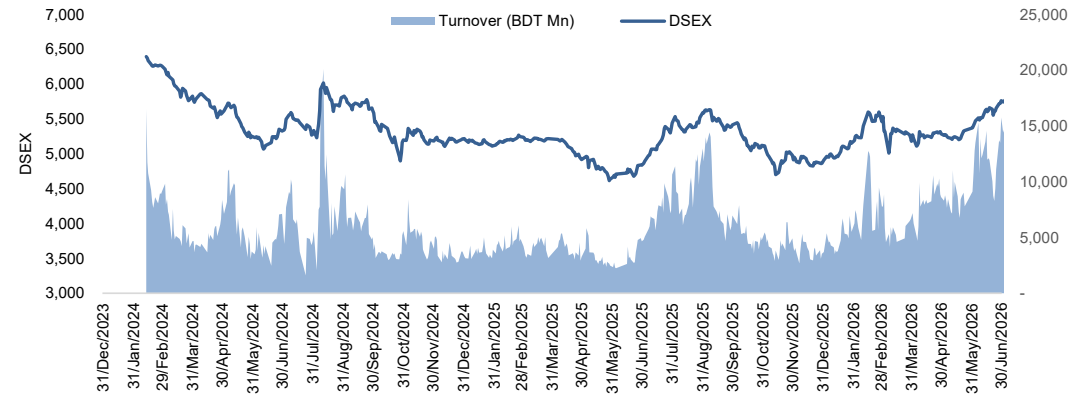


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.73%) lost 41.39 points and closed at 5,614.29. The blue-chip index DS30 (-0.59%), the Shariah-based index DSES (-0.39%), and the large-cap index CDSET (-0.48%) closed at 2,122.23, 1,128.12, and 1,121.77 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.37% followed by NBF1 (-0.75%), Fuel & Power (-0.72%), Bank (-0.67%), Telecommunication (-0.65%), Pharmaceutical (-0.65%), and Engineering (+0.07%), respectively. Block trades contributed 4.7% of the overall market turnover. Saiham Textile Mills Ltd. (+7.6%) was the most traded share with a turnover of BDT 268 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,614.29	5,655.68	-41.39	-0.73%	+15.4%
DS30	2,122.23	2,134.88	-12.66	-0.59%	+14.5%
DSES	1,128.12	1,132.54	-4.42	-0.39%	+12.7%
CDSET	1,121.77	1,127.16	-5.39	-0.48%	+11.6%

	Advanced	Declined	Unchanged	Total
All Category	49	310	33	392
A Category (Equity)	26	163	11	200
B Category (Equity)	12	58	4	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	11	89	18	118
Mutual Funds	1	29	4	34
Corporate Bonds	0	2	1	3
Treasury Bonds	2	3	0	5

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,958,409	6,973,182	-0.2%
	Mn USD	56,414	56,534	
Turnover	Mn BDT	5,180	4,670	+10.9%
	Mn USD	42	38	
Volume	Mn Shares	190	177	+7.0%
No. of Trade		163,315	147,461	+10.8%

* Average Interbank Exchange Rate is BDT 123.34 as of Aug 30, 2026

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Figure: Sectorial Turnover (BDT Mn)

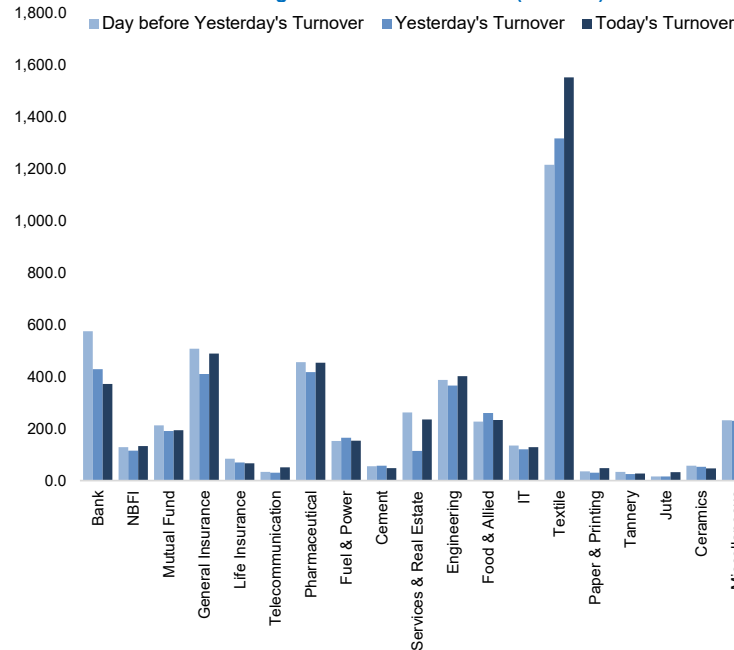
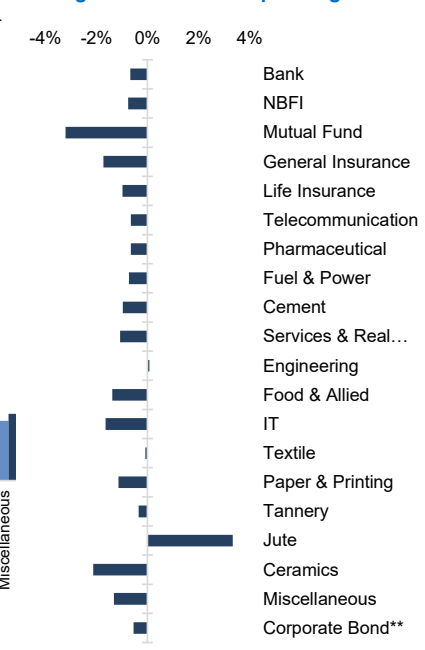


Figure: Sectorial Mcap Change



Market PE 13.2x

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	1,561	1,571	-10.55	-0.67%	36	743,752	10.7%	372.1	7.5%	7.3x	0.7x	GP	329,743	9.3%	10.5	9.3x	5.9x
NBFI	1,114	1,122	-8.47	-0.75%	23	105,911	1.5%	132.6	2.7%	NM	1.1x	SQURPHARMA	192,360	5.4%	52.0	7.4x	1.3x
Mutual Fund	615	636	-20.36	-3.20%	34	28,635	0.4%	194.2	3.9%	NM	0.5x	ROBI	159,757	4.5%	32.8	15.3x	2.4x
General Insurance	4,330	4,406	-76.05	-1.73%	43	122,334	1.8%	488.9	9.9%	18.0x	1.7x	BRACBANK	143,327	4.0%	29.5	6.3x	1.3x
Life Insurance	1,754	1,771	-17.35	-0.98%	15	49,436	0.7%	66.6	1.3%	NM	NM	WALTONHIL	132,989	3.8%	64.6	11.8x	1.0x
Telecommunication	4,462	4,491	-29.31	-0.65%	3	517,706	7.4%	51.1	1.0%	10.7x	3.7x	BATBC	125,658	3.5%	16.3	21.6x	2.2x
Pharmaceutical	3,107	3,127	-20.41	-0.65%	34	586,460	8.4%	453.5	9.2%	10.7x	1.5x	MARICO	85,352	2.4%	12.5	7.6x	18.5x
Fuel & Power	1,109	1,117	-8.08	-0.72%	23	292,781	4.2%	153.6	3.1%	9.4x	0.6x	BERGERPBL	72,996	2.1%	7.1	15.6x	3.4x
Cement	2,006	2,026	-19.56	-0.97%	7	94,381	1.4%	47.9	1.0%	21.9x	2.1x	UPGDCL	67,708	1.9%	4.4	7.3x	1.4x
Services & Real Estate	1,158	1,170	-12.47	-1.07%	9	62,989	0.9%	235.6	4.8%	25.6x	0.5x	BXPBARMA	65,043	1.8%	65.4	7.5x	1.1x
Engineering	2,671	2,669	+1.97	+0.07%	42	299,426	4.3%	401.3	8.1%	15.8x	0.9x	PUBALIBANK	59,658	1.7%	19.5	5.0x	0.8x
Food & Allied	12,581	12,756	-174.80	-1.37%	21	229,670	3.3%	233.1	4.7%	33.6x	3.4x	RENATA	52,829	1.5%	7.9	19.4x	1.4x
IT	2,433	2,474	-40.62	-1.64%	11	32,225	0.5%	128.1	2.6%	41.9x	2.0x	CITYBANK	52,132	1.5%	83.3	3.4x	0.8x
Textile	1,407	1,408	-1.06	-0.07%	58	146,332	2.1%	1,550.8	31.4%	NM	1.0x	DUTCHBANGL	46,692	1.3%	9.1	3.6x	0.8x
Paper & Printing	4,560	4,612	-52.17	-1.13%	6	21,357	0.3%	48.0	1.0%	NM	1.4x	ISLAMIBANK	44,114	1.2%	0.9	NM	0.8x
Tannery	2,121	2,128	-7.38	-0.35%	6	24,626	0.4%	27.5	0.6%	NM	1.5x	EBL	39,284	1.1%	12.0	4.4x	0.8x
Jute	13,664	13,222	+441.59	+3.34%	3	2,980	0.0%	32.3	0.7%	NM	1.9x	UNILEVERCL	38,591	1.1%	1.2	63.0x	23.7x
Ceramics	466	476	-10.11	-2.12%	5	21,050	0.3%	46.9	1.0%	NM	1.4x	ICB	36,598	1.0%	1.1	NM	1.4x
Miscellaneous	2,519	2,552	-33.44	-1.31%	15	136,765	2.0%	257.2	5.2%	39.2x	1.0x	PRIMEBANK	35,584	1.0%	15.0	3.8x	0.7x
Corporate Bond**	18,198	18,298	-99.89	-0.55%	16	40,262	0.6%	0.1	0.0%	NM	NM	POWERGRID	33,902	1.0%	3.1	8.4x	0.2x
Treasury Bond**	2,216	2,208	+7.91	+0.36%	232	3,403,324	48.9%	16.6	0.3%	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
SAIHAMCOT	22.7	+9.7%	167.7	24.9x	0.6x	SQURPHARMA	107,433	7.2%	7.4x	1.3x	SAIHAMTEX	35.5	+7.6%	267.5	57.3x	0.8x
SAIHAMTEX	35.5	+7.6%	267.5	57.3x	0.8x	BRACBANK	77,153	5.2%	6.3x	1.3x	SHARPIND	25.5	-6.3%	212.4	NM	3.2x
PLFSL	2.0	+5.3%	3.6	NM	NM	BXPHARMA	45,446	3.0%	7.5x	1.1x	SAIHAMCOT	22.7	+9.7%	167.7	24.9x	0.6x
SIPLC	151.0	+5.1%	47.5	29.7x	5.0x	ISLAMIBANK	44,034	2.9%	NM	0.8x	PTL	71.2	+1.9%	133.8	11.2x	1.5x
PREMIERLEA	2.3	+4.5%	1.1	NM	NM	WALTONHIL	43,767	2.9%	11.8x	1.0x	SAPORTL	57.1	-4.8%	131.2	26.9x	1.6x
MONNOFABR	21.9	+4.29%	37.9	NM	0.9x	PUBALIBANK	40,645	2.7%	5.0x	0.8x	LOVELLO	53.6	-6.3%	122.6	17.5x	4.0x
SONALIANSH	219.4	+4.0%	31.3	60.8x	1x	CITYBANK	36,300	2.4%	3.4x	0.8x	BEXIMCO	22.7	-3.8%	117.8	NM	0.3x
ARGONDENIM	22.4	+3.2%	60.3	19.5x	0.9x	BATBC	33,237	2.2%	21.6x	2.2x	MALEKSPIN	47.2	+1.3%	103.6	8.3x	0.7x
REGENTTEX	6.5	+3.2%	0.7	NM	0.2x	GP	32,974	2.2%	9.3x	5.9x	MLDYEING	13.2	+0.8%	97.9	NM	1.1x
SEMLIBLSF	7.9	+2.6%	1.4	NM	0.8x	EBL	26,933	1.8%	4.4x	0.8x	IPDC	30.8	-1.9%	86.4	25.9x	1.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,733	1.7%	19.4x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EXIM1STMF	5.6	-8.2%	16.5	NM	0.6x	LHB	22,492	1.5%	12.5x	3.3x	ALARABANK	18.4	18.4	2.0	4,000	73.60
PF1STMF	12.5	-8.1%	34.2	NM	1x	PRIMEBANK	22,229	1.5%	3.8x	0.7x	PUBALIBANK	37.9	37.9	4.0	1,070	40.55
AIBL1STIMF	5.0	-6.9%	2.6	NM	0.6x	UCB	19,025	1.3%	3.8x	0.5x	ASIATICLAB	119.2	102.0	3.0	266	28.93
ICBEPMF1S1	5.4	-6.9%	2.6	NM	0.6x	OLYMPIC	18,204	1.2%	15.3x	2.2x	RELIANCINS	117.8	117.7	2.0	138	16.25
JMISMDL	127.0	-6.8%	3.1	NM	1.5x	UTTARABANK	17,609	1.2%	NM	0.8x	SAIHAMTEX	34.3	29.7	6.0	472	15.97
SICL	36.4	-6.7%	25.8	NM	2.4x	ALARABANK	17,011	1.1%	22.3x	0.8x	FEKDIL	25.5	20.9	3.0	671	15.48
LOVELLO	53.6	-6.3%	122.6	17.5x	4.0x	ROBI	15,976	1.1%	15.3x	2.4x	SONARGAON	112.6	112.6	1.0	100	11.26
SHARPIND	25.5	-6.3%	212.4	NM	3.2x	BSRMLTD	15,600	1.0%	4.5x	0.6x	FINEFOODS	506.0	430.0	2.0	15	7.16
MBL1STMF	7.9	-6.0%	13.1	NM	0.9x	BEACONPHAR	14,448	1.0%	16.5x	3.1x	PTL	68.7	66.5	4.0	105	7.07
CAPITECGBF	8.3	-5.7%	16.5	NM	0.8x						QGBALLPEN	540.0	524.0	2.0	10	5.50

* 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

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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
ALARABANK	18.4	18.4	73.6	4,000	2
PUBALIBANK	37.9	37.9	40.6	1,070	4
ASIATICLAB	119.2	102.0	28.9	266	3
RELIANCINS	117.8	117.7	16.3	138	2
SAIHAMTEX	34.3	29.7	16.0	472	6
FEKDIL	25.5	20.9	15.5	671	3
SONARGAON	112.6	112.6	11.3	100	1
FINEFOODS	506.0	430.0	7.2	15	2
PTL	68.7	66.5	7.1	105	4
GQBALLPEN	540.0	524.0	5.5	10	2
GLOBALINS	46.0	46.0	3.8	84	2
UTTARABANK	18.9	18.9	2.8	150	1
IPDC	34.5	34.5	1.6	46	1
UNITEDINS	67.3	67.3	1.3	20	1
PHOENIXFIN	4.0	4.0	1.3	325	1
CITYGENINS	118.4	118.4	1.2	10	1
ISLAMIINS	55.5	55.5	1.1	20	1
SAMORITA	104.8	104.8	1.0	10	1
AIL	33.0	33.0	1.0	30	1
CENTRALINS	47.0	47.0	0.9	20	1
PRAGATIINS	78.0	78.0	0.8	10	1
IBP	18.7	18.7	0.7	40	1
Total			242.0		47

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MIDASFIN		0.0%	0.0%	Record Date	2-Sep-26
GRAMEENS2		0.0%	9.0%	Record Date	2-Sep-26
ICBSONAL1		0.0%	0.0%	Record Date	7-Sep-26
ICBAGRANI1		0.0%	4.0%	Record Date	7-Sep-26
RELANCE1		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

Important DSE News

WALTONHIL

The Board of Directors has recommended 180% Cash and 10% Stock dividend for the year ended June 30, 2026. Date of AGM: 15.10.2026, Time: 12:00 PM, Venue: Digital Platform. Record Date: 20.09.2026. The Company has also reported EPS of Tk. 33.75, NAV per share of Tk. 381.26 (with revaluation), Tk. 280.24 (without revaluation) and NOCFPS of Tk. 63.72 for the year ended June 30, 2026 as against Tk. 31.11, Tk. 363.40 (with revaluation), Tk. 262.08 (without revaluation) and Tk. 52.91 respectively for the year ended June 30, 2025. Reasons for deviation in EPS and NOCFPS: Earnings Per Share (EPS) of the Company increase to Tk. 33.75 for the Financial Year ended 30 June 2026, compared to Tk. 31.11 for the corresponding period of the previous year. This increase was mainly due to decrease of Finance Costs by Tk. 267.26 crore, representing 2.45% of sales, from Tk. 448.40 crore, or 6.33% of sales, in the preceding year. Net Operating Cash Flows Per Share (NOCFPS) of the Company increased to Tk. 63.72 for the Financial Year ended 30 June 2026, compared to Tk. 52.91 for the corresponding period of the previous year. This significant improvement in NOCFPS of the Company is primarily driven by an increase of Tk. 694.36 Crore (8.84%) in collections from customers and a 2.31% reduction in payments to suppliers during the Financial Year 2025-2026.

MIDASFIN

The company has informed that the Board of Directors in its 399th meeting held on August 27, 2026 at 3:00 p.m. at the MFL Head Office, MIDAS Centre, House # 05, Road # 16 (New), Dhanmondi, Dhaka-1209, has decided to dispose of the following properties of the company at the prevailing market price, subject to approval of the shareholders and concerned regulatory authorities: 1. Property Location: Nahar Green Summit, Holding # 43 (New), 305 (Old), Road # 16 (New), 27 (Old), Dhanmondi, Dhaka-1209. Property Particulars: Commercial Floor Space: (2nd Floor) & 8 Car Parking. 2. Property Location: Excel SM Tower, 62, Zakir Hossain Road, East Nasirabad, Khulsi, Chattagram. Property Particulars: Commercial Floor Space: (1st Floor) & 1 Car Parking. 3. Property Location: Jamil Shopping Center (3rd Floor), Borogola, Bogura, Rangpur Road, Sadar, Bogura. Property Particulars: Commercial Space: (3rd Floor) & 1 Car Parking.

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