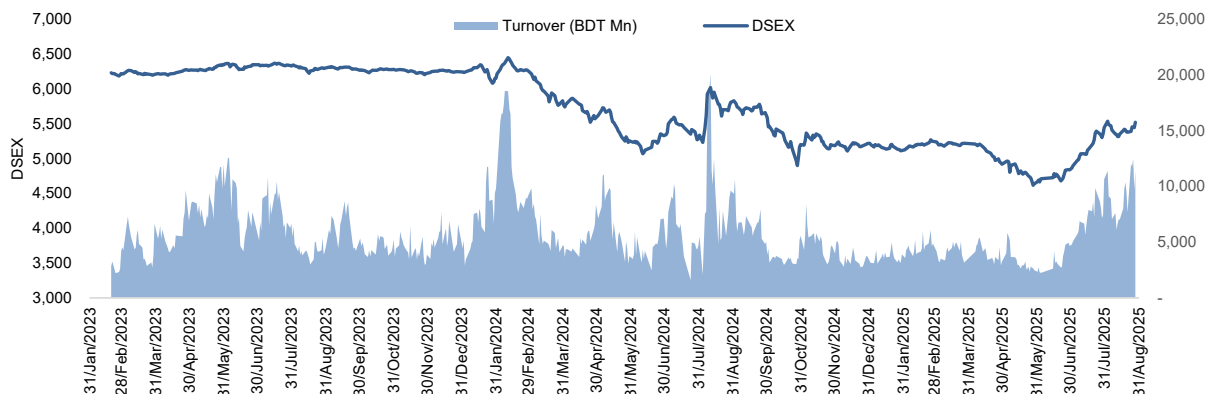


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.37%) gained 74.63 points and closed at 5,517.95. The blue-chip index DS30 (+1.93%), the Shariah-based index DSES (+1.55%), and the large-cap index CDSET (+1.39%) closed at 2,156.99, 1,207.20, and 1,122.79 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.66% followed by Bank (+2.01%), Telecommunication (+1.83%), Pharmaceutical (+1.61%), Food & Allied (+1.12%), Engineering (+1.08%), and Fuel & Power (+0.34%), respectively. Block trades contributed 1.8% of the overall market turnover. Renata Ltd. (+8.7%) was the most traded share with a turnover of BDT 227 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,517.95	5,443.31	+74.63	+1.37%	+5.8%
DS30	2,156.99	2,116.15	+40.84	+1.93%	+11.2%
DSES	1,207.20	1,188.72	+18.48	+1.55%	+3.3%
CDSET	1,122.79	1,107.37	+15.42	+1.39%	+5.3%

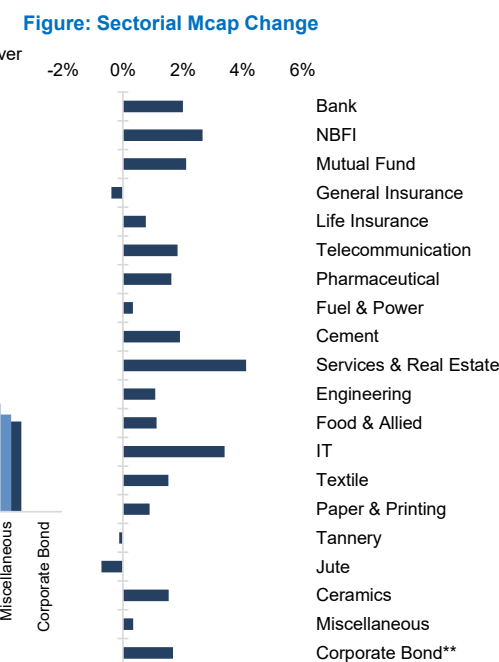
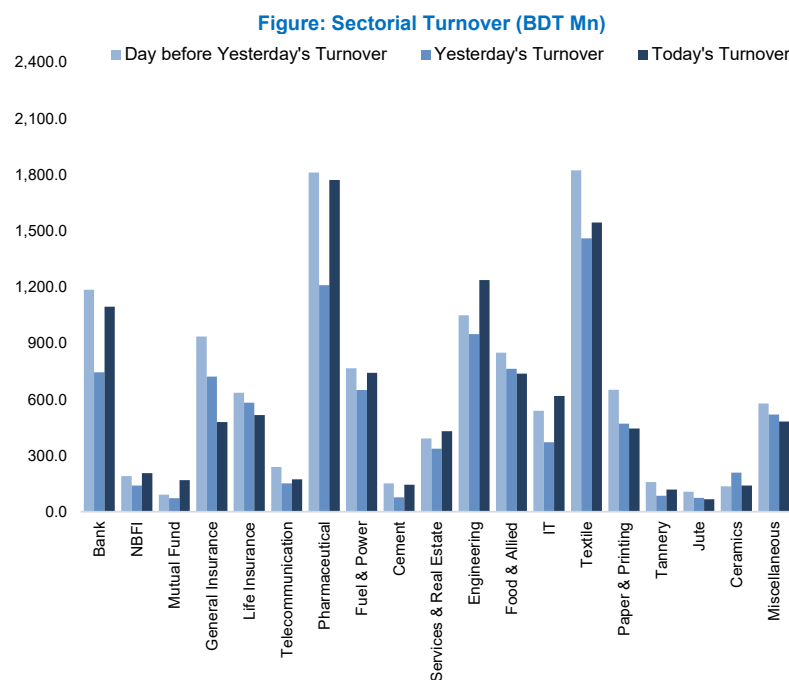
	Advanced	Declined	Unchanged	Total
All Category	281	86	31	398
A Category (Equity)	148	57	14	219
B Category (Equity)	58	18	7	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	75	11	10	96
Mutual Funds	25	2	9	36
Corporate Bonds	2	0	0	2
Treasury Bonds	0	2	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,183,560	7,129,748	+0.8%
	Mn USD	58,986	58,544	
Turnover	Mn BDT	11,323	9,715	+16.6%
	Mn USD	93	80	
Volume	Mn Shares	376	311	+21.0%
No. of Trade		298,772	271,340	+10.1%

* Based on Traded Scrips

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Market PE 16.3x

Market PB 1.3x

* 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	1,523	1,493	+29.97	+2.01%	36	720,466	10.0%	1,094.5	9.8%	NM	0.8x	GP	412,382	11.1%	32.6	14.0x	7.2x
NBFI	1,093	1,065	+28.32	+2.66%	23	104,173	1.4%	206.7	1.9%	NM	NM	SQURPHARMA	197,324	5.3%	78.2	8.4x	1.5x
Mutual Fund	570	558	+11.76	+2.11%	37	27,306	0.4%	169.1	1.5%	NM	0.5x	BATBC	156,654	4.2%	50.2	12.6x	2.9x
General Insurance	2,950	2,961	-11.31	-0.38%	43	84,185	1.2%	479.4	4.3%	14.2x	1.3x	ROBI	145,091	3.9%	79.2	16.7x	2.3x
Life Insurance	2,078	2,062	+15.84	+0.77%	15	55,269	0.8%	516.2	4.6%	NM	NM	BRACBANK	142,152	3.8%	191.4	10.0x	1.7x
Telecommunication	4,990	4,900	+89.60	+1.83%	3	585,098	8.1%	173.3	1.6%	14.8x	4.3x	WALTONHIL	136,651	3.7%	52.2	10.6x	1.2x
Pharmaceutical	3,226	3,175	+51.24	+1.61%	34	611,675	8.5%	1,771.5	15.9%	14.0x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,204	1,200	+4.05	+0.34%	23	318,873	4.4%	741.4	6.7%	20.1x	0.7x	MARICO	92,352	2.5%	2.5	15.1x	27.7x
Cement	2,147	2,107	+40.23	+1.91%	7	102,337	1.4%	144.4	1.3%	23.6x	2.3x	UPGDCL	85,331	2.3%	26.8	7.3x	2.0x
Services & Real Estate	1,105	1,061	+43.70	+4.12%	9	60,774	0.8%	430.5	3.9%	28.0x	0.5x	BERGERPBL	72,652	2.0%	11.7	20.7x	4.2x
Engineering	2,571	2,544	+27.43	+1.08%	42	290,057	4.0%	1,236.9	11.1%	13.7x	0.9x	LHB	67,011	1.8%	64.9	17.9x	3.5x
Food & Allied	15,084	14,916	+167.25	+1.12%	21	275,988	3.8%	737.6	6.6%	20.9x	4.4x	RENATA	59,195	1.6%	226.5	21.0x	1.7x
IT	2,045	1,978	+67.25	+3.40%	11	26,980	0.4%	617.6	5.6%	22.7x	1.7x	BXPHARMA	58,307	1.6%	132.3	9.1x	1.2x
Textile	1,243	1,225	+18.58	+1.52%	58	129,483	1.8%	1,544.7	13.9%	NM	0.9x	UNILEVERCL	47,781	1.3%	0.6	75.2x	26.2x
Paper & Printing	5,711	5,660	+50.25	+0.89%	6	25,799	0.4%	443.9	4.0%	NM	1.2x	ICB	45,531	1.2%	13.9	NM	1.1x
Tannery	2,105	2,108	-2.64	-0.13%	6	23,452	0.3%	118.6	1.1%	NM	1.7x	EBL	40,853	1.1%	50.7	5.8x	0.9x
Jute	14,008	14,110	-101.30	-0.72%	3	3,084	0.0%	67.1	0.6%	NM	NM	DUTCHBANGL	40,408	1.1%	15.7	10.8x	0.8x
Ceramics	420	414	+6.33	+1.53%	5	18,853	0.3%	139.6	1.3%	NM	1.2x	CITYBANK	38,487	1.0%	221.1	3.5x	0.7x
Miscellaneous	4,139	4,125	+13.99	+0.34%	15	224,744	3.1%	482.3	4.3%	89.0x	1.8x	PUBALIBANK	37,742	1.0%	15.3	5.1x	0.7x
Corporate Bond**	16,418	16,148	+269.27	+1.67%	16	36,246	0.5%	0.3	0.0%	NM	NM	OLYMPIC	33,250	0.9%	31.2	18.0x	2.8x
Treasury Bond**	2,233	2,232	+1.23	+0.06%	235	3,465,522	48.2%	3.6	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	
UNIONCAP	4.4	+10.0%	2.1	NM	NM	SQURPHARMA	108,958	7.7%	8.4x	1.5x	RENATA	516.1	+8.7%	226.5	21.0x	1.7x	
ISNLTD	105.7	+10.0%	157.6	NM	38.4x	ISLAMIBANK	74,730	5.3%	63.2x	1.0x	CITYBANK	25.3	+2.0%	221.1	3.5x	0.7x	
HRTEX	31.3	+9.8%	29.4	NM	10.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SONALIPAPR	280.7	+4.3%	210.9	27.2x	1.7x	
EPGL	22.5	+9.8%	148.4	NM	0.6x	BATBC	50,233	3.6%	12.6x	2.9x	BRACBANK	71.4	+3.3%	191.4	10.0x	1.7x	
BESTHLDNG	18.2	+9.6%	131.8	29.1x	0.3x	WALTONHIL	46,773	3.3%	10.6x	1.2x	QUASEMIND	45.8	+6.5%	182.6	NM	1.6x	
1STPRIMFMF	21.7	+9.60%	53.4	NM	2.0x	BRACBANK	46,489	3.3%	10.0x	1.7x	ORIONINFU	519.7	+0.3%	180.1	NM	33.1x	
INTECH	28.2	+9.3%	45.4	NM	NM	GP	44,708	3.2%	14.0x	7.2x	SINOBANGLA	53.7	+2.5%	169.5	42.2x	2.1x	
REGENTTEX	3.6	+9.1%	1.5	NM	0.1x	RENATA	32,968	2.3%	21.0x	1.7x	BEACONPHAR	142.8	+3.6%	167.2	38.5x	5.1x	
TUNGHAI	2.4	+9.1%	0.3	NM	NM	BXPHARMA	23,409	1.7%	9.1x	1.2x	ISNLTD	105.7	+10.0%	157.6	NM	38.4x	
RENATA	516.1	+8.7%	226.5	21.0x	1.7x	PUBALIBANK	22,905	1.6%	5.1x	0.7x	TILIL	83.2	+7.9%	156.8	10.8x	NM	
						CITYBANK	21,020	1.5%	3.5x	0.7x							
						LHB	20,953	1.5%	17.9x	3.5x							
						OLYMPIC	20,496	1.5%	18.0x	2.8x							
						ALARABANK	18,282	1.3%	36.9x	0.8x							
						BEACONPHAR	17,838	1.3%	38.5x	5.1x							
						PRIMEBANK	16,142	1.1%	3.9x	0.8x							
						ROBI	14,876	1.1%	16.7x	2.3x							
						UTTARABANK	13,699	1.0%	NM	0.8x							
						NBL	13,055	0.9%	NM	NM							
						BSRMLTD	12,852	0.9%	5.2x	0.6x							
						* 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											
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	1.6	-5.9%	0.5	NM	NM							FINEFOODS	279.0	260.0	5.0	132	36.16
FAREASTFIN	2.0	-4.8%	4.5	NM	NM							BRACBANK	72.5	72.0	2.0	458	33.12
REPUBLIC	34.1	-4.2%	18.8	17.6x	1.8x							MALEKSPIN	35.2	32.0	3.0	677	23.76
CONTININS	27.9	-3.8%	21.4	23.4x	1.2x							GQBALLPEN	420.0	390.0	3.0	53	21.15
CENTRALINS	45.7	-3.8%	40.5	26.9x	0.9x							BSC	122.0	122.0	1.0	97	11.83
PRIMEFIN	2.8	-3.4%	2.7	NM	0.4x							SEAPEARL	53.9	53.9	1.0	130	6.99
SAMATALETH	107.7	-3.4%	32.1	NM	7.5x							PTL	62.6	57.8	2.0	105	6.14
BPML	37.4	-3.4%	40.7	NM	0.6x							ISNLTD	95.2	87.0	6.0	59	5.43
MEGHNA PET	26.1	-3.3%	2.2	NM	0.4x							NATLIFEINS	119.0	119.0	2.0	34	4.08
PARAMOUNT	46.9	-3.1%	12.4	23.6x	1.7x							HAKKANIPUL	85.8	85.8	2.0	47	4.07

* 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
FINEFOODS	279.0	260.0	36.2	132	5
BRACBANK	72.5	72.0	33.1	458	2
MALEKSPIN	35.2	32.0	23.8	677	3
GQBALLPEN	420.0	390.0	21.1	53	3
BSC	122.0	122.0	11.8	97	1
SEAPEARL	53.9	53.9	7.0	130	1
PTL	62.6	57.8	6.1	105	2
ISNLTD	95.2	87.0	5.4	59	6
NATLIFEINS	119.0	119.0	4.1	34	2
HAKKANIPUL	85.8	85.8	4.1	47	2
CITYGENINS	58.0	55.5	3.8	66	2
SIMTEX	20.1	20.1	3.8	187	2
DSSL	11.6	11.6	3.5	300	1
AL-HAJTEX	163.5	163.5	3.3	20	3
CENTRALINS	47.5	47.5	3.1	65	1
BEACONPHAR	151.5	125.0	3.1	21	2
TILIL	76.0	69.5	2.8	38	2
OIMEX	25.6	25.2	2.8	109	2
SPCERAMICS	22.1	22.1	2.8	125	1
SHEPHERD	20.1	18.5	2.7	135	3
PROVATIINS	38.1	38.1	2.4	64	1
CLICL	52.6	52.5	2.4	45	2
Total			203.8		65

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
PREMIERBAN		0.0%	0.0%	Record Date	17-Sep-25
ISLAMIBANK		0.0%	0.0%	Record Date	23-Sep-25

Important DSE News
PREMIERBAN

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 13.10.2025; Time: 11:00 AM; Venue: Digital Platform: <https://premierbank.bdvirtualagm.com>. Record Date: 17.09.2025. The Company has also reported Consolidated EPS of Tk. 1.09, Consolidated NAV per share of Tk. 21.73 and Consolidated NOCFPS of Tk. (4.55) for the year ended December 31, 2024 as against Tk. 3.37, Tk. 22.08 and Tk. (4.89) respectively for the year ended December 31, 2023.

(Q1 Un-audited): Consolidated EPS was Tk. 0.23 for January-March 2025 as against Tk. 0.64 for January-March 2024. Consolidated NOCFPS was Tk. (13.61) for January-March 2025 as against Tk. (16.40) for January-March 2024. Consolidated NAV per share was Tk. 21.95 as on March 31, 2025 and Tk. 22.71 as on March 31, 2024.

(Q2 Un-audited): Consolidated EPS was Tk. (1.33) for April-June 2025 as against Tk. 0.94 for April-June 2024; Consolidated EPS was Tk. (1.11) for January-June 2025 as against Tk. 1.58 for January-June 2024. Consolidated NOCFPS was Tk. (7.64) for January-June 2025 as against Tk. 3.13 for January-June 2024. Consolidated NAV per share was Tk. 20.53 as on June 30, 2025 and Tk. 22.32 as on June 30, 2024.

PADMALIFE

(Q2 Un-audited): As per life revenue account of the company for April to June, 2025, excess of total expenses including claims over total income (deficit) was BDT 60.17 million as against excess of total expenses including claims over total income (deficit) of BDT 49.35 million in the corresponding previous period of 2024. Whereas as per life revenue account of the company for January to June, 2025, excess of total expenses including claims over total income (deficit) was BDT 145.77 million as against excess of total expenses including claims over total income (deficit) of BDT 115.78 million in the corresponding previous period of 2024. Accordingly, Balance of Life Insurance Fund was BDT (3,077.14) million as on June 30, 2025 as against BDT (2,725.76) million as on June 30, 2024.

CONFIDCEM

Refer to their earlier news disseminated by DSE on 15.07.2025 regarding reconsideration of Rights Issue Proposal, Bangladesh Securities and Exchange Commission has informed the company that under the Securities and Exchange Commission (Rights Issue) Rules, 2006, there is no provision for review or reconsideration of rejected rights issue applications. Accordingly, the commission has informed the company that their application cannot be reviewed or reconsidered.

ISLAMIBANK

The company has informed that the Board of Directors of the company in its Meeting held on 14.08.2025 appointed Mr. Md. Habibur Rahman, Senior Executive Vice President as Company Secretary of the company.

NTC

The company has informed that Mr. Mamun Rashid, an Independent Director and Chairman of the Board of Directors of National Tea Company Ltd., has intended to purchase 250,000 shares of the company from the unsubscribed portion of Shares offered by the company.

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