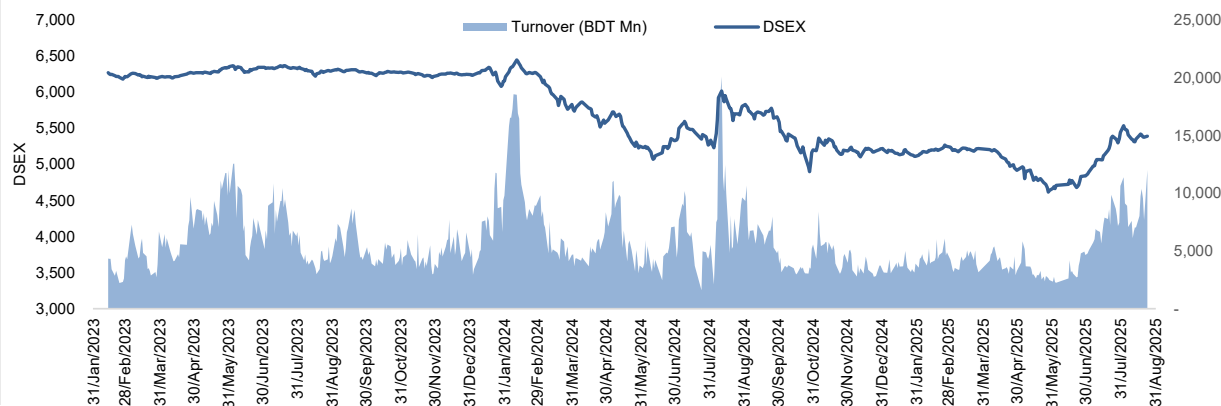


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.26%) gained 14.21 points and closed at 5,389.17. The blue-chip index DS30 (+0.58%), the Shariah-based index DSES (-0.07%), and the large-cap index CDSET (+0.12%) closed at 2,101.60, 1,179.53, and 1,100.09 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.77% followed by Telecommunication (-0.76%), NBFI (-0.75%), Engineering (-0.50%), Fuel & Power (-0.40%), Food & Allied (+0.16%), and Pharmaceutical (+0.40%), respectively. Block trades contributed 1.4% of the overall market turnover. Malek Spinning Mills Ltd. (+9.8%) was the most traded share with a turnover of BDT 378 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,389.17	5,374.96	+14.21	+0.26%	+3.3%
DS30	2,101.60	2,089.44	+12.16	+0.58%	+8.3%
DSES	1,179.53	1,180.34	-0.81	-0.07%	+0.9%
CDSET	1,100.09	1,098.75	+1.34	+0.12%	+3.2%

	Advanced	Declined	Unchanged	Total
All Category	184	190	26	400
A Category (Equity)	128	77	15	220
B Category (Equity)	41	37	5	83
N Category (Equity)	1	0	0	1
Z Category (Equity)	14	76	6	96
Mutual Funds	2	23	10	35
Corporate Bonds	2	0	1	3
Treasury Bonds	2	3	0	5

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,094,538	7,081,813	+0.2%
	Mn USD	58,278	58,174	
Turnover	Mn BDT	12,003	7,668	+56.5%
	Mn USD	99	63	
Volume	Mn Shares	373	224	+66.4%
No. of Trade		324,131	236,307	+37.2%

* Average Interbank Exchange Rate is BDT 121.74 as of Aug 24, 2025

Figure: Sectorial Turnover (BDT Mn)

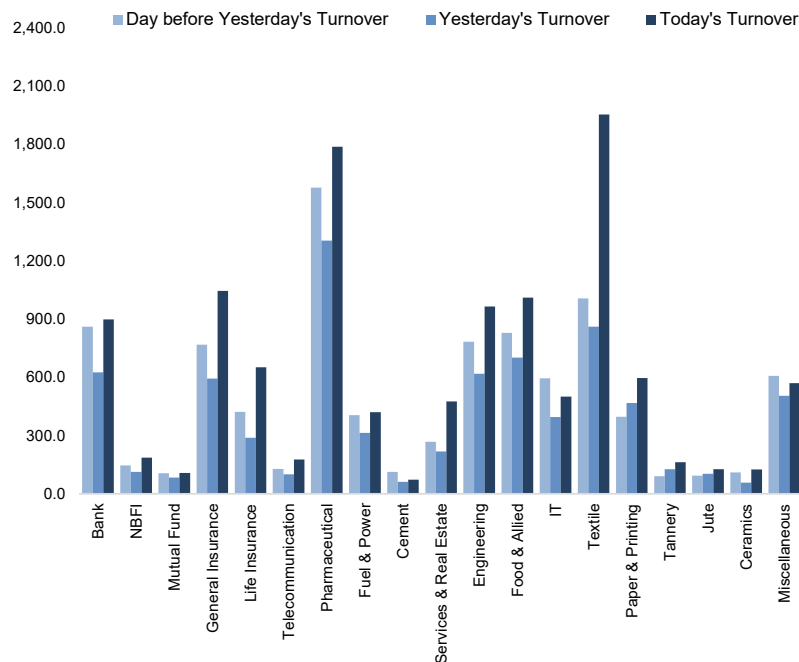
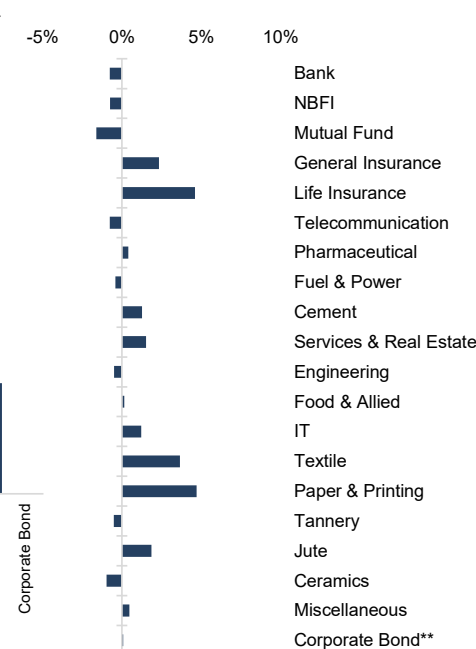


Figure: Sectorial Mcap Change



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

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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	1,486	1,497	-11.50	-0.77%	36	702,932	9.9%	897.4	7.6%	NM	0.8x	GP	400,499	11.1%	39.6	13.6x	7.0x
NBFI	1,076	1,084	-8.14	-0.75%	23	102,553	1.4%	185.6	1.6%	NM	NM	SQURPHARMA	196,526	5.4%	54.5	8.4x	1.5x
Mutual Fund	553	562	-9.10	-1.62%	37	26,508	0.4%	107.7	0.9%	NM	0.5x	BATBC	154,980	4.3%	27.9	12.5x	2.9x
General Insurance	2,867	2,801	+65.31	+2.33%	43	81,815	1.2%	1,044.4	8.8%	13.8x	1.2x	ROBI	140,900	3.9%	55.7	16.2x	2.2x
Life Insurance	1,973	1,886	+86.88	+4.61%	15	52,470	0.7%	651.8	5.5%	NM	NM	WALTONHIL	135,167	3.7%	14.9	10.5x	1.2x
Telecommunication	4,851	4,889	-37.28	-0.76%	3	568,875	8.0%	177.1	1.5%	14.4x	4.1x	BRACBANK	133,591	3.7%	89.6	9.4x	1.6x
Pharmaceutical	3,158	3,145	+12.67	+0.40%	34	598,763	8.4%	1,786.9	15.1%	13.7x	1.7x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,156	1,160	-4.68	-0.40%	23	306,116	4.3%	420.6	3.6%	19.3x	0.7x	MARICO	89,677	2.5%	12.8	14.6x	26.9x
Cement	2,086	2,060	+25.99	+1.26%	7	99,420	1.4%	73.3	0.6%	22.9x	2.2x	UPGDCL	79,940	2.2%	5.5	6.9x	1.9x
Services & Real Estate	1,035	1,020	+15.51	+1.52%	9	56,929	0.8%	475.1	4.0%	26.2x	0.4x	BERGERPBL	73,242	2.0%	23.8	20.8x	4.2x
Engineering	2,521	2,534	-12.61	-0.50%	42	284,409	4.0%	964.0	8.1%	13.4x	0.9x	LHB	65,618	1.8%	23.1	17.5x	3.5x
Food & Allied	14,942	14,919	+23.60	+0.16%	21	273,403	3.8%	1,010.1	8.5%	20.7x	4.3x	BXPHERMA	59,199	1.6%	342.8	9.2x	1.2x
IT	1,951	1,927	+23.60	+1.22%	11	25,729	0.4%	500.1	4.2%	21.6x	1.6x	RENATA	54,882	1.5%	21.9	19.5x	1.6x
Textile	1,193	1,151	+42.06	+3.65%	58	124,284	1.8%	1,953.3	16.5%	NM	0.8x	UNILEVERCL	47,413	1.3%	0.3	74.6x	26.0x
Paper & Printing	5,433	5,188	+244.73	+4.72%	6	24,544	0.3%	595.9	5.0%	NM	1.2x	ICB	45,705	1.3%	29.1	NM	1.1x
Tannery	2,110	2,121	-10.91	-0.51%	6	23,505	0.3%	162.8	1.4%	NM	1.8x	EBL	40,214	1.1%	8.7	5.8x	0.9x
Jute	14,657	14,389	+268.70	+1.87%	3	3,226	0.0%	126.4	1.1%	NM	NM	DUTCHBANGL	39,731	1.1%	10.6	10.6x	0.8x
Ceramics	396	400	-3.86	-0.96%	5	17,772	0.3%	125.5	1.1%	NM	1.1x	PUBALIBANK	37,742	1.0%	13.8	5.1x	0.7x
Miscellaneous	4,139	4,119	+19.34	+0.47%	15	224,744	3.2%	570.0	4.8%	89.0x	1.8x	CITYBANK	36,814	1.0%	184.0	3.4x	0.7x
Corporate Bond**	16,370	16,357	+13.63	+0.08%	16	36,141	0.5%	0.6	0.0%	NM	NM	OLYMPIC	33,070	0.9%	53.3	17.9x	2.7x
Treasury Bond**	2,227	2,217	+9.45	+0.43%	235	3,467,471	48.8%	5.1	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
AIL	58.5	+10.0%	260.0	21.6x	2.4x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	MALEKSPIN	33.5	+9.8%	377.9	4.6x	0.6x
ISNLTD	79.8	+9.9%	91.1	NM	29.0x	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	BXPHERMA	132.7	+3.7%	342.8	9.2x	1.2x
PTL	52.1	+9.9%	76.3	7.8x	1.2x	BEXIMCO	69,463	4.9%	NM	1.3x	BSC	123.9	+1.7%	311.6	6.3x	1.3x
CRYSTALINS	56.6	+9.9%	126.9	18.0x	2.2x	BATBC	50,233	3.6%	12.5x	2.9x	BEACHHATCH	56.8	+2.5%	288.9	12.1x	3.4x
MALEKSPIN	33.5	+9.8%	377.9	4.6x	0.6x	WALTONHIL	46,773	3.3%	10.5x	1.2x	AIL	58.5	+10.0%	260.0	21.6x	2.4x
CENTRALINS	43.7	+9.80%	220.3	25.7x	0.9x	BRACBANK	46,489	3.3%	9.4x	1.6x	SEAPEARL	60.4	+5.8%	243.9	NM	3.6x
MONNOFABR	17.4	+9.4%	99.1	NM	1x	GP	44,708	3.2%	13.6x	7.0x	CENTRALINS	43.7	+9.8%	220.3	25.7x	0.9x
MAGURAPLEX	114.0	+8.9%	172.9	33.3x	1.5x	RENATA	32,968	2.3%	19.5x	1.6x	ORIONINFU	532.8	+1.6%	188.7	NM	33.9x
GOBALLPEN	392.9	+8.7%	32.9	NM	2.9x	BXPHERMA	23,409	1.7%	9.2x	1.2x	SONALIPAPR	249.4	+8.7%	184.6	24.2x	1.5x
SONALIPAPR	249.4	+8.7%	184.6	24.2x	1.5x	PUBALIBANK	22,905	1.6%	5.1x	0.7x	CITYBANK	24.2	+1.7%	184.0	3.4x	0.7x
						CITYBANK	21,020	1.5%	3.4x	0.7x						
						LHB	20,953	1.5%	17.5x	3.5x						
						OLYMPIC	20,496	1.5%	17.9x	2.7x						
						ALARABANK	18,282	1.3%	36.9x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SIBL	5.5	-9.8%	4.3	NM	0.4x	BEACONPHAR	17,838	1.3%	34.0x	4.5x	SEAPEARL	55.0	51.4	7.0	518	28.07
UNIONCAP	3.7	-9.8%	4.4	NM	NM	PRIMEBANK	16,142	1.1%	3.9x	0.8x	SHAHJABANK	18.5	18.5	1.0	1,235	22.85
APOLOISPAT	2.8	-9.7%	3.7	NM	0.1x	ROBI	14,876	1.1%	16.2x	2.2x	LHB	58.2	58.2	1.0	300	17.46
BAYLEASING	3.8	-9.5%	2.9	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	AL-HAJTEX	151.0	143.0	4.0	68	9.84
EMERALDOIL	19.0	-9.5%	19.3	16.2x	NM	NBL	13,055	0.9%	NM	NM	DHAKAINS	41.5	41.5	1.0	230	9.55
SAIFPOWER	5.8	-9.4%	15.0	8.3x	0.3x	BSRMLTD	12,852	0.9%	5.2x	0.6x	ISNLTD	74.2	71.5	5.0	118	8.62
PHOENIXFIN	2.9	-9.4%	2.5	NM	NM						ASIATICLAB	57.1	53.1	3.0	122	6.86
MITHUNKNIT	18.5	-9.3%	9.1	NM	5.8x						PRAGATILIF	162.8	155.0	4.0	38	5.95
GSPFINANCE	3.9	-9.3%	0.8	NM	0.3x						BXPHERMA	134.0	130.0	6.0	36	4.72
BIFC	5.0	-9.1%	0.2	NM	NM						SPCL	43.3	43.3	1.0	100	4.33

* 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	55.0	51.4	28.1	518	7
SHAHJABANK	18.5	18.5	22.8	1,235	1
LHB	58.2	58.2	17.5	300	1
AL-HAJTEX	151.0	143.0	9.8	68	4
DHAKAINS	41.5	41.5	9.5	230	1
ISNLTD	74.2	71.5	8.6	118	5
ASIATICLAB	57.1	53.1	6.9	122	3
PRAGATILIF	162.8	155.0	6.0	38	4
BXPHARMA	134.0	130.0	4.7	36	6
SPCL	43.3	43.3	4.3	100	1
LOVELLO	87.5	87.0	3.8	43	2
INTRACO	25.0	23.4	3.7	156	2
NHFIL	25.0	25.0	3.7	147	2
SAMATALETH	107.5	96.4	3.6	36	3
APEXFOODS	256.0	256.0	3.3	13	1
PROVATIINS	32.1	32.1	2.8	88	1
CITYBANK	21.5	21.5	2.2	100	1
SEMLLECMF	7.1	7.0	2.1	300	2
ORIONINFU	501.2	501.0	2.1	4	3
PTL	50.0	50.0	2.0	41	2
KAY&QUE	352.0	352.0	1.9	6	1
BEXGSUKUK	58.0	58.0	1.7	30	1
Total			169.1		72

Important DSE News

MAGURAPLEX

The company has informed that as per Regulation 9 (i) of DSE/CSE Listing Regulations, 2015, to maintain paid up capital of Tk. 30.00 crore of Magura Multiplex PLC., an application was submitted to BSEC on 21-07-2025 to raise paid up capital from Tk. 296,033,780/- to Tk. 300,000,000/- by issuing shares for the shortfall amount of Tk. 3,966,220/- to 3 Sponsors of the company. Bangladesh Securities and Exchange Commission (BSEC) observed. That the offer was not made to the existing shareholders, Extra-ordinary General Meeting was not convened for consent of the general shareholders, PSI was not disseminated to issue new shares, proposed price of the shares was at face value which is below the prevailing market price and for containing emphasis-of-matter points in the audited financial statements, thus the proposal has been declined by the BSEC.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GRAMEENS2		0.0%	7.5%	Record Date	03-Sep-25
RELIANCE1		0.0%	0.0%	Record Date	04-Sep-25
SEMLLECMF		0.0%	0.0%	Record Date	04-Sep-25
SEMLFBSLGF		0.0%	0.0%	Record Date	04-Sep-25
PREMIERLEA		0.0%	0.0%	Record Date	04-Sep-25
TILIL		0.0%	5.0%	Record Date	04-Sep-25
SALVOCHEM		2.5%	0.0%	Record Date	08-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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