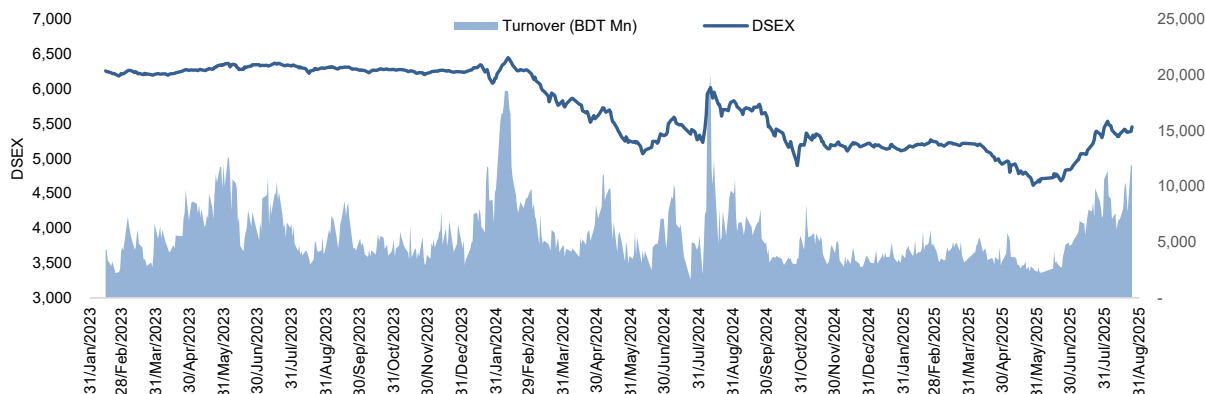


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.23%) gained 66.23 points and closed at 5,455.40. The blue-chip index DS30 (+1.29%), the Shariah-based index DSES (+0.85%), and the large-cap index CDSET (+1.14%) closed at 2,128.77, 1,189.52, and 1,112.67 points, respectively. All of the large-cap sectors posted positive performance today. Bank booked the highest gain of 1.89% followed by NBF1 (+1.34%), Fuel & Power (+0.98%), Telecommunication (+0.98%), Food & Allied (+0.92%), Pharmaceutical (+0.81%), and Engineering (+0.68%), respectively. Block trades contributed 1.4% of the overall market turnover. The City Bank Ltd. (+3.3%) was the most traded share with a turnover of BDT 393 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,455.40	5,389.17	+66.23	+1.23%	+4.6%
DS30	2,128.77	2,101.60	+27.17	+1.29%	+9.7%
DSES	1,189.52	1,179.53	+9.99	+0.85%	+1.8%
CDSET	1,112.67	1,100.09	+12.58	+1.14%	+4.4%

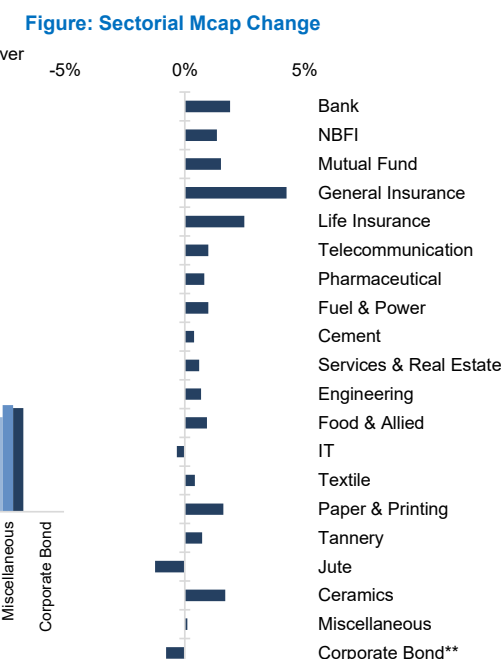
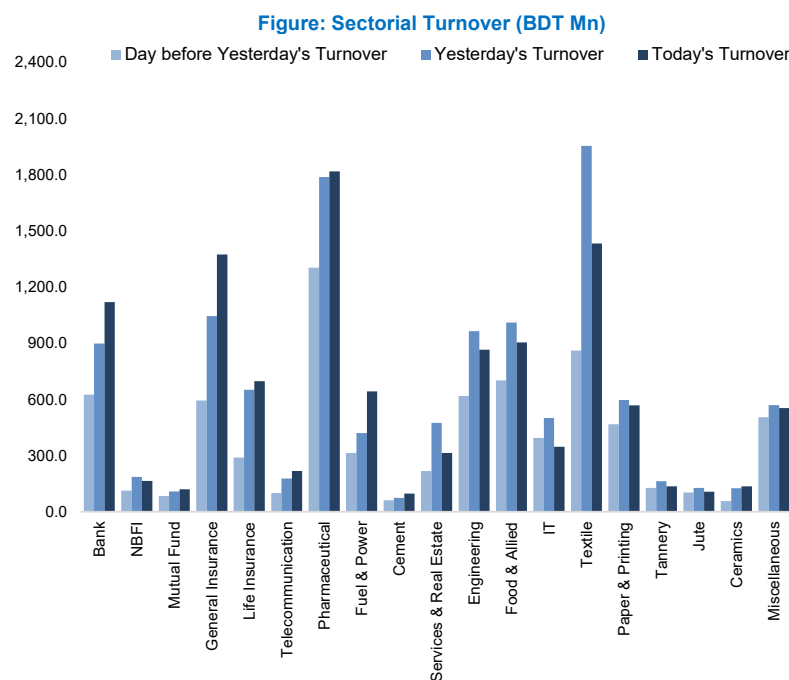
	Advanced	Declined	Unchanged	Total
All Category	238	114	44	396
A Category (Equity)	156	44	17	217
B Category (Equity)	47	26	10	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	35	44	17	96
Mutual Funds	19	3	14	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,126,612	7,094,538	+0.5%
	Mn USD	58,655	58,391	
Turnover	Mn BDT	11,778	12,003	-1.9%
	Mn USD	97	99	
Volume	Mn Shares	334	373	-10.5%
No. of Trade		311,697	324,131	-3.8%

* Average Interbank Exchange Rate is BDT 121.50 as of Aug 25, 2025

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Market PE 15.4x

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	1,514	1,486	+28.08	+1.89%	36	716,216	10.0%	1,118.9	9.6%	NM	0.8x	GP	403,335	11.0%	17.2	13.7x	7.1x
NBFI	1,091	1,076	+14.42	+1.34%	23	103,928	1.5%	164.7	1.4%	NM	NM	SQURPHARMA	197,856	5.4%	85.5	8.4x	1.5x
Mutual Fund	561	553	+8.37	+1.51%	37	26,909	0.4%	120.0	1.0%	NM	0.5x	BATBC	156,222	4.3%	49.4	12.6x	2.9x
General Insurance	2,989	2,867	+121.82	+4.25%	43	85,291	1.2%	1,372.6	11.8%	14.4x	1.3x	ROBI	142,996	3.9%	62.1	16.4x	2.2x
Life Insurance	2,022	1,973	+49.05	+2.49%	15	53,774	0.8%	696.7	6.0%	NM	NM	BRACBANK	136,976	3.7%	115.2	9.7x	1.6x
Telecommunication	4,899	4,851	+47.63	+0.98%	3	574,461	8.1%	217.8	1.9%	14.6x	4.2x	WALTONHIL	135,894	3.7%	16.0	10.5x	1.2x
Pharmaceutical	3,184	3,158	+25.73	+0.81%	34	603,641	8.5%	1,817.3	15.7%	13.9x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,167	1,156	+11.36	+0.98%	23	309,124	4.3%	642.0	5.5%	19.5x	0.7x	MARICO	90,742	2.5%	11.8	14.8x	27.2x
Cement	2,094	2,086	+8.01	+0.38%	7	99,801	1.4%	97.4	0.8%	23.0x	2.2x	UPGDCL	80,694	2.2%	12.2	6.9x	1.9x
Services & Real Estate	1,041	1,035	+6.27	+0.61%	9	57,274	0.8%	313.2	2.7%	26.3x	0.4x	BERGERPBL	72,873	2.0%	10.8	20.7x	4.2x
Engineering	2,538	2,521	+17.08	+0.68%	42	286,337	4.0%	864.3	7.4%	13.5x	0.9x	LHB	65,966	1.8%	46.0	17.6x	3.5x
Food & Allied	15,080	14,942	+137.68	+0.92%	21	275,923	3.9%	903.5	7.8%	20.9x	4.4x	BXPBARMA	58,664	1.6%	159.9	9.2x	1.2x
IT	1,944	1,951	-6.39	-0.33%	11	25,645	0.4%	346.5	3.0%	21.6x	1.6x	RENATA	54,584	1.5%	58.8	19.4x	1.6x
Textile	1,198	1,193	+5.08	+0.43%	58	124,813	1.7%	1,432.7	12.3%	NM	0.8x	UNILEVERCL	47,689	1.3%	0.5	75.1x	26.2x
Paper & Printing	5,520	5,433	+87.37	+1.61%	6	24,939	0.3%	568.3	4.9%	NM	1.2x	ICB	45,705	1.2%	19.7	NM	1.1x
Tannery	2,125	2,110	+15.27	+0.72%	6	23,675	0.3%	135.4	1.2%	NM	1.8x	EBL	40,374	1.1%	22.2	5.8x	0.9x
Jute	14,476	14,657	-181.40	-1.24%	3	3,187	0.0%	107.1	0.9%	NM	NM	DUTCHBANGL	39,731	1.1%	21.8	10.6x	0.8x
Ceramics	403	396	+6.70	+1.69%	5	18,073	0.3%	135.3	1.2%	NM	1.2x	CITYBANK	38,031	1.0%	393.0	3.5x	0.7x
Miscellaneous	4,143	4,139	+4.49	+0.11%	15	224,988	3.2%	552.8	4.8%	89.1x	1.8x	PUBALIBANK	38,002	1.0%	23.0	5.2x	0.7x
Corporate Bond**	16,243	16,370	-127.50	-0.78%	16	35,860	0.5%	0.8	0.0%	NM	NM	OLYMPIC	33,590	0.9%	63.0	18.2x	2.8x
Treasury Bond**	2,223	2,227	-3.31	-0.15%	235	3,459,571	48.5%	0.0	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
REPUBLIC	33.1	+10.0%	33.7	17.1x	1.8x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	CITYBANK	25.0	+3.3%	393.0	3.5x	0.7x
ORIONPHARM	35.4	+9.9%	107.8	NM	0.4x	ISLAMIBANK	74,730	5.3%	15.1x	1.0x	BEACONPHAR	138.3	+9.8%	320.5	37.3x	5.0x
CENTRALINS	48.0	+9.8%	103.5	28.2x	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	BSC	122.9	-0.8%	239.5	6.2x	1.2x
BEACONPHAR	138.3	+9.8%	320.5	37.3x	5.0x	BATBC	50,233	3.6%	12.6x	2.9x	MALEKSPIN	34.1	+1.8%	231.4	4.6x	0.6x
CONTININS	27.1	+9.7%	32.0	22.7x	1.2x	WALTONHIL	46,773	3.3%	10.5x	1.2x	SONALIPAPR	264.7	+6.1%	220.7	25.6x	1.6x
SPCL	47.0	+9.56%	145.1	NM	1.2x	BRACBANK	46,489	3.3%	9.7x	1.6x	BEACHHATCH	56.0	-1.4%	213.7	11.9x	3.4x
ASIAINS	30.3	+9.4%	44.5	14.5x	1x	GP	44,708	3.2%	13.7x	7.1x	ORIONINFU	508.4	-4.6%	210.3	NM	32.4x
PRAGATIINS	60.2	+8.9%	64.3	10.9x	1.1x	RENATA	32,968	2.3%	19.4x	1.6x	AIL	58.0	-0.9%	183.9	21.4x	2.4x
AMANFEED	27.0	+7.1%	47.4	60.0x	0.9x	BXPBARMA	23,409	1.7%	9.2x	1.2x	CVOPRL	174.9	+4.7%	176.1	65.3x	14.7x
MIRAKHTER	30.8	+6.9%	105.9	15.2x	0.6x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	BXPBARMA	131.5	-0.9%	159.9	9.2x	1.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.5x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BIFC	4.5	-10.0%	0.1	NM	NM	LHB	20,953	1.5%	17.6x	3.5x	RENATA	460.0	460.0	2.0	100	46.00
FASFIN	2.0	-9.1%	0.3	NM	NM	OLYMPIC	20,496	1.5%	18.2x	2.8x	CRYSTALINS	55.4	54.5	3.0	270	14.87
PREMIERLEA	2.1	-8.7%	0.1	NM	NM	ALARABANK	18,282	1.3%	37.5x	0.8x	RELIANCE1	15.1	14.0	13.0	805	12.08
PRIMEFIN	3.2	-8.6%	0.3	NM	0.5x	BEACONPHAR	17,838	1.3%	37.3x	5.0x	SQURPHARMA	222.5	212.8	5.0	52	11.63
ILFSL	2.2	-8.3%	0.0	NM	NM	PRIMEBANK	16,142	1.1%	3.9x	0.8x	SPCERAMICS	20.1	20.0	2.0	500	10.02
GSPFINANCE	3.6	-7.7%	1.3	NM	0.3x	ROBI	14,876	1.1%	16.4x	2.2x	FINEFOODS	265.1	265.1	3.0	37	9.73
NURANI	2.4	-7.7%	1.2	NM	0.3x	UTTARABANK	13,699	1.0%	NM	0.8x	CLICL	49.9	49.0	3.0	172	8.54
FIRSTFIN	2.5	-7.4%	0.3	NM	NM	NBL	13,055	0.9%	NM	NM	MONNOFABR	15.7	15.7	1.0	300	4.71
FAREASTFIN	2.5	-7.4%	0.3	NM	NM	BSRMLTD	12,852	0.9%	5.3x	0.6x	PTL	57.3	54.8	5.0	79	4.40
NEWLINE	5.8	-6.5%	7.1	NM	0.2x	* 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					MONOSPOOL	125.0	125.0	1.0	34	4.30

* 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	Important DSE News
RENATA	460.0	460.0	46.0	100	2	
CRYSTALINS	55.4	54.5	14.9	270	3	
RELIANCE1	15.1	14.0	12.1	805	13	
SQURPHARMA	222.5	212.8	11.6	52	5	
SPCERAMICS	20.1	20.0	10.0	500	2	
FINEFOODS	265.1	265.1	9.7	37	3	
CLICL	49.9	49.0	8.5	172	3	
MONNOFABR	15.7	15.7	4.7	300	1	
PTL	57.3	54.8	4.4	79	5	
MONOSPOOL	125.0	125.0	4.3	34	1	
LOVELLO	85.0	85.0	4.3	50	1	
ORIONINFU	515.0	515.0	4.2	8	1	
JAMUNABANK	20.6	20.6	4.1	200	1	
ASIATICLAB	57.0	55.7	3.7	66	3	
BEACHHATCH	60.5	60.3	2.8	46	2	
SAMATALETH	115.5	115.4	2.2	19	2	
KBPPWBIL	120.0	114.0	2.2	19	2	
ISNLTD	76.0	75.5	2.0	27	2	
BSCPLC	152.9	133.3	2.0	14	3	
AL-HAJTEX	150.1	150.0	1.9	13	2	
EXIM1STMF	4.5	4.4	1.9	429	2	
DBH1STMF	5.9	5.9	1.8	310	2	
Total			170.2		74	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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