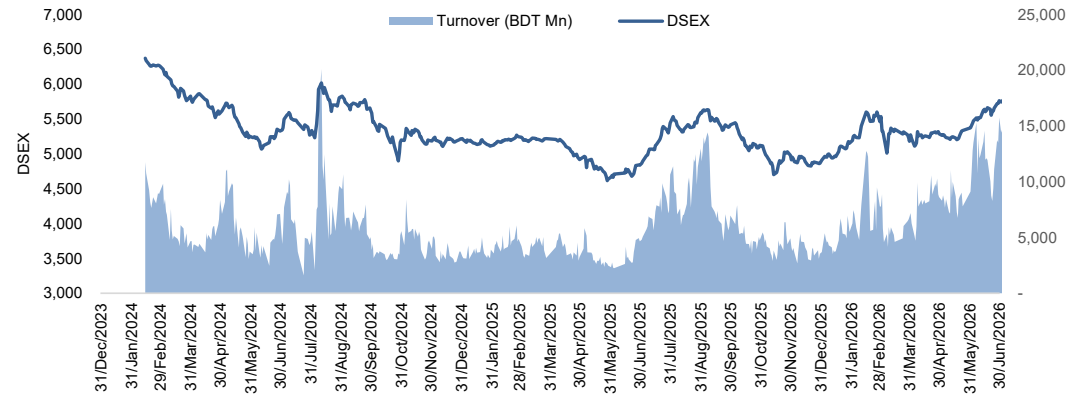


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.29%) lost 16.21 points and closed at 5,598.08. The blue-chip index DS30 (-0.42%), the Shariah-based index DSES (-0.32%), and the large-cap index CDSET (-0.42%) closed at 2,113.24, 1,124.49, and 1,117.02 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.86% followed by Telecommunication (-0.67%), Bank (-0.59%), Pharmaceutical (-0.22%), NBFI (-0.08%), Engineering (+0.05%), and Fuel & Power (+0.14%), respectively. Block trades contributed 5.5% of the overall market turnover. Sharp Industries PLC (-6.3%) was the most traded share with a turnover of BDT 329 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,598.08	5,614.29	-16.21	-0.29%	+15.1%
DS30	2,113.24	2,122.23	-8.99	-0.42%	+14.0%
DSES	1,124.49	1,128.12	-3.63	-0.32%	+12.4%
CDSET	1,117.02	1,121.77	-4.75	-0.42%	+11.2%

	Advanced	Declined	Unchanged	Total
All Category	128	192	69	389
A Category (Equity)	65	108	23	196
B Category (Equity)	32	32	10	74
N Category (Equity)	1	0	0	1
Z Category (Equity)	30	52	36	118
Mutual Funds	16	7	11	34
Corporate Bonds	3	0	1	4
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,947,393	6,958,409	-0.2%
	Mn USD	56,504	56,593	
Turnover	Mn BDT	4,772	5,180	-7.9%
	Mn USD	39	42	
Volume	Mn Shares	178	190	-6.5%
No. of Trade		149,199	163,315	-8.6%

* Average Interbank Exchange Rate is BDT 122.96 as of Aug 31, 2026

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Figure: Sectorial Turnover (BDT Mn)

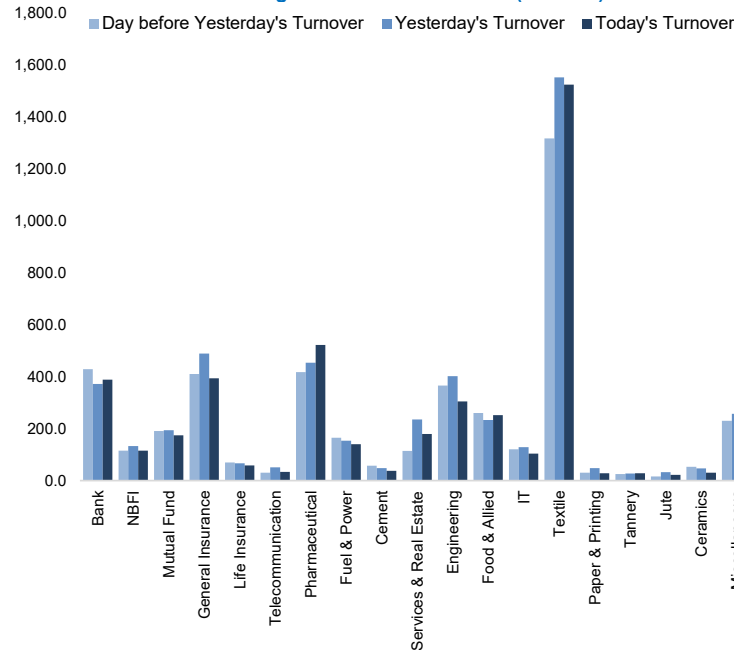
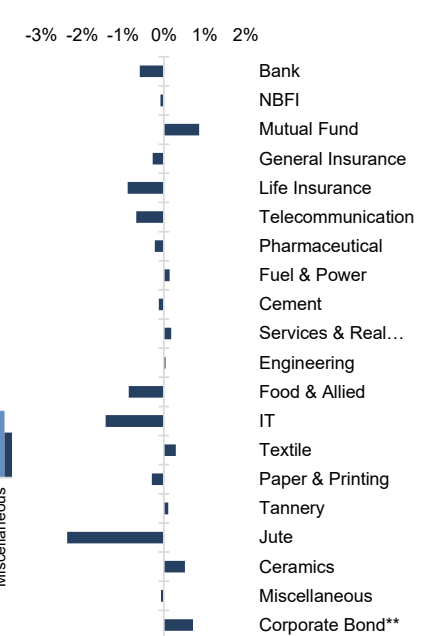


Figure: Sectorial Mcap Change



Market PE 13.2x

Market PB 1.6x

* 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	1,551	1,561	-9.17	-0.59%	36	739,379	10.6%	388.5	8.6%	7.3x	0.7x	GP	327,448	9.3%	14.3	9.3x	5.8x
NBFI	1,113	1,114	-0.94	-0.08%	23	105,822	1.5%	115.1	2.6%	NM	1.1x	SQURPHARMA	192,271	5.4%	76.2	7.4x	1.3x
Mutual Fund	621	615	+5.33	+0.87%	34	28,883	0.4%	174.0	3.9%	NM	0.5x	ROBI	158,709	4.5%	17.1	15.2x	2.4x
General Insurance	4,318	4,330	-11.82	-0.27%	43	122,000	1.8%	393.8	8.7%	18.0x	1.7x	BRACBANK	142,411	4.0%	94.0	6.3x	1.3x
Life Insurance	1,738	1,754	-15.55	-0.89%	15	48,997	0.7%	57.9	1.3%	NM	NM	WALTONHIL	132,655	3.8%	34.4	11.8x	1.0x
Telecommunication	4,431	4,462	-30.10	-0.67%	3	514,213	7.4%	33.4	0.7%	10.6x	3.7x	BATBC	124,308	3.5%	13.9	21.4x	2.1x
Pharmaceutical	3,100	3,107	-6.96	-0.22%	34	585,146	8.4%	521.7	11.6%	10.7x	1.5x	MARICO	85,025	2.4%	11.2	7.6x	18.5x
Fuel & Power	1,111	1,109	+1.59	+0.14%	23	293,201	4.2%	140.5	3.1%	9.4x	0.6x	BERGERPBL	72,922	2.1%	2.8	15.6x	3.4x
Cement	2,004	2,006	-2.39	-0.12%	7	94,269	1.4%	37.5	0.8%	21.9x	2.1x	UPGDCL	67,824	1.9%	2.5	7.3x	1.4x
Services & Real Estate	1,160	1,158	+2.13	+0.18%	9	63,105	0.9%	179.2	4.0%	25.7x	0.5x	BXPBARMA	64,820	1.8%	123.3	7.5x	1.1x
Engineering	2,673	2,671	+1.22	+0.05%	42	299,563	4.3%	304.1	6.7%	15.8x	0.9x	PUBALIBANK	59,033	1.7%	24.0	4.9x	0.8x
Food & Allied	12,473	12,581	-107.85	-0.86%	21	227,701	3.3%	251.4	5.6%	33.4x	3.4x	RENATA	52,760	1.5%	10.8	19.3x	1.4x
IT	2,399	2,433	-34.65	-1.42%	11	31,766	0.5%	104.1	2.3%	41.3x	1.9x	CITYBANK	51,957	1.5%	50.4	3.4x	0.8x
Textile	1,411	1,407	+4.15	+0.29%	58	146,763	2.1%	1,522.9	33.8%	NM	1.0x	DUTCHBANGL	46,184	1.3%	17.3	3.5x	0.7x
Paper & Printing	4,546	4,560	-13.36	-0.29%	6	21,295	0.3%	28.6	0.6%	NM	1.4x	ISLAMIBANK	43,792	1.2%	0.4	NM	0.8x
Tannery	2,123	2,121	+2.23	+0.11%	6	24,652	0.4%	28.8	0.6%	NM	1.5x	EBL	39,120	1.1%	15.3	4.3x	0.8x
Jute	13,341	13,664	-323.20	-2.37%	3	2,910	0.0%	22.4	0.5%	NM	1.8x	UNILEVERCL	38,100	1.1%	1.4	62.2x	23.4x
Ceramics	468	466	+2.40	+0.52%	5	21,159	0.3%	30.7	0.7%	NM	1.4x	ICB	36,512	1.0%	2.2	NM	1.4x
Miscellaneous	2,517	2,519	-1.76	-0.07%	15	136,669	2.0%	173.3	3.8%	39.2x	1.0x	PRIMEBANK	35,340	1.0%	7.4	3.8x	0.7x
Corporate Bond**	18,328	18,198	+130.31	+0.72%	16	40,550	0.6%	0.3	0.0%	NM	NM	POWERGRID	34,542	1.0%	2.1	8.5x	0.3x
Treasury Bond**	2,216	2,216	+0.04	+0.00%	232	3,403,392	49.0%	2.3	0.1%	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
PF1STMF	13.6	+8.8%	25.0	NM	1.5x	SQURPHARMA	107,383	7.2%	7.4x	1.3x	SHARPIND	23.9	-6.3%	328.5	NM	3.0x
ICBEPMF1S1	5.8	+7.4%	1.8	NM	0.7x	BRACBANK	76,660	5.1%	6.3x	1.3x	SAIHAMCOT	23.6	+4.0%	198.9	25.9x	0.6x
GBBPOWER	14.1	+6.8%	15.7	NM	0.7x	BXPBARMA	45,290	3.0%	7.5x	1.1x	SAIHAMTEX	35.2	-0.8%	165.4	56.8x	0.8x
SAFKOSPINN	21.5	+5.9%	9.0	89.6x	NM	ISLAMIBANK	43,713	2.9%	NM	0.8x	BXPBARMA	145.3	-0.3%	123.3	7.5x	1.1x
EXIM1STMF	5.9	+5.4%	10.3	NM	0.6x	WALTONHIL	43,657	2.9%	11.8x	1.0x	PTL	72.4	+1.7%	116.1	11.4x	1.5x
DACCADYE	16.5	+5.10%	2.1	NM	NM	PUBALIBANK	40,219	2.7%	4.9x	0.8x	SAMORITA	102.7	+4.3%	112.3	NM	2.1x
SICL	38.2	+4.9%	26.3	NM	3x	CITYBANK	36,178	2.4%	3.4x	0.8x	FEKDIL	24.3	+3.4%	99.9	NM	1.3x
ENVOYTEX	62.0	+4.7%	70.2	7.5x	1.0x	BATBC	32,879	2.2%	21.4x	2.1x	BRACBANK	62.2	-0.6%	94.0	6.3x	1.3x
SAMORITA	102.7	+4.3%	112.3	NM	2.1x	GP	32,745	2.2%	9.3x	5.8x	LOVELLO	52.5	-2.1%	92.3	17.2x	3.9x
NAHEEACP	32.2	+4.2%	11.8	NM	2.7x	EBL	26,821	1.8%	4.3x	0.8x	MLDYING	13.0	-1.5%	80.3	NM	1.1x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,700	1.7%	19.3x	1.4x						
SHARPIND	23.9	-6.3%	328.5	NM	3.0x	LHB	22,492	1.5%	12.5x	3.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
STANCERAM	65.8	-5.2%	0.6	NM	NM	PRIMEBANK	22,077	1.5%	3.8x	0.7x	ALARABANK	18.4	18.0	2.0	3,200	58.80
PLFSL	1.9	-4.8%	1.0	NM	1.1x	UCB	19,025	1.3%	3.8x	0.5x	IPDC	32.5	32.5	3.0	1,500	48.75
ZAHINTEX	7.9	-4.8%	1.0	NM	1.1x	OLYMPIC	18,192	1.2%	15.3x	2.2x	BRACBANK	62.3	62.3	1.0	500	31.15
TUNGHAI	4.3	-4.4%	1.4	NM	NM	UTTARABANK	17,525	1.2%	NM	0.8x	PTL	78.3	68.0	7.0	269	18.47
PREMIERLEA	2.2	-4.3%	2.0	NM	NM	ALARABANK	16,718	1.1%	21.9x	0.8x	MARICO	2,680.0	2,680.0	6.0	6	15.69
MEGCONMILK	35.2	-4.1%	4.1	NM	NM	ROBI	15,871	1.1%	15.2x	2.4x	MERCANBANK	7.7	7.7	1.0	1,706	13.14
AIBL1STMF	4.8	-4.0%	6.6	NM	0.5x	BSRMLTD	15,647	1.1%	4.5x	0.6x	BANKASIA	18.5	18.5	1.0	600	11.10
DAFODILCOM	154.9	-3.5%	20.0	NM	11.8x	JAMUNABANK	14,326	1.0%	3.6x	0.8x	BATBC	253.0	253.0	1.0	44	11.05
YPL	22.3	-3.5%	5.2	NM	4.2x						SHARPIND	28.0	23.0	5.0	381	9.70
											CITYGENINS	127.1	127.1	1.0	68	8.67

* 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
ALARABANK	18.4	18.0	58.8	3,200	2	
IPDC	32.5	32.5	48.8	1,500	3	
BRACBANK	62.3	62.3	31.2	500	1	
PTL	78.3	68.0	18.5	269	7	
MARICO	2,680.0	2,680.0	15.7	6	6	
MERCANBANK	7.7	7.7	13.1	1,706	1	
BANKASIA	18.5	18.5	11.1	600	1	
BATBC	253.0	253.0	11.1	44	1	
SHARPIND	28.0	23.0	9.7	381	5	
CITYGENINS	127.1	127.1	8.7	68	1	
KARNAPHULI	56.5	52.9	4.4	82	2	
ASIATICLAB	106.0	106.0	4.2	40	1	
JAMUNABANK	25.5	24.1	3.1	128	3	
ANWARGALV	96.0	96.0	2.9	30	1	
LIBRAINFU	643.4	643.4	2.7	4	1	
NBL	3.8	3.8	2.5	650	1	
BDLAMPS	200.0	200.0	2.4	12	2	
SAIHAMTEX	32.0	32.0	1.9	58	1	
PHOENIXFIN	3.8	3.8	1.4	364	1	
MEGCONMILK	39.0	39.0	1.4	35	1	
AIL	37.4	37.0	1.3	35	2	
NORTHRNINS	40.0	40.0	1.3	33	1	
Total			262.1		54	

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
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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