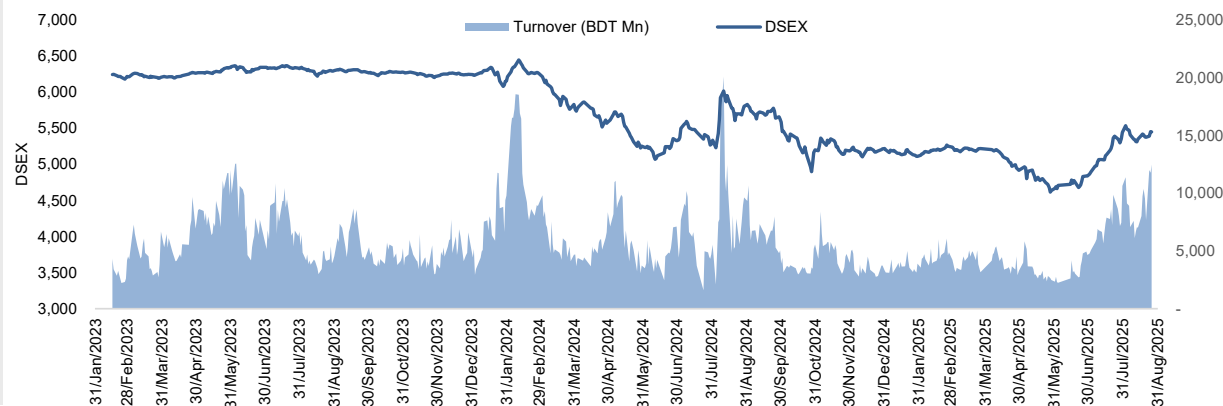


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.12%) lost 6.57 points and closed at 5,448.83. The blue-chip index DS30 (-0.24%), the Shariah-based index DSES (+0.06%), and the large-cap index CDSET (-0.16%) closed at 2,123.71, 1,190.23, and 1,110.92 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 1.95% followed by Engineering (+0.13%), Telecommunication (+0.03%). NBFI experienced the highest loss of 1.03% followed by Food & Allied (-0.68%), Bank (-0.64%), Pharmaceutical (-0.05%). Block trades contributed 1.5% of the overall market turnover. The City Bank Ltd. (0.0%) was the most traded share with a turnover of BDT 421 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,448.83	5,455.40	-6.57	-0.12%	+4.5%
DS30	2,123.71	2,128.77	-5.06	-0.24%	+9.5%
DSES	1,190.23	1,189.52	+0.71	+0.06%	+1.8%
CDSET	1,110.92	1,112.67	-1.75	-0.16%	+4.2%

	Advanced	Declined	Unchanged	Total
All Category	137	215	45	397
A Category (Equity)	66	124	28	218
B Category (Equity)	48	33	2	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	23	58	15	96
Mutual Funds	4	13	19	36
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,124,230	7,126,612	-0.0%
	Mn USD	58,464	58,484	-0.0%
Turnover	Mn BDT	12,477	11,778	+5.9%
	Mn USD	102	97	+5.9%
Volume	Mn Shares	376	334	+12.4%
No. of Trade		319,606	311,697	+2.5%

* Average Interbank Exchange Rate is BDT 121.86 as of Aug 26, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

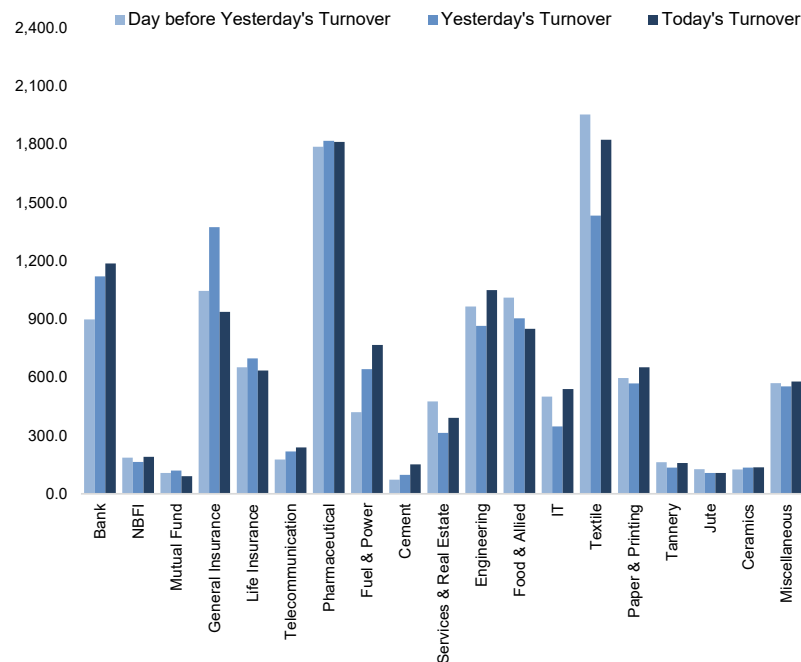
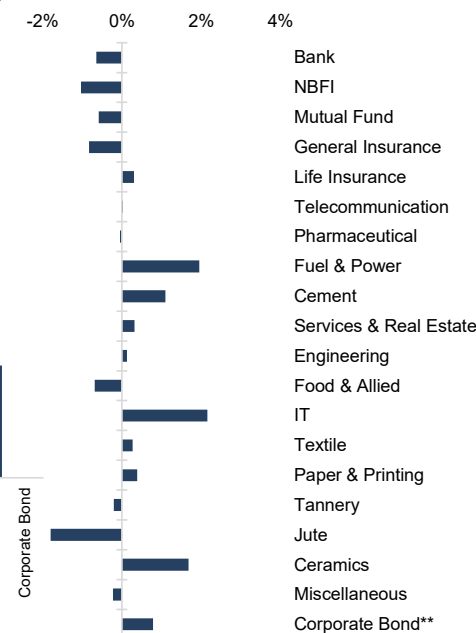


Figure: Sectorial Mcap Change



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	1,504	1,514	-9.76	-0.64%	36	711,597	10.0%	1,185.3	9.6%	NM	0.8x	GP	403,200	11.0%	32.8	13.7x	7.1x
NBFI	1,079	1,091	-11.24	-1.03%	23	102,857	1.4%	190.0	1.5%	NM	NM	SQURPHARMA	197,590	5.4%	112.2	8.4x	1.5x
Mutual Fund	558	561	-3.30	-0.59%	37	26,751	0.4%	90.7	0.7%	NM	0.5x	BATBC	154,710	4.2%	51.3	12.5x	2.9x
General Insurance	2,964	2,989	-24.81	-0.83%	43	84,583	1.2%	935.9	7.6%	14.2x	1.3x	ROBI	142,996	3.9%	76.4	16.4x	2.2x
Life Insurance	2,028	2,022	+6.12	+0.30%	15	53,937	0.8%	635.0	5.2%	NM	NM	BRACBANK	137,175	3.7%	99.6	9.7x	1.6x
Telecommunication	4,900	4,899	+1.24	+0.03%	3	574,606	8.1%	239.4	1.9%	14.6x	4.2x	WALTONHIL	135,954	3.7%	11.2	10.5x	1.2x
Pharmaceutical	3,182	3,184	-1.48	-0.05%	34	603,361	8.5%	1,810.9	14.7%	13.8x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,190	1,167	+22.77	+1.95%	23	315,156	4.4%	766.4	6.2%	19.9x	0.7x	MARICO	91,955	2.5%	12.6	15.0x	27.6x
Cement	2,117	2,094	+23.00	+1.10%	7	100,898	1.4%	152.0	1.2%	23.2x	2.2x	UPGDCL	84,056	2.3%	31.5	7.2x	2.0x
Services & Real Estate	1,045	1,041	+3.29	+0.32%	9	57,455	0.8%	390.9	3.2%	26.4x	0.4x	BERGERPBL	72,746	2.0%	6.5	20.7x	4.2x
Engineering	2,541	2,538	+3.20	+0.13%	42	286,698	4.0%	1,048.2	8.5%	13.5x	0.9x	LHB	66,431	1.8%	83.6	17.7x	3.5x
Food & Allied	14,977	15,080	-103.15	-0.68%	21	274,035	3.8%	849.4	6.9%	20.7x	4.3x	BXPBARMA	57,370	1.6%	264.2	9.0x	1.2x
IT	1,986	1,944	+41.93	+2.16%	11	26,198	0.4%	539.7	4.4%	22.0x	1.6x	RENATA	54,458	1.5%	36.6	19.4x	1.6x
Textile	1,202	1,198	+3.22	+0.27%	58	125,148	1.8%	1,822.4	14.8%	NM	0.8x	UNILEVERCL	47,852	1.3%	1.2	75.3x	26.2x
Paper & Printing	5,541	5,520	+21.42	+0.39%	6	25,035	0.4%	651.7	5.3%	NM	1.2x	ICB	45,531	1.2%	24.4	NM	1.1x
Tannery	2,120	2,125	-4.39	-0.21%	6	23,626	0.3%	158.0	1.3%	NM	1.8x	EBL	40,534	1.1%	35.3	5.8x	0.9x
Jute	14,216	14,476	-260.25	-1.80%	3	3,129	0.0%	107.6	0.9%	NM	NM	DUTCHBANGL	40,505	1.1%	17.6	10.8x	0.8x
Ceramics	410	403	+6.78	+1.68%	5	18,377	0.3%	136.0	1.1%	NM	1.2x	CITYBANK	38,031	1.0%	421.2	3.5x	0.7x
Miscellaneous	4,134	4,143	-9.34	-0.23%	15	224,481	3.1%	577.3	4.7%	88.9x	1.8x	PUBALIBANK	37,742	1.0%	14.1	5.1x	0.7x
Corporate Bond**	16,371	16,243	+128.18	+0.79%	16	36,143	0.5%	0.2	0.0%	NM	NM	OLYMPIC	33,170	0.9%	49.7	17.9x	2.8x
Treasury Bond**	2,224	2,223	+0.34	+0.02%	235	3,456,983	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
EPGL	18.7	+10.0%	20.9	NM	0.5x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	CITYBANK	25.0	-	421.2	3.5x	0.7x
NPOLYMER	34.2	+10.0%	81.9	25.7x	1.1x	ISLAMIBANK	74,730	5.3%	14.8x	0.9x	MALEKSPIN	33.8	-0.9%	295.8	4.6x	0.6x
ISNLTD	93.0	+9.9%	92.7	NM	33.8x	BEXIMCO	69,463	4.9%	NM	1.3x	BSC	120.1	-2.3%	270.4	6.1x	1.2x
AOL	15.1	+9.4%	11.1	29.0x	0.8x	BATBC	50,233	3.6%	12.5x	2.9x	SONALIPAPR	250.8	-5.3%	266.0	24.3x	1.5x
BPML	38.7	+9.3%	93.6	NM	0.6x	WALTONHIL	46,773	3.3%	10.5x	1.2x	BXPBARMA	128.6	-2.2%	264.2	9.0x	1.2x
TILIL	70.2	+9.01%	169.9	10.7x	NM	BRACBANK	46,489	3.3%	9.7x	1.6x	BEACONPHAR	141.5	+2.3%	251.5	38.1x	5.1x
REPUBLIC	36.0	+8.8%	73.1	18.6x	2x	GP	44,708	3.2%	13.7x	7.1x	BEACHHATCH	58.0	+3.6%	210.2	12.4x	3.5x
PROGRESLIF	57.4	+7.7%	10.6	NM	NM	RENATA	32,968	2.3%	19.4x	1.6x	AIL	60.6	+4.5%	208.8	22.4x	2.5x
INTRACO	24.6	+6.5%	122.8	21.8x	1.9x	BXPBARMA	23,409	1.7%	9.0x	1.2x	ORIONINFU	511.4	+0.6%	206.3	NM	32.6x
MONNOFABR	18.4	+6.4%	119.7	NM	0.7x	PUBALIBANK	22,905	1.6%	5.1x	0.7x	TILIL	70.2	+9.0%	169.9	10.7x	NM
						CITYBANK	21,020	1.5%	3.5x	0.7x						
						LHB	20,953	1.5%	17.7x	3.5x						
						OLYMPIC	20,496	1.5%	17.9x	2.8x						
						ALARABANK	18,282	1.3%	36.9x	0.8x						
						BEACONPHAR	17,838	1.3%	38.1x	5.1x						
						PRIMEBANK	16,142	1.1%	3.9x	0.8x						
						ROBI	14,876	1.1%	16.4x	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						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FASFIN	1.8	-10.0%	0.3	NM	NM						CENTRALINS	47.3	46.0	4.0	701	32.48
PREMIERLEA	1.9	-9.5%	0.0	NM	NM						LOVELLO	102.5	87.9	7.0	181	16.16
PRIMEFIN	2.9	-9.4%	0.5	NM	0.4x						PRAGATILIF	170.5	159.1	8.0	83	13.38
SHURWID	5.8	-9.4%	3.0	NM	0.5x						SEAPEARL	53.9	53.9	1.0	208	11.21
ILFSL	2.0	-9.1%	0.3	NM	NM						ASIATICLAB	55.3	53.9	3.0	200	10.88
BIFC	4.1	-8.9%	0.2	NM	NM						CITYGENINS	57.9	55.0	3.0	176	9.95
TALLUSPIN	5.3	-8.6%	2.1	NM	0.4x						FINEFOODS	270.0	267.0	2.0	30	8.04
GSPFINANCE	3.3	-8.3%	7.0	NM	0.3x						TILIL	65.0	61.0	5.0	102	6.33
FAREASTFIN	2.3	-8.0%	0.1	NM	NM						MEGHNALIFE	66.0	66.0	1.0	93	6.15
GIB	2.3	-8.0%	4.8	NM	NM						BDLAMPS	161.7	158.0	2.0	38	6.08

* 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
CENTRALINS	47.3	46.0	32.5	701	4
LOVELLO	102.5	87.9	16.2	181	7
PRAGATILIF	170.5	159.1	13.4	83	8
SEAPEARL	53.9	53.9	11.2	208	1
ASIATICLAB	55.3	53.9	10.9	200	3
CITYGENINS	57.9	55.0	10.0	176	3
FINEFOODS	270.0	267.0	8.0	30	2
TILIL	65.0	61.0	6.3	102	5
MEGHNALIFE	66.0	66.0	6.2	93	1
BDLAMPS	161.7	158.0	6.1	38	2
NHFIL	25.0	25.0	6.0	241	2
AIL	53.0	53.0	5.6	107	7
PTL	55.0	55.0	4.9	89	1
SIMTEX	18.6	18.6	4.9	262	1
ISNLTD	84.6	77.0	4.1	50	3
EXIM1STMF	4.5	4.4	3.1	688	3
CLICL	50.0	49.0	3.0	61	2
SAMATALETH	127.1	120.0	2.9	23	2
SPCERAMICS	20.4	20.3	2.5	125	2
CONFIDCEM	67.0	67.0	2.5	37	1
ORIONINFU	525.0	525.0	2.5	5	1
GOLDENSON	12.3	12.2	2.5	200	2
Total			190.0		90

Important DSE News
NRBCBANK

Mr. Syed Munsif Ali, a Sponsor of the Company, has expressed his intention to sell 30,00,000 shares out of his holding of 1,43,54,645 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 (thirty) working days.

NHFIL

United Commercial Bank PLC, a Corporate Sponsor of the company, has further informed that it has sold its entire holding of 5,635,624 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 24.07.2025.

GLOBALINS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Global Insurance PLC' instead of 'Global Insurance Limited' with effect from August 26, 2025. Other information (except name) will remain unchanged.

PHOENIXFIN

The Company has informed that Board of Directors of the Company decided to sell the Commercial Building (50% ownership) namely Phoenix Bhaban at 12, Dilkusha C/A, Dhaka to overcome the ongoing adverse situation of the Company.

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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