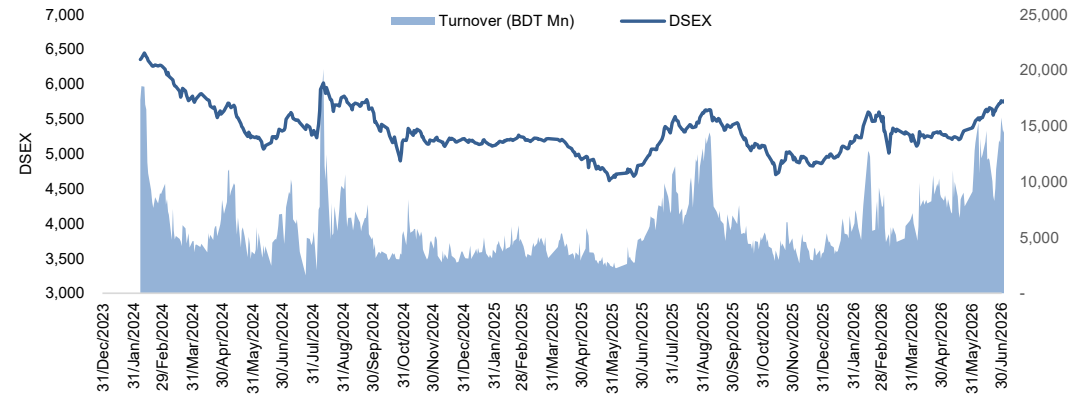


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.10%) lost 63.87 points and closed at 5,722.21. The blue-chip index DS30 (-0.79%), the Shariah-based index DSES (-1.37%), and the large-cap index CDSET (-0.94%) closed at 2,145.48, 1,140.29, and 1,132.94 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.45% followed by Fuel & Power (-1.54%), Telecommunication (-1.02%), Bank (-1.00%), Pharmaceutical (-0.87%), Engineering (-0.72%), and Food & Allied (-0.57%), respectively. Block trades contributed 5.1% of the overall market turnover. Sharp Industries PLC (+7.3%) was the most traded share with a turnover of BDT 365 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,722.21	5,786.08	-63.87	-1.10%	+17.6%
DS30	2,145.48	2,162.52	-17.04	-0.79%	+15.8%
DSES	1,140.29	1,156.12	-15.83	-1.37%	+13.9%
CDSET	1,132.94	1,143.70	-10.76	-0.94%	+12.8%

	Advanced	Declined	Unchanged	Total
All Category	32	324	30	386
A Category (Equity)	12	170	13	195
B Category (Equity)	7	65	2	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	13	89	15	117
Mutual Funds	4	23	7	34
Corporate Bonds	0	1	1	2
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,004,086	7,038,123	-0.5%
	Mn USD	57,229	57,507	
Turnover	Mn BDT	7,111	6,720	+5.8%
	Mn USD	58	55	
Volume	Mn Shares	250	224	+11.6%
No. of Trade		204,263	183,066	+11.6%

* Average Interbank Exchange Rate is BDT 122.39 as of Aug 23, 2026

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Figure: Sectorial Turnover (BDT Mn)

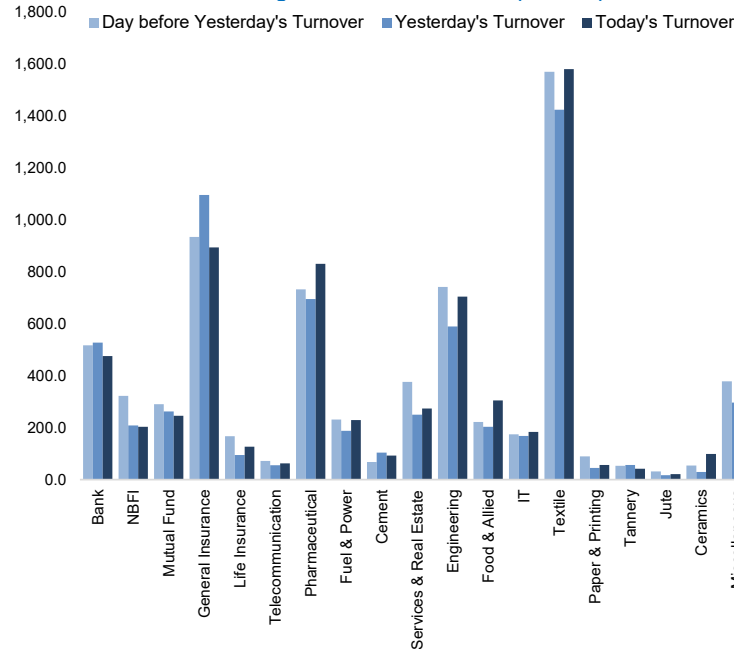
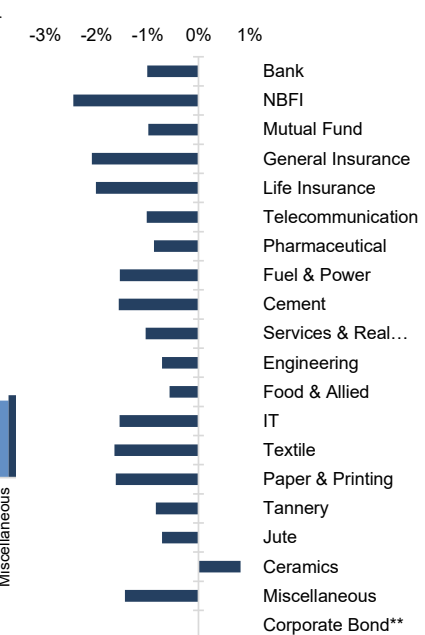


Figure: Sectorial Mcap Change



Market PE 13.5x

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	1,582	1,598	-16.04	-1.00%	36	753,749	10.8%	475.0	7.0%	7.4x	0.8x	GP	331,094	9.2%	24.7	9.4x	5.9x
NBFI	1,139	1,168	-28.62	-2.45%	23	108,332	1.5%	202.7	3.0%	NM	1.2x	SQURPHARMA	193,424	5.4%	57.6	7.5x	1.3x
Mutual Fund	660	666	-6.53	-0.98%	34	30,709	0.4%	245.0	3.6%	NM	0.6x	ROBI	161,852	4.5%	31.6	15.5x	2.5x
General Insurance	4,526	4,623	-96.52	-2.09%	43	127,887	1.8%	892.3	13.2%	18.8x	1.7x	BRACBANK	143,556	4.0%	41.0	6.3x	1.3x
Life Insurance	1,802	1,839	-36.93	-2.01%	15	50,806	0.7%	126.7	1.9%	NM	NM	BATBC	129,438	3.6%	22.7	22.3x	2.2x
Telecommunication	4,496	4,542	-46.11	-1.02%	3	521,694	7.4%	62.9	0.9%	10.8x	3.7x	WALTONHIL	129,423	3.6%	5.4	12.9x	1.1x
Pharmaceutical	3,146	3,174	-27.65	-0.87%	34	593,839	8.5%	830.1	12.3%	10.8x	1.5x	MARICO	85,891	2.4%	5.1	7.6x	18.7x
Fuel & Power	1,131	1,148	-17.68	-1.54%	23	298,489	4.3%	228.6	3.4%	9.6x	0.6x	BERGERPBL	73,625	2.0%	7.3	15.8x	3.4x
Cement	2,056	2,089	-32.65	-1.56%	7	96,733	1.4%	92.0	1.4%	22.4x	2.2x	UPGDCL	69,911	1.9%	2.9	7.5x	1.5x
Services & Real Estate	1,199	1,212	-12.53	-1.03%	9	65,265	0.9%	272.9	4.0%	26.6x	0.5x	BXPBARMA	64,329	1.8%	76.1	7.4x	1.1x
Engineering	2,684	2,703	-19.35	-0.72%	42	300,854	4.3%	703.9	10.4%	17.0x	0.9x	PUBALIBANK	61,532	1.7%	11.6	5.1x	0.8x
Food & Allied	12,908	12,982	-73.73	-0.57%	21	235,647	3.4%	304.3	4.5%	34.5x	3.5x	CITYBANK	53,882	1.5%	55.1	3.5x	0.8x
IT	2,537	2,577	-39.90	-1.55%	11	33,603	0.5%	183.8	2.7%	43.7x	2.1x	RENATA	53,357	1.5%	21.2	19.5x	1.5x
Textile	1,460	1,485	-24.42	-1.65%	58	151,871	2.2%	1,578.1	23.4%	NM	1.0x	DUTCHBANGL	47,199	1.3%	16.3	3.6x	0.8x
Paper & Printing	4,669	4,746	-76.84	-1.62%	6	21,869	0.3%	56.4	0.8%	NM	1.4x	ISLAMIBANK	44,436	1.2%	4.1	NM	0.8x
Tannery	2,170	2,188	-18.23	-0.83%	6	25,199	0.4%	41.9	0.6%	NM	1.6x	EBL	39,284	1.1%	18.8	4.4x	0.8x
Jute	13,565	13,663	-97.53	-0.71%	3	2,959	0.0%	21.2	0.3%	NM	1.8x	UNILEVERCL	39,152	1.1%	0.2	64.0x	24.0x
Ceramics	491	487	+4.02	+0.83%	5	22,189	0.3%	98.4	1.5%	NM	1.5x	ICB	36,598	1.0%	1.3	NM	1.4x
Miscellaneous	2,567	2,604	-37.52	-1.44%	15	139,372	2.0%	317.0	4.7%	39.9x	1.1x	PRIMEBANK	36,193	1.0%	14.2	3.9x	0.8x
Corporate Bond**	18,204	18,204	-0.68	-0.00%	16	40,274	0.6%	0.1	0.0%	NM	NM	BSRMSTEEL	34,926	1.0%	27.3	5.8x	1.0x
Treasury Bond**	2,205	2,200	+4.54	+0.21%	232	3,386,613	48.3%	12.5	0.2%	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
GBBPOWER	14.9	+9.6%	29.4	NM	0.7x	SQURPHARMA	108,027	7.1%	7.5x	1.3x	SHARPIND	36.6	+7.3%	365.4	NM	4.6x
SHARPIND	36.6	+7.3%	365.4	NM	4.6x	BRACBANK	77,276	5.1%	6.3x	1.3x	RUNNERAUTO	53.0	+1.5%	257.2	39.6x	0.8x
EMERALDOIL	30.0	+7.1%	21.3	NM	NM	BXPBARMA	44,947	3.0%	7.4x	1.1x	FARCHEM	19.6	+3.7%	231.7	NM	0.7x
SICL	41.6	+4.0%	140.9	NM	2.8x	ISLAMIBANK	44,356	2.9%	NM	0.8x	SAIHAMTEX	31.3	-	187.3	50.5x	0.7x
TOSRIFA	21.4	+3.9%	9.7	39.6x	0.7x	WALTONHIL	42,593	2.8%	12.9x	1.1x	SICL	41.6	+4.0%	140.9	NM	2.8x
SEAPEARL	38.6	+3.76%	51.8	NM	2.8x	PUBALIBANK	41,922	2.8%	5.1x	0.8x	BEXIMCO	23.7	-4.8%	137.9	NM	0.3x
FARCHEM	19.6	+3.7%	231.7	NM	1x	CITYBANK	37,518	2.5%	3.5x	0.8x	LOVELLO	64.9	+1.7%	130.9	21.2x	4.8x
RAKCEAMIC	31.2	+3.7%	49.4	NM	2.1x	BATBC	34,236	2.2%	22.3x	2.2x	ASIATICLAB	117.2	-3.4%	115.2	26.9x	2.0x
SEMLFBSLGF	6.9	+3.0%	5.8	NM	0.7x	GP	33,109	2.2%	9.4x	5.9x	MALEKSPIN	48.0	-2.6%	111.0	8.5x	0.7x
FBFIF	3.7	+2.8%	10.0	NM	0.4x	EBL	26,933	1.8%	4.4x	0.8x	IPDC	32.5	-3.8%	110.6	27.3x	1.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,990	1.7%	19.5x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NURANI	3.5	-7.9%	4.5	NM	0.4x	LHB	23,002	1.5%	12.8x	3.4x	CITYGENINS	126.3	115.0	5.0	576	72.52
NEWLINE	6.1	-7.6%	2.8	NM	0x	PRIMEBANK	22,610	1.5%	3.9x	0.8x	LOVELLO	70.0	70.0	2.0	1,014	70.98
TUNGHAI	5.1	-6.5%	7.1	NM	NM	UCB	19,438	1.3%	3.8x	0.5x	SHARPIND	34.3	33.0	16.0	2,046	69.01
RINGSHINE	4.3	-6.5%	7.1	NM	NM	OLYMPIC	18,242	1.2%	15.4x	2.2x	ALARABANK	19.5	19.5	2.0	3,194	62.29
RUPALILIFE	79.9	-6.0%	26.7	NM	NM	UTTARABANK	17,694	1.2%	NM	0.8x	BANKASIA	19.0	19.0	1.0	1,050	19.95
SSSTEEL	6.4	-5.9%	3.6	NM	0.3x	ALARABANK	17,207	1.1%	22.6x	0.8x	ASIATICLAB	127.0	121.0	7.0	99	12.08
CNATEX	3.2	-5.9%	3.0	40.0x	NM	ROBI	16,185	1.1%	15.5x	2.5x	SAMORITA	115.0	115.0	1.0	100	11.50
CAPMBDBLMF	8.3	-5.7%	22.7	NM	0.9x	BSRMLTD	15,884	1.0%	4.6x	0.6x	RELIANCINS	118.0	105.0	2.0	76	8.17
AL-HAJTEX	86.4	-5.6%	21.4	NM	6.1x	BEXIMCO	14,953	1.0%	NM	0.3x	IPDC	36.9	36.9	1.0	180	6.64
ARAMITCEM	12.0	-5.5%	0.3	NM	NM						MLDYEING	15.3	15.3	1.0	315	4.82

* 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
CITYGENINS	126.3	115.0	72.5	576	5	
LOVELLO	70.0	70.0	71.0	1,014	2	
SHARPIND	34.3	33.0	69.0	2,046	16	
ALARABANK	19.5	19.5	62.3	3,194	2	
BANKASIA	19.0	19.0	20.0	1,050	1	
ASIATICLAB	127.0	121.0	12.1	99	7	
SAMORITA	115.0	115.0	11.5	100	1	
RELIANCINS	118.0	105.0	8.2	76	2	
IPDC	36.9	36.9	6.6	180	1	
MLDYEING	15.3	15.3	4.8	315	1	
RELIANCE1	14.1	14.1	4.2	300	1	
CAPITECGBF	9.4	9.4	3.8	400	1	
MALEKSPIN	46.7	46.7	2.3	50	1	
PRAGATIINS	80.4	80.4	2.0	25	1	
STANDARINS	55.7	55.7	2.0	36	1	
PREMIERCEM	52.0	52.0	1.7	32	1	
DOMINAGE	63.9	63.9	1.7	26	1	
PROVATIINS	58.0	58.0	1.6	28	1	
TAMIJTEX	143.9	132.3	1.2	9	2	
ASIAPACINS	57.0	57.0	1.1	20	1	
BDFINANCE	14.0	14.0	1.0	70	1	
KARNAPHULI	56.0	56.0	0.9	15	1	
Total			365.6		59	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ICBSONALI1		0.0%	0.0%	Record Date	7-Sep-26
ICBAGRANI1		0.0%	4.0%	Record Date	7-Sep-26
RELIANCE1		0.0%	10.0%	Record Date	7-Sep-26
PRIME1ICBA		0.0%	0.0%	Record Date	7-Sep-26
ICB3RDNRB		0.0%	0.0%	Record Date	7-Sep-26
ICBAMCL2ND		0.0%	0.0%	Record Date	7-Sep-26
IFILISLMF1		0.0%	0.0%	Record Date	7-Sep-26
ICBEPMF1S1		0.0%	0.0%	Record Date	7-Sep-26
PF1STMF		0.0%	0.0%	Record Date	7-Sep-26

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