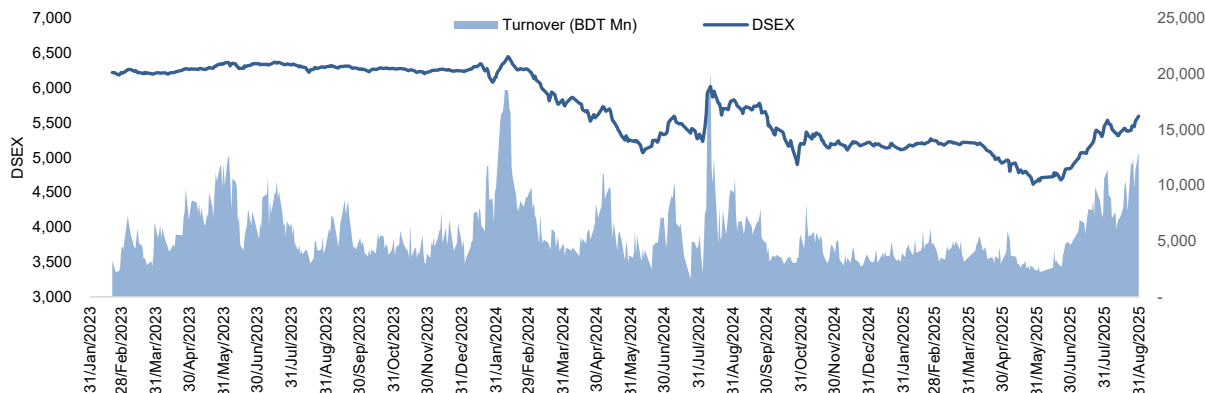


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.39%) gained 76.45 points and closed at 5,594.39. The blue-chip index DS30 (+1.70%), the Shariah-based index DSES (+1.70%), and the large-cap index CDSET (+1.79%) closed at 2,193.72, 1,227.71, and 1,142.88 points, respectively. All of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 4.44% followed by Food & Allied (+2.21%), Telecommunication (+2.15%), Bank (+1.89%), Fuel & Power (+0.56%), Pharmaceutical (+0.47%), and NBFi (+0.10%), respectively. Block trades contributed 2.8% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+9.1%) was the most traded share with a turnover of BDT 360 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,594.39	5,517.95	+76.45	+1.39%	+7.2%
DS30	2,193.72	2,156.99	+36.73	+1.70%	+13.1%
DSES	1,227.71	1,207.20	+20.50	+1.70%	+5.0%
CDSET	1,142.88	1,122.79	+20.09	+1.79%	+7.2%

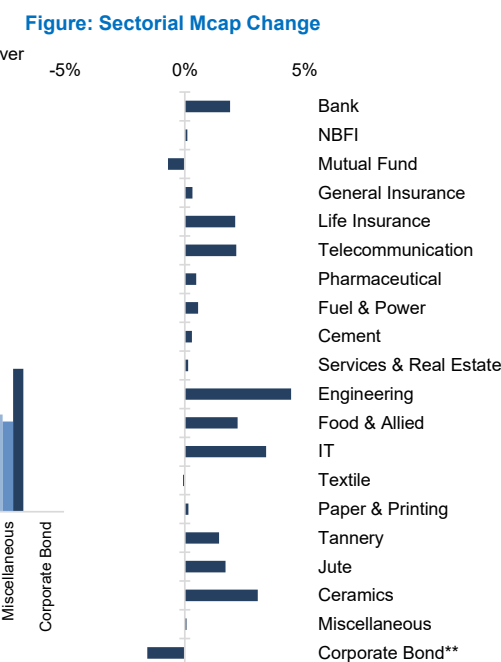
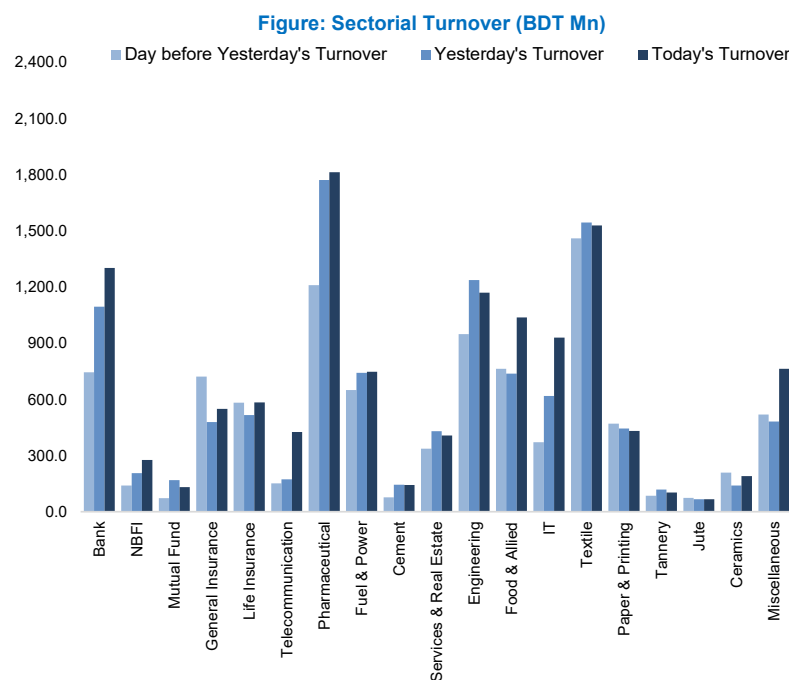
	Advanced	Declined	Unchanged	Total
All Category	201	141	56	398
A Category (Equity)	105	83	31	219
B Category (Equity)	38	33	12	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	58	25	13	96
Mutual Funds	7	17	12	36
Corporate Bonds	0	1	1	2
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,280,488	7,183,560	+1.3%
	Mn USD	59,849	59,052	
Turnover	Mn BDT	12,964	11,323	+14.5%
	Mn USD	107	93	
Volume	Mn Shares	404	376	+7.5%
No. of Trade		325,932	298,772	+9.1%

* Average Interbank Exchange Rate is BDT 121.65 as of Aug 31, 2025

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Market PE 16.5x

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	1,552	1,523	+28.85	+1.89%	36	734,118	10.1%	1,301.4	10.3%	NM	0.8x	GP	419,133	11.1%	49.6	14.2x	7.4x
NBFI	1,094	1,093	+1.12	+0.10%	23	104,279	1.4%	275.9	2.2%	NM	NM	SQURPHARMA	198,654	5.3%	53.6	8.5x	1.5x
Mutual Fund	566	570	-4.01	-0.70%	37	27,114	0.4%	131.3	1.0%	NM	0.5x	BATBC	160,758	4.3%	75.6	13.0x	3.0x
General Insurance	2,959	2,950	+9.46	+0.32%	43	84,455	1.2%	549.7	4.4%	14.2x	1.3x	BRACBANK	152,306	4.0%	278.4	10.8x	1.8x
Life Insurance	2,122	2,078	+43.81	+2.11%	15	56,434	0.8%	584.2	4.6%	NM	NM	ROBI	150,852	4.0%	327.0	17.3x	2.3x
Telecommunication	5,097	4,990	+107.03	+2.15%	3	597,649	8.2%	425.9	3.4%	15.2x	4.3x	WALTONHIL	148,586	3.9%	56.1	11.5x	1.3x
Pharmaceutical	3,242	3,226	+15.30	+0.47%	34	614,576	8.4%	1,812.2	14.4%	14.1x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,210	1,204	+6.72	+0.56%	23	320,654	4.4%	746.8	5.9%	20.3x	0.7x	MARICO	91,942	2.4%	5.7	15.0x	27.6x
Cement	2,154	2,147	+6.49	+0.30%	7	102,646	1.4%	143.5	1.1%	23.7x	2.3x	UPGDCL	85,795	2.3%	23.9	7.4x	2.0x
Services & Real Estate	1,107	1,105	+1.49	+0.13%	9	60,856	0.8%	407.0	3.2%	28.0x	0.5x	BERGERPBL	72,574	1.9%	23.9	20.7x	4.2x
Engineering	2,685	2,571	+114.23	+4.44%	42	302,944	4.2%	1,169.7	9.3%	14.3x	0.9x	LHB	67,011	1.8%	50.8	17.9x	3.5x
Food & Allied	15,417	15,084	+333.25	+2.21%	21	282,085	3.9%	1,036.8	8.2%	21.4x	4.5x	RENATA	60,617	1.6%	122.1	21.5x	1.7x
IT	2,115	2,045	+69.47	+3.40%	11	27,896	0.4%	929.4	7.4%	23.5x	1.8x	BXPHARMA	57,995	1.5%	143.7	9.1x	1.2x
Textile	1,242	1,243	-0.84	-0.07%	58	129,395	1.8%	1,528.4	12.1%	NM	0.9x	UNILEVERCL	47,594	1.3%	0.7	74.9x	26.1x
Paper & Printing	5,719	5,711	+8.35	+0.15%	6	25,837	0.4%	431.4	3.4%	NM	1.2x	ICB	45,097	1.2%	16.9	NM	1.1x
Tannery	2,135	2,105	+30.18	+1.43%	6	23,789	0.3%	103.2	0.8%	NM	1.8x	DUTCHBANGL	40,988	1.1%	21.2	10.9x	0.8x
Jute	14,247	14,008	+238.86	+1.71%	3	3,136	0.0%	66.2	0.5%	NM	NM	EBL	40,853	1.1%	32.0	5.8x	0.9x
Ceramics	433	420	+12.82	+3.05%	5	19,428	0.3%	190.4	1.5%	NM	1.3x	PUBALIBANK	38,653	1.0%	36.3	5.3x	0.7x
Miscellaneous	4,142	4,139	+3.15	+0.08%	15	224,915	3.1%	762.9	6.1%	89.1x	1.8x	CITYBANK	38,639	1.0%	258.0	3.6x	0.7x
Corporate Bond**	16,161	16,418	-256.36	-1.56%	16	35,680	0.5%	0.5	0.0%	NM	NM	OLYMPIC	33,970	0.9%	71.0	18.4x	2.8x
Treasury Bond**	2,262	2,233	+29.51	+1.32%	235	3,509,764	48.2%	0.7	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
ETL	11.0	+10.0%	99.9	42.2x	0.9x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	LOVELLO	103.3	+9.1%	360.1	46.6x	8.2x
NTC	214.5	+10.0%	11.5	NM	NM	ISLAMIBANK	74,730	5.3%	63.8x	1.0x	ROBI	28.8	+4.0%	327.0	17.3x	2.3x
BAYLEASING	4.4	+10.0%	0.7	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	76.5	+7.1%	278.4	10.8x	1.8x
SHYAMPSUG	165.7	+10.0%	12.2	NM	NM	BATBC	50,233	3.6%	13.0x	3.0x	CITYBANK	25.4	+0.4%	258.0	3.6x	0.7x
ORIONPHARM	39.8	+9.9%	163.3	NM	0.4x	WALTONHIL	46,773	3.3%	11.5x	1.3x	ORIONINFU	535.0	+2.9%	232.0	NM	34.1x
RAHIMAFOOD	152.6	+9.94%	116.9	NM	16.6x	BRACBANK	46,489	3.3%	10.8x	1.8x	SINOBANGLA	58.1	+8.2%	219.9	45.6x	2.2x
INTECH	31.0	+9.9%	40.0	NM	NM	GP	44,708	3.2%	14.2x	7.4x	BSC	119.2	-0.8%	206.2	6.1x	1.2x
AAMRATECH	14.4	+9.9%	3.5	NM	0.7x	RENATA	32,968	2.3%	21.5x	1.7x	AGNISYSL	27.9	+3.0%	202.9	21.0x	1.6x
AAMRANET	21.1	+9.9%	36.7	NM	0.9x	BXPHARMA	23,409	1.7%	9.1x	1.2x	SONALIPAPR	281.8	+0.4%	199.2	27.3x	1.7x
SAIFPOWER	6.7	+9.8%	9.2	9.6x	0.4x	PUBALIBANK	22,905	1.6%	5.3x	0.7x	KBPPWBIL	120.1	+2.6%	185.1	NM	10.0x
						CITYBANK	21,020	1.5%	3.6x	0.7x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	17.9x	3.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PLFSL	1.4	-6.7%	4.3	NM	NM	OLYMPIC	20,496	1.5%	18.4x	2.8x	ORIONINFU	520.0	500.0	6.0	170	86.10
SAFKOSPINN	15.5	-6.1%	7.6	NM	NM	ALARABANK	18,282	1.3%	37.5x	0.8x	PTL	58.2	56.9	14.0	1,030	59.72
PREMIERBAN	6.4	-5.9%	21.2	NM	0.3x	BEACONPHAR	17,838	1.3%	37.2x	5.0x	BRACBANK	76.0	71.4	3.0	754	55.33
FAREASTFIN	1.9	-5.0%	2.8	NM	NM	PRIMEBANK	16,142	1.1%	3.9x	0.8x	FINEFOODS	280.0	272.0	11.0	148	41.33
EBL1STMF	4.2	-4.5%	2.4	NM	0.5x	UTTARABANK	13,699	1.0%	NM	0.8x	LEGACYFOOT	72.3	71.9	9.0	417	30.09
CAPITECGBF	7.0	-4.1%	15.2	NM	0.7x	NBL	13,055	0.9%	NM	NM	SEAPEARL	61.9	60.6	2.0	490	30.02
ICBIBANK	2.5	-3.8%	0.7	NM	NM	BSRMLTD	12,852	0.9%	5.2x	0.6x	TILIL	80.0	75.0	6.0	145	11.31
SEMLFBSLGF	5.0	-3.8%	1.1	NM	0.5x											
CAPMIBBLMF	7.7	-3.8%	1.4	NM	0.9x											
KPPL	16.4	-3.5%	9.6	NM	NM											
* 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																

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** 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
ORIONINFU	520.0	500.0	86.1	170	6
PTL	58.2	56.9	59.7	1,030	14
BRACBANK	76.0	71.4	55.3	754	3
FINEFOODS	280.0	272.0	41.3	148	11
LEGACYFOOT	72.3	71.9	30.1	417	9
SEAPEARL	61.9	60.6	30.0	490	2
TILIL	80.0	75.0	11.3	145	6
AIL	63.9	63.9	9.3	145	1
CITYGENINS	58.0	56.0	5.7	101	4
MONNOFABR	17.8	17.8	5.3	300	1
SIMTEX	20.4	19.8	4.4	222	6
EXIM1STMF	4.7	4.4	4.2	951	3
RELIANCE1	15.5	15.0	3.5	224	4
DBH1STMF	6.3	6.3	3.2	500	1
INTRACO	23.7	23.7	2.4	100	1
ENVOYTEX	55.5	55.5	2.3	41	2
LOVELLO	104.0	97.0	1.6	16	2
AL-HAJTEX	151.0	151.0	1.5	10	1
AOL	16.4	16.4	1.5	90	2
GP	305.0	305.0	1.3	4	1
BEXIMCO	99.6	99.6	0.8	9	1
EHL	92.7	92.7	0.8	9	1
Total			366.7		91

Important DSE News
HAMI

The company has informed that it has entered into an agreement with SWIFT NEXUS CORPORATION to rent out the 2,350 sft. of space (partial) out of 35,000 sft. total spare of the factory situated in 49/A, Sagarika Road, Fouzderhat Heavy I/A, Pahartali, Chattagram- 4217 for Eight months. The rent would be Taka 20.00 (Taka Twenty per sft.) with effect from September 01, 2025.

ETL

The company has informed that the Board of Directors of the company in its meeting held on 30 August 2025 has taken a decision to purchase/import a brand new Capital Machineries in order to increase the production of Denim Fabrics. The List of Machineries as under: A. Contineous Denim Dyeing Sizing Machine with Standard Accessories, Quantity: 1 Set B. Highspeed Warping Machine with Standard Accessories, Quantity: 1 SET. Brand/Origin: Panon/Taiwan. Total Value including Freight charges: USD 1,200,000. Exchange Rate as on 30.08.2025: 121.86. Value in BDT: 146,232,000.

SHAHJABANK

Mr. Akkas Uddin Mollah, one of the Sponsors of the Company, has further informed that he has completed his sell of 2,10,25,364 shares of the Company at prevailing market price (In the Block Market) through Chittagong Stock Exchange PLC (CSE) as per declaration disseminated by CSE on 25.08.2025

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

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