	14.9x	27.3x
Cement	2,060	2,069	-8.66	-0.42%	7	98,181	1.4%	61.1	0.8%	22.6x	2.2x	UPGDCL	79,766	2.2%	5.5	6.8x	1.9x
Services & Real Estate	1,020	1,016	+4.07	+0.40%	9	56,076	0.8%	217.7	2.9%	25.8x	0.4x	BERGERPBL	72,598	2.0%	37.4	20.7x	4.2x
Engineering	2,534	2,541	-6.90	-0.27%	42	285,832	4.0%	617.9	8.2%	13.5x	0.9x	LHB	64,689	1.8%	10.4	17.2x	3.4x
Food & Allied	14,919	14,916	+2.99	+0.02%	21	272,972	3.9%	701.6	9.3%	20.7x	4.3x	BXPBARMA	57,102	1.6%	152.3	8.9x	1.1x
IT	1,927	1,935	-7.80	-0.40%	11	25,418	0.4%	394.8	5.2%	21.4x	1.6x	RENATA	55,444	1.5%	39.5	19.7x	1.6x
Textile	1,151	1,144	+6.90	+0.60%	58	119,903	1.7%	860.5	11.4%	NM	0.8x	UNILEVERCL	47,471	1.3%	0.3	74.7x	26.0x
Paper & Printing	5,188	4,967	+221.36	+4.46%	6	23,438	0.3%	467.0	6.2%	NM	1.1x	ICB	44,924	1.2%	28.9	NM	1.1x
Tannery	2,121	2,090	+30.26	+1.45%	6	23,626	0.3%	126.8	1.7%	NM	1.8x	EBL	40,214	1.1%	17.8	5.8x	0.9x
Jute	14,389	13,844	+544.53	+3.93%	3	3,167	0.0%	103.2	1.4%	NM	NM	DUTCHBANGL	40,118	1.1%	10.1	10.7x	0.8x
Ceramics	400	400	+0.06	+0.01%	5	17,945	0.3%	56.8	0.8%	NM	1.2x	PUBALIBANK	37,351	1.0%	8.3	5.1x	0.6x
Miscellaneous	4,119	4,162	-42.22	-1.01%	15	223,694	3.2%	504.3	6.7%	88.6x	1.8x	CITYBANK	36,205	1.0%	81.0	3.3x	0.7x
Corporate Bond**	16,357	16,818	-461.54	-2.74%	16	36,111	0.5%	3.0	0.0%	NM	NM	OLYMPIC	33,410	0.9%	28.6	18.1x	2.8x
Treasury Bond**	2,217	2,217	+0.50	+0.02%	235	3,456,429	48.8%	5.7	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	72.6	+10.0%	218.9	NM	26.4x	SQRPHARMA	108,958	7.7%	8.3x	1.5x	BSC	121.8	+0.6%	307.5	6.2x	1.2x	
SAMATALETH	104.2	+9.9%	41.3	NM	7.3x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	BEACHHATCH	55.4	+3.7%	236.9	11.8x	3.4x	
SALVOCHEM	30.0	+9.9%	82.1	51.7x	1.8x	BEXIMCO	69,463	4.9%	NM	1.3x	ORIONINFU	524.4	+3.0%	226.1	NM	33.4x	
LEGACYFOOT	74.2	+9.3%	63.2	NM	6.7x	BATBC	50,233	3.6%	12.5x	2.9x	ISNLTD	72.6	+10.0%	218.9	NM	26.4x	
KAY&QUE	352.1	+8.7%	91.7	NM	3.6x	WALTONHIL	46,773	3.3%	10.6x	1.2x	SONALIPAPR	229.4	+8.7%	190.2	22.2x	1.4x	
SONALIPAPR	229.4	+8.72%	190.2	22.2x	1.4x	BRACBANK	46,489	3.3%	9.5x	1.6x	CRYSTALINS	51.5	+5.1%	154.8	16.4x	2.0x	
ZAHIINTX	5.0	+8.7%	4.6	NM	1x	GP	44,708	3.2%	13.7x	7.1x	BXPBARMA	128.0	+3.8%	152.3	8.9x	1.1x	
BDAUTOCA	148.3	+8.3%	43.4	NM	20.1x	RENATA	32,968	2.3%	19.7x	1.6x	ASIATICLAB	55.8	+2.4%	137.0	23.1x	1.0x	
GQBALLPEN	361.3	+8.3%	35.4	NM	2.6x	BXPBARMA	23,409	1.7%	8.9x	1.1x	TECHNODRUG	37.4	+2.2%	125.7	NM	1.2x	
ZEALBANGLA	103.1	+8.3%	3.2	NM	NM	PUBALIBANK	22,905	1.6%	5.1x	0.6x	AIL	53.2	+2.5%	121.6	19.7x	2.2x	
						CITYBANK	21,020	1.5%	3.3x	0.7x							
						LHB	20,953	1.5%	17.2x	3.4x							
						OLYMPIC	20,496	1.5%	18.1x	2.8x							
						ALARABANK	18,282	1.3%	37.3x	0.8x							
						BEACONPHAR	17,838	1.3%	33.0x	4.4x							
						PRIMEBANK	16,142	1.1%	3.9x	0.8x							
						ROBI	14,876	1.1%	16.3x	2.2x							
						UTTARABANK	13,699	1.0%	NM	0.8x							
						NBL	13,055	0.9%	NM	NM							
						BSRMLTD	12,852	0.9%	5.1x	0.5x							
						* 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
SEAPEARL	53.5	53.5	35.9	671	2
STANDBANKL	7.4	7.4	23.2	3,140	4
AL-HAJTEX	146.1	143.0	5.8	40	4
MJLBD	100.7	100.7	5.5	55	5
MONNOFABR	16.7	16.7	5.0	300	1
EIL	37.5	36.5	4.3	115	4
PRAGATILIF	145.5	141.0	4.2	30	4
CLICL	50.5	50.5	3.8	75	1
ORIONPHARM	35.1	35.1	3.5	100	2
SQURPHARMA	230.0	222.8	3.5	15	3
SALVOCHEM	29.9	28.3	3.0	102	3
HAMI	104.9	104.9	2.9	27	1
EBL	27.6	27.6	2.8	100	1
EASTRNLAB	2,650.0	2,650.0	2.7	1	1
ISNLTD	70.0	60.0	2.5	40	2
PUBALIBANK	30.5	30.5	2.3	75	2
EXIM1STMF	4.6	4.6	1.9	409	3
RELIANCE1	15.1	15.1	1.8	120	3
ORIONINFU	507.0	492.1	1.4	3	2
AMANFEED	25.7	25.7	1.3	50	1
FINEFOODS	250.0	250.0	1.3	5	1
SAMATALETH	92.0	92.0	1.2	13	1
Total			126.9		61

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

Important DSE News

RAHIMAFODD

The Company has informed that 16,30,052 shares of Late Fazlur Rahman, former director of the company who passed away on 25.12.2023, will be transmitted among his successors according to the Succession Certificate issued by the Honorable Court. As such, Mrs. Hamida Rahman, Director of the company, will receive 203,757 shares. Mr. Md. Hasan, Director of the company, will receive 570,518 shares. Mrs. Farzana Rahman, Director of the company, will receive 285,259 shares. Ms. Shampa Rahman, Nominee Director of the company, will receive 285,259 shares. Ms. Razia Sultana, General Shareholder of the company, will receive 285,259 shares.

GIB

Refer to their earlier news disseminated by DSE on 13.07.2025 the company has informed that the honorable Shareholders in the 11th Annual General Meeting (ACM) held on August 19, 2025 have considered and approved among others the Agenda No. 02 under Ordinary Business. Revocation of the total 10% Dividend: The honorable Shareholders in the 11th AGM 'REVOKED' the total dividend of 10% in combination of 5% cash and 5% stock dividend. as recommended earlier by the Board of Directors of the Bank for the year ended December 31, 2023; Approval of No Dividend: The honorable Shareholders in 11th AGM also approved 'NO DIVIDEND' as recommended by the Board of Directors of the Bank in its 107th meeting held on July 08, 2025 for the year ended December 31, 2023.

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