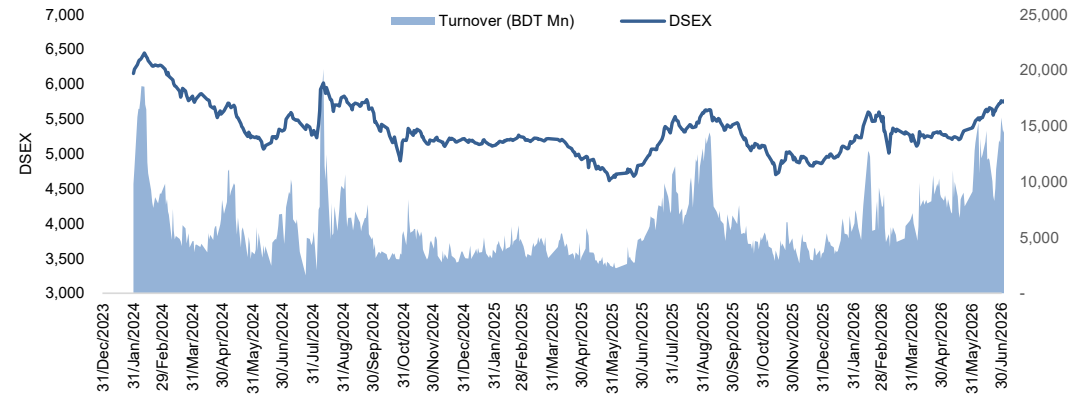


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.41%) lost 23.93 points and closed at 5,859.98. The blue-chip index DS30 (-0.39%), the Shariah-based index DSES (-0.49%), and the large-cap index CDSET (-0.21%) closed at 2,184.22, 1,171.37, and 1,151.61 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.13% followed by Food & Allied (-0.88%), NBFI (-0.60%), Pharmaceutical (-0.36%), Fuel & Power (-0.34%), Bank (-0.17%), and Telecommunication (+0.16%), respectively. Block trades contributed 4.9% of the overall market turnover. Malek Spinning Mills PLC. (+1.8%) was the most traded share with a turnover of BDT 314 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,859.98	5,883.91	-23.93	-0.41%	+20.4%
DS30	2,184.22	2,192.73	-8.51	-0.39%	+17.8%
DSES	1,171.37	1,177.15	-5.78	-0.49%	+17.1%
CDSET	1,151.61	1,153.99	-2.38	-0.21%	+14.6%

	Advanced	Declined	Unchanged	Total
All Category	102	247	41	390
A Category (Equity)	59	125	15	199
B Category (Equity)	10	62	1	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	33	60	25	118
Mutual Funds	6	24	4	34
Corporate Bonds	1	1	0	2
Treasury Bonds	0	5	0	5

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,082,499	7,076,155	+0.1%
	Mn USD	57,444	57,392	
Turnover	Mn BDT	11,308	9,257	+22.2%
	Mn USD	92	75	
Volume	Mn Shares	362	299	+21.1%
No. of Trade		281,665	239,663	+17.5%

* Average Interbank Exchange Rate is BDT 123.29 as of Aug 13, 2026

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Tasviha Taher Trishila Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

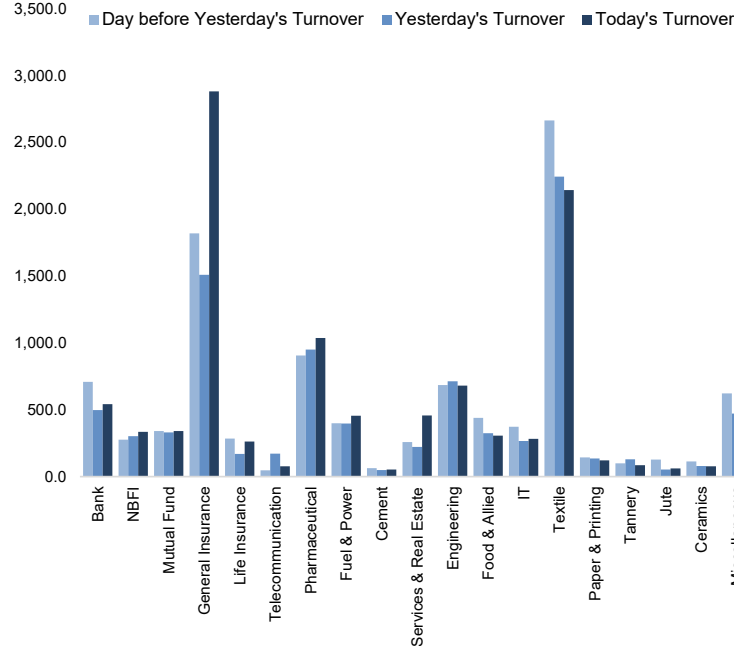
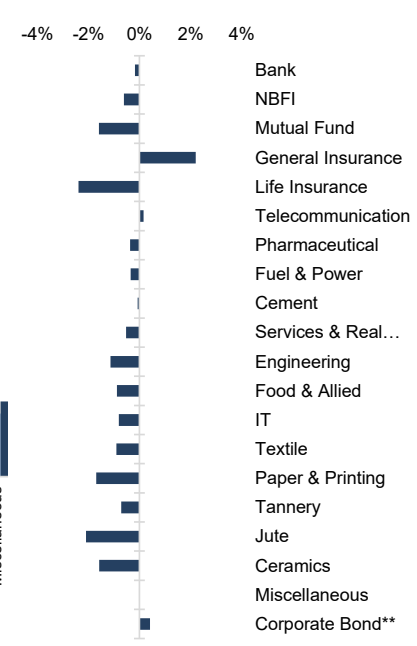


Figure: Sectorial Mcap Change



Market PE 13.8x

Market PB 1.7x

* Market P/E and P/BV calculation excludes
Mutual Fund, Life Insurance, selected NBFIs and Banks

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	1,579	1,582	-2.75	-0.17%	36	767,961	10.8%	541.8	5.0%	7.6x	0.8x	GP	340,276	9.2%	37.2	9.6x	6.1x
NBFI	1,189	1,196	-7.21	-0.60%	23	113,071	1.6%	335.0	3.1%	NM	1.2x	SQURPHARMA	193,512	5.2%	56.1	7.5x	1.3x
Mutual Fund	687	698	-11.10	-1.59%	34	31,973	0.5%	340.8	3.2%	NM	0.6x	ROBI	165,519	4.5%	33.0	15.8x	2.5x
General Insurance	4,770	4,667	+103.02	+2.21%	43	134,766	1.9%	2,879.4	26.8%	19.9x	1.8x	BRACBANK	146,303	4.0%	106.5	6.4x	1.3x
Life Insurance	1,844	1,889	-45.05	-2.38%	15	51,983	0.7%	261.5	2.4%	NM	NM	BATBC	132,300	3.6%	29.8	22.7x	2.3x
Telecommunication	4,609	4,602	+7.53	+0.16%	3	534,841	7.5%	76.3	0.7%	11.1x	3.8x	WALTONHIL	129,956	3.5%	8.8	12.9x	1.1x
Pharmaceutical	3,189	3,200	-11.56	-0.36%	34	601,897	8.5%	1,036.2	9.6%	11.0x	1.5x	MARICO	85,803	2.3%	6.5	7.6x	18.6x
Fuel & Power	1,164	1,168	-3.95	-0.34%	23	307,179	4.3%	456.1	4.2%	9.9x	0.6x	BERGERPBL	73,350	2.0%	12.4	15.7x	3.4x
Cement	2,159	2,161	-1.45	-0.07%	7	101,589	1.4%	52.5	0.5%	23.6x	2.3x	UPGDCL	70,491	1.9%	5.9	7.6x	1.5x
Services & Real Estate	1,217	1,224	-6.38	-0.52%	9	66,242	0.9%	457.7	4.3%	27.0x	0.5x	LHB	66,663	1.8%	18.3	13.5x	3.6x
Engineering	2,731	2,762	-31.27	-1.13%	42	306,097	4.3%	680.5	6.3%	17.3x	0.9x	PUBALIBANK	62,313	1.7%	32.8	5.2x	0.8x
Food & Allied	13,163	13,280	-117.53	-0.88%	21	240,293	3.4%	306.9	2.9%	35.2x	3.6x	CITYBANK	54,581	1.5%	116.7	3.6x	0.8x
IT	2,627	2,648	-21.50	-0.81%	11	34,783	0.5%	282.5	2.6%	45.2x	2.1x	RENATA	54,034	1.5%	12.2	19.8x	1.5x
Textile	1,523	1,537	-13.91	-0.91%	58	158,409	2.2%	2,141.8	19.9%	NM	1.1x	DUTCHBANGL	49,331	1.3%	18.7	3.8x	0.8x
Paper & Printing	4,886	4,970	-84.07	-1.69%	6	22,885	0.3%	120.6	1.1%	NM	1.5x	ISLAMIBANK	47,495	1.3%	2.4	NM	0.8x
Tannery	2,226	2,242	-15.98	-0.71%	6	25,848	0.4%	84.7	0.8%	NM	1.6x	EBL	39,777	1.1%	19.6	4.4x	0.8x
Jute	14,023	14,323	-299.85	-2.09%	3	3,059	0.0%	60.5	0.6%	NM	1.9x	UNILEVERCL	39,243	1.1%	0.4	64.1x	24.1x
Ceramics	497	505	-7.98	-1.58%	5	22,454	0.3%	76.9	0.7%	NM	1.5x	ICB	38,680	1.0%	3.0	NM	1.5x
Miscellaneous	2,661	2,662	-0.38	-0.01%	15	144,508	2.0%	561.9	5.2%	41.4x	1.1x	PRIMEBANK	36,559	1.0%	16.5	3.9x	0.8x
Corporate Bond**	18,400	18,324	+75.70	+0.41%	16	40,709	0.6%	0.7	0.0%	NM	NM	POWERGRID	35,913	1.0%	4.9	8.9x	0.3x
Treasury Bond**	2,198	2,186	+12.04	+0.55%	232	3,375,738	47.6%	1.3	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
MITHUNKNIT	16.5	+10.0%	4.4	NM	5.2x	SQURPHARMA	108,077	6.9%	7.5x	1.3x	MALEKSPIN	50.3	+1.8%	313.9	8.9x	0.8x
ZAHEENSPIN	6.6	+10.0%	9.4	9.7x	2.1x	BRACBANK	78,755	5.0%	6.4x	1.3x	BEXIMCO	27.4	+1.1%	289.9	NM	0.3x
GLOBALINS	49.2	+9.8%	202.6	23.4x	3.0x	ISLAMIBANK	47,409	3.0%	NM	0.8x	SAMORITA	107.3	+0.2%	228.4	NM	2.2x
ALIF	6.1	+8.9%	27.7	21.8x	0.4x	BXPBARMA	45,976	2.9%	7.6x	1.1x	SIPLC	152.2	+4.0%	217.1	29.9x	5.0x
PDL	6.3	+8.6%	23.8	NM	0.5x	WALTONHIL	42,769	2.7%	12.9x	1.1x	SAIHAMCOT	23.3	+2.2%	203.4	25.6x	0.6x
ARAMIT	220.9	+8.55%	24.3	NM	1.8x	PUBALIBANK	42,454	2.7%	5.2x	0.8x	GLOBALINS	49.2	+9.8%	202.6	23.4x	3.0x
PARAMOUNT	70.0	+8.4%	146.0	25.0x	2x	CITYBANK	38,005	2.4%	3.6x	0.8x	SAIHAMTEX	30.4	+4.5%	199.0	49.0x	0.7x
NURANI	4.2	+7.7%	3.5	NM	0.5x	BATBC	34,993	2.2%	22.7x	2.3x	ASIATICLAB	122.0	+4.1%	194.2	28.0x	2.1x
RAHIMAFOD	88.7	+6.7%	23.0	NM	9.8x	GP	34,028	2.2%	9.6x	6.1x	SHARPIND	40.5	-7.5%	189.8	NM	5.1x
GBBPOWER	16.2	+6.6%	44.3	NM	0.8x	EBL	27,271	1.7%	4.4x	0.8x	IPDC	33.1	+0.3%	187.6	27.8x	1.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	26,320	1.7%	19.8x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FARCHEM	20.5	-8.1%	76.7	NM	0.7x	LHB	24,405	1.6%	13.5x	3.6x	BRACBANK	63.5	63.5	19.0	1,897	120.46
SHARPIND	40.5	-7.5%	189.8	NM	5x	PRIMEBANK	22,838	1.5%	3.9x	0.8x	SIPLC	145.0	140.0	4.0	468	66.18
MLDYEING	15.8	-5.5%	15.0	NM	4.2x	UCB	19,645	1.3%	3.9x	0.6x	GQBALLPEN	530.0	520.0	6.0	103	54.13
YPL	22.3	-5.5%	15.0	NM	4.2x	OLYMPIC	18,668	1.2%	15.7x	2.2x	SAIHAMTEX	30.0	27.5	11.0	1,792	51.68
EBLNRBMF	3.7	-5.1%	13.0	NM	0.4x	UTTARABANK	17,778	1.1%	NM	0.8x	DOMINAGE	79.0	78.2	2.0	592	46.47
JHRML	52.0	-5.1%	48.4	53.1x	1.5x	BEXIMCO	17,288	1.1%	15.8x	2.5x	PRIMEBANK	29.6	29.4	3.0	1,179	34.77
USMANIAGL	63.2	-4.7%	3.0	NM	1.0x	ROBI	16,552	1.1%	20.8x	0.7x	ASIATICLAB	128.0	114.0	6.0	259	31.05
BDTHAIFOOD	22.9	-4.6%	28.2	NM	2.0x	ALARABANK	15,838	1.0%	4.5x	0.6x	ALARABANK	17.2	17.2	2.0	1,300	22.36
PENINSULA	23.1	-4.5%	12.9	62.4x	0.8x	BSRMLTD	15,631	1.0%			CITYGENINS	124.1	123.7	2.0	166	20.55
TILIL	48.5	-4.5%	21.7	18.7x	NM						MLDYEING	18.5	17.0	5.0	1,132	19.52

* Bank and NBFI sector PE calculation methodology has been modified.

** 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
BRACBANK	63.5	63.5	120.5	1,897	19	
SIPLC	145.0	140.0	66.2	468	4	
GQBALLPEN	530.0	520.0	54.1	103	6	
SAIHAMTEX	30.0	27.5	51.7	1,792	11	
DOMINAGE	79.0	78.2	46.5	592	2	
PRIMEBANK	29.6	29.4	34.8	1,179	3	
ASIATICLAB	128.0	114.0	31.1	259	6	
ALARABANK	17.2	17.2	22.4	1,300	2	
CITYGENINS	124.1	123.7	20.5	166	2	
MLDYEING	18.5	17.0	19.5	1,132	5	
ACMELAB	88.0	87.0	10.0	115	4	
KARNAPHULI	57.3	57.0	10.0	175	3	
DAFODILCOM	167.0	167.0	7.4	45	3	
MATINSPINN	64.5	64.5	6.5	100	1	
PHENIXINS	50.0	50.0	5.0	100	1	
SONARGAON	120.0	118.0	4.8	41	2	
RELIANCINS	102.0	102.0	3.6	35	1	
LOVELLO	70.0	68.6	3.0	43	2	
FEKDIL	25.7	25.7	2.5	97	1	
CONFIDCEM	73.0	73.0	2.3	32	1	
STANDARINS	53.0	53.0	2.3	43	1	
ISNLTD	64.4	64.4	2.1	33	1	
Total			552.0		107	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RUPALILIFE		0.0%	12.0%	Record Date	20-Aug-26
PREMIERLEA		0.0%	0.0%	Record Date	23-Aug-26
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26
MIDASFIN		0.0%	0.0%	Record Date	2-Sep-26
GRAMEENS2		0.0%	9.0%	Record Date	2-Sep-26

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.