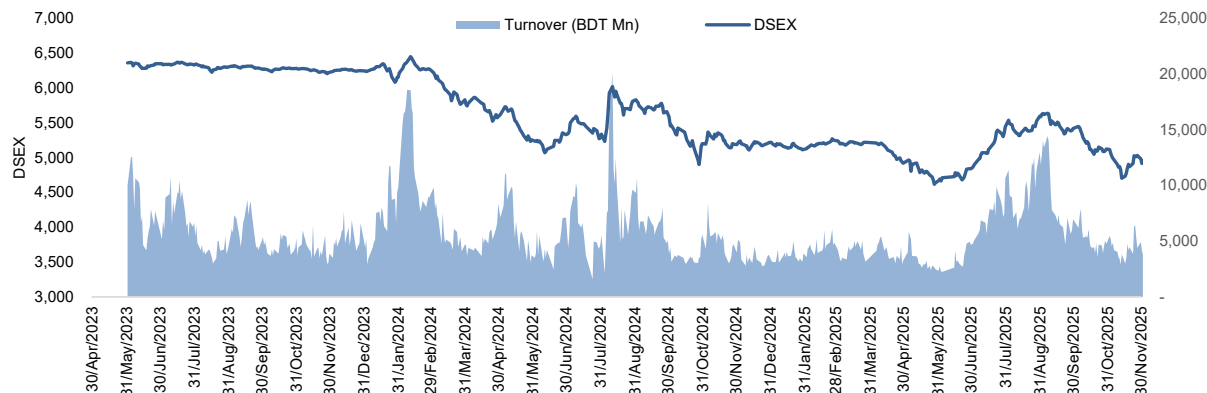


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.74%) gained 36.2 points and closed at 4,950.92. The blue-chip index DS30 (+0.56%), the Shariah-based index DSES (+1.00%), and the large-cap index CDSET (+0.33%) closed at 1,906.28, 1,039.22, and 1,025.77 points, respectively. All large-cap sectors posted positive performance today. Engineering booked the highest gain of 1.38% followed by Food & Allied (+0.65%), Telecommunication (+0.61%), Bank (+0.40%), Fuel & Power (+0.40%), NBFI (+0.37%), and Pharmaceutical (+0.33%), respectively. Block trades contributed 5.4% of the overall market turnover. Orion Infusion Ltd. (-4.9%) was the most traded share with a turnover of BDT 184 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,950.92	4,914.72	+36.20	+0.74%	-5.1%
DS30	1,906.28	1,895.70	+10.58	+0.56%	-1.7%
DSES	1,039.22	1,028.89	+10.33	+1.00%	-11.1%
CDSET	1,025.77	1,022.43	+3.34	+0.33%	-3.8%

	Advanced	Declined	Unchanged	Total
All Category	285	56	47	388
A Category (Equity)	154	31	28	213
B Category (Equity)	71	3	4	78
N Category (Equity)	0	0	0	0
Z Category (Equity)	60	22	15	97
Mutual Funds	19	1	15	35
Corporate Bonds	1	1	0	2
Treasury Bonds	1	1	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,852,329	6,815,562	+0.5%
	Mn USD	56,046	55,746	
Turnover	Mn BDT	3,791	4,159	-8.9%
	Mn USD	31	34	
Volume	Mn Shares	139	153	-8.8%
No. of Trade		139,383	159,864	-12.8%

* Average Interbank Exchange Rate is BDT 122.26 as of Dec 02, 2025

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Figure: Sectorial Turnover (BDT Mn)

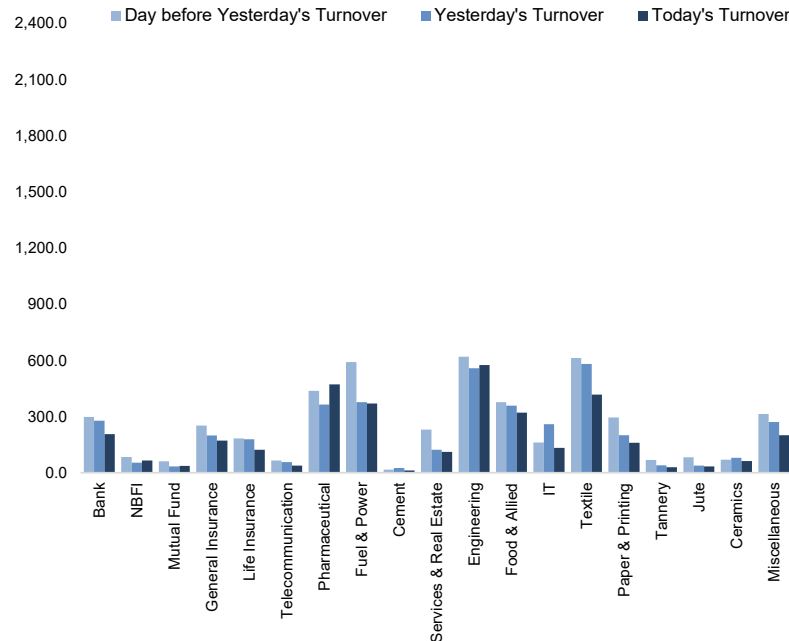
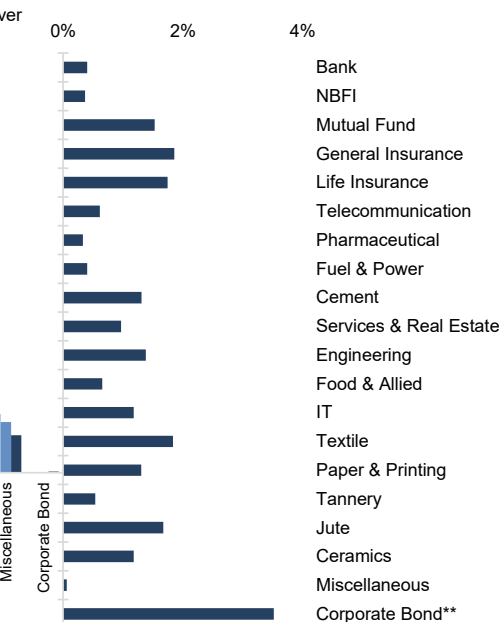


Figure: Sectorial Mcap Change



Market PE 14.0x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, several 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	1,385	1,379	+5.55	+0.40%	36	655,226	9.6%	206.7	5.8%	NM	1.0x	GP	377,679	11.4%	6.2	12.8x	7.6x
NBFI	892	888	+3.27	+0.37%	23	84,967	1.3%	65.6	1.8%	NM	NM	SQURPHARMA	180,925	5.4%	36.8	7.2x	1.2x
Mutual Fund	490	482	+7.38	+1.53%	37	23,475	0.3%	36.8	1.0%	NM	0.5x	ROBI	147,186	4.4%	28.3	16.0x	2.2x
General Insurance	2,805	2,754	+51.19	+1.86%	43	80,044	1.2%	171.8	4.8%	13.2x	1.2x	BATBC	135,486	4.1%	15.3	11.8x	2.4x
Life Insurance	1,661	1,633	+28.50	+1.75%	15	44,186	0.7%	122.4	3.4%	NM	NM	BRACBANK	131,401	4.0%	5.7	8.4x	1.3x
Telecommunication	4,682	4,653	+28.49	+0.61%	3	548,974	8.1%	37.9	1.1%	13.5x	4.1x	WALTONHIL	125,491	3.8%	4.2	11.1x	0.9x
Pharmaceutical	2,836	2,827	+9.34	+0.33%	34	537,744	7.9%	471.1	13.1%	11.6x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,053	1,048	+4.22	+0.40%	23	278,840	4.1%	370.2	10.3%	9.1x	0.6x	MARICO	86,178	2.6%	17.1	13.9x	28.9x
Cement	1,836	1,812	+23.74	+1.31%	7	87,491	1.3%	11.6	0.3%	21.1x	1.9x	UPGDCL	69,737	2.1%	3.9	6.5x	1.5x
Services & Real Estate	979	970	+9.40	+0.97%	9	53,844	0.8%	111.0	3.1%	17.1x	0.4x	BERGERPBL	69,701	2.1%	0.6	21.8x	4.0x
Engineering	2,324	2,293	+31.74	+1.38%	42	261,914	3.9%	575.2	16.0%	13.6x	0.7x	LHB	58,069	1.7%	6.3	14.3x	3.1x
Food & Allied	13,136	13,051	+85.38	+0.65%	21	240,776	3.5%	321.5	9.0%	19.2x	3.6x	BXPBARMA	48,894	1.5%	10.5	7.6x	1.0x
IT	1,733	1,713	+20.26	+1.18%	11	22,861	0.3%	132.9	3.7%	24.1x	1.4x	RENATA	45,947	1.4%	6.4	19.4x	1.3x
Textile	1,055	1,036	+19.02	+1.84%	58	109,883	1.6%	417.8	11.6%	73.0x	0.7x	UNILEVERCL	43,552	1.3%	0.1	60.3x	21.0x
Paper & Printing	4,600	4,541	+59.31	+1.31%	6	20,782	0.3%	160.5	4.5%	NM	1.1x	PUBALIBANK	37,872	1.1%	2.3	6.1x	0.5x
Tannery	1,861	1,851	+9.97	+0.54%	6	21,540	0.3%	28.9	0.8%	NM	1.4x	DUTCHBANGL	37,508	1.1%	9.4	7.6x	0.7x
Jute	12,135	11,935	+199.92	+1.68%	3	2,671	0.0%	33.2	0.9%	NM	NM	CITYBANK	36,509	1.1%	44.1	2.8x	0.6x
Ceramics	381	377	+4.45	+1.18%	5	17,109	0.3%	62.0	1.7%	NM	1.1x	EBL	36,385	1.1%	8.7	4.6x	0.8x
Miscellaneous	3,920	3,918	+2.44	+0.06%	15	213,040	3.1%	199.6	5.6%	99.9x	1.7x	PRIMEBANK	33,193	1.0%	6.1	3.8x	0.7x
Corporate Bond**	16,828	16,256	+572.28	+3.52%	16	37,153	0.5%	6.4	0.2%	NM	NM	ICB	32,349	1.0%	3.6	NM	1.0x
Treasury Bond**	2,262	2,254	+7.54	+0.33%	233	3,448,248	50.8%	43.6	1.2%	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
NURANI	2.2	+10.0%	0.3	NM	0.2x	SQURPHARMA	104,510	7.3%	7.2x	1.2x	ORIONINFU	370.1	-4.9%	184.2	NM	22.3x
ZEALBANGLA	109.5	+9.9%	1.0	NM	NM	BRACBANK	73,520	5.2%	8.4x	1.3x	SPCL	52.7	+2.9%	115.2	14.7x	1.3x
BBSCABLES	15.5	+9.9%	20.5	NM	0.6x	BEXIMCO	69,465	4.9%	NM	1.3x	KBPWPBIL	63.1	+2.4%	113.1	NM	5.2x
BDTHAI	12.3	+9.8%	26.9	NM	0.4x	ISLAMIBANK	62,516	4.4%	NM	0.8x	DOMINAGE	24.8	+0.4%	107.8	NM	1.4x
DESHBANDHU	16.8	+9.8%	22.4	NM	1.2x	WALTONHIL	50,579	3.6%	11.1x	0.9x	SIMTEX	27.7	-0.7%	105.6	27.4x	1.2x
LOVELLO	73.0	+9.77%	98.1	41.6x	5.9x	GP	38,875	2.7%	12.8x	7.6x	LOVELLO	73.0	+9.8%	98.1	41.6x	5.9x
GOLDENSON	11.3	+9.7%	47.2	NM	1x	BATBC	36,336	2.6%	11.8x	2.4x	MONNOFABR	20.9	+5.6%	73.2	NM	0.8x
YPL	17.0	+9.7%	8.5	NM	3.2x	BXPBARMA	34,505	2.4%	7.6x	1.0x	RUNNERAUTO	40.8	+6.5%	61.4	20.4x	0.6x
BDTHAIFOOD	13.9	+9.4%	4.5	NM	1.2x	PUBALIBANK	25,230	1.8%	6.1x	0.5x	SAPORTL	43.7	-1.8%	58.7	16.6x	1.2x
SHARPIND	12.9	+9.3%	2.2	NM	1.3x	CITYBANK	25,210	1.8%	2.8x	0.6x	RAHIMAFOOD	137.4	-1.2%	54.0	NM	14.4x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	19.4x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ILFSL	0.8	-10.0%	0.0	NM	NM	LHB	21,812	1.5%	14.3x	3.1x	CITYGENINS	83.5	69.0	3.0	906	69.16
FAREASTFIN	0.7	-9.9%	0.1	NM	NM	PRIMEBANK	20,145	1.4%	3.8x	0.7x	FINEFOODS	309.0	291.0	5.0	93	28.22
PLFSL	0.7	-9.4%	0.0	NM	NM	OLYMPIC	19,861	1.4%	13.9x	2.1x	FINEFOODS	309.0	291.0	5.0	93	28.22
PREMIERLEA	0.8	-9.4%	0.0	NM	NM	ALARABANK	15,936	1.1%	43.3x	0.8x	BDTHAIFOOD	13.9	13.9	7.0	2,000	27.80
UNIONCAP	2.9	-9.4%	1.1	NM	NM	ROBI	15,347	1.1%	16.0x	2.2x	LOVELLO	68.0	60.0	9.0	258	17.15
BIFC	2.1	-8.7%	0.1	NM	NM	UTTARABANK	14,718	1.0%	NM	0.7x	NATLIFEINS	97.4	97.4	3.0	83	8.06
FASFIN	1.1	-8.3%	0.1	NM	NM	BEACONPHAR	14,601	1.0%	22.3x	3.4x	ACI	188.0	178.8	3.0	27	4.84
FAMILYTEX	1.2	-7.7%	1.3	NM	0.1x	UCB	13,924	1.0%	4.0x	0.4x	SAMORITA	76.7	76.7	1.0	50	3.84
FIRSTFIN	2.4	-7.7%	0.0	NM	NM	BSRMLTD	13,247	0.9%	3.7x	0.5x	SALVOCHEM	31.6	29.0	5.0	97	2.91
ACFL	18.6	-6.5%	1.8	NM	0.6x	* 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					CVOPRL	149.4	149.4	1.0	8	1.23

* 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
CITYGENINS	83.5	69.0	69.2	906	3
FINEFOODS	309.0	291.0	28.2	93	5
FINEFOODS	309.0	291.0	28.2	93	5
BDTHAIFOOD	13.9	13.9	27.8	2,000	7
LOVELLO	68.0	60.0	17.1	258	9
NATLIFEINS	97.4	97.4	8.1	83	3
ACI	188.0	178.8	4.8	27	3
SAMORITA	76.7	76.7	3.8	50	1
SALVOCHEM	31.6	29.0	2.9	97	5
CVOPRL	149.4	149.4	1.2	8	1
BPML	22.5	22.5	1.1	50	1
ORIONINFU	355.0	355.0	1.0	3	1
AL-HAJTEX	131.0	131.0	0.9	7	1
SIMTEX	30.3	30.3	0.8	25	1
ACMEPL	19.3	19.3	0.6	33	1
BEACONPHAR	116.0	116.0	0.6	5	1
SAPORTL	44.2	44.2	0.5	12	1
AMANFEED	25.9	25.9	0.5	20	1
CLICL	46.4	46.4	0.5	11	1
HAKKANIPUL	72.0	72.0	0.5	7	1
MONNOFABR	20.3	20.3	0.5	25	1
Total			203.9		49

Important DSE News
GPHISPAT

The Board of Directors has recommended 5% Cash Dividend (only for General Shareholders except Sponsors and Directors) for the year ended June 30, 2025. The Sponsors and Directors hold 201,247,351 shares out of total 483,883,456 shares of the company and Cash Dividend payable to the General Shareholders is Tk. 141,318,052.50. Date of AGM: 31.12.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 23.12.2025. The Company has reported EPS of Tk. (0.51), NAV per share of Tk. 51.72 and NOCFPS of Tk. 5.78 for the year ended June 30, 2025 as against Tk. 1.77, Tk. 52.43 and Tk. 9.89 respectively for the year ended June 30, 2024.

SALVOCHEM

Dhaka Stock Exchange PLC. (DSE) has approved the proposed trading code change of the Company. Accordingly, the trading code of the Company will be 'SALVO' instead of 'SALVOCHEM' with effect from December 03, 2025. Other information (except trading code) will remain unchanged.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SPCL		0.0%	20.0%	Record Date	3-Dec-25
EGEN		0.0%	2.3%	Record Date	3-Dec-25
TAMIJTEX		10.0%	12.0%	Record Date	3-Dec-25
METROSPIN		0.0%	0.0%	Record Date	3-Dec-25
ANWARGALV		0.0%	0.0%	Record Date	4-Dec-25
COPPERTECH		0.0%	2.2%	Record Date	4-Dec-25
ORIONPHARM		0.0%	0.0%	Record Date	4-Dec-25
RDFOOD		0.0%	1.0%	Record Date	7-Dec-25
PHARMAID		0.0%	30.0%	Record Date	7-Dec-25
JAMUNAOIL		0.0%	180.0%	Record Date	7-Dec-25
INTRACO		0.0%	1.3%	Record Date	8-Dec-25
MPETROLEUM		0.0%	200.0%	Record Date	10-Dec-25
SONALIANS		0.0%	15.0%	Record Date	10-Dec-25
ECABLES		0.0%	0.0%	Record Date	14-Dec-25
BDTHAI		0.0%	0.0%	Record Date	14-Dec-25
SILCOPHL		0.0%	1.1%	Record Date	15-Dec-25
FORTUNE		0.0%	0.5%	Record Date	15-Dec-25

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