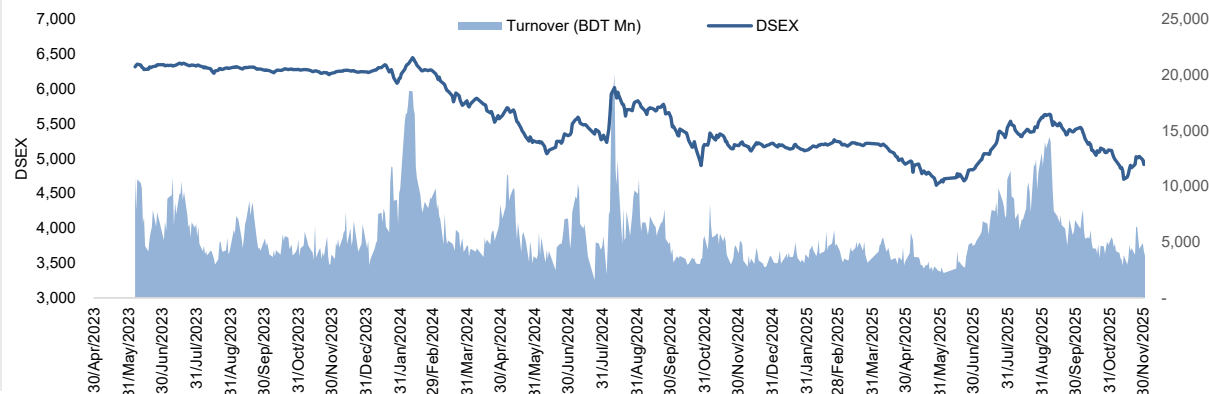


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.28%) lost 13.93 points and closed at 4,872.64. The blue-chip index DS30 (-0.29%), the Shariah-based index DSES (-0.38%), and the large-cap index CDSET (-0.23%) closed at 1,886.12, 1,020.90, and 1,016.76 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.87% followed by Engineering (-0.53%), Pharmaceutical (-0.18%), NBFI (-0.18%), Bank (-0.18%), Telecommunication (-0.10%), and Food & Allied (+0.71%), respectively. Block trades contributed 4.9% of the overall market turnover. Orion Infusion Ltd. (+3.7%) was the most traded share with a turnover of BDT 170 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,872.64	4,886.57	-13.93	-0.28%	-6.6%
DS30	1,886.12	1,891.63	-5.51	-0.29%	-2.8%
DSES	1,020.90	1,024.78	-3.88	-0.38%	-12.7%
CDSET	1,016.76	1,019.07	-2.31	-0.23%	-4.6%

	Advanced	Declined	Unchanged	Total
All Category	110	209	68	387
A Category (Equity)	52	123	38	213
B Category (Equity)	24	44	9	77
N Category (Equity)	0	0	0	0
Z Category (Equity)	34	42	21	97
Mutual Funds	9	11	15	35
Corporate Bonds	1	0	0	1
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,839,831	6,847,620	-0.1%
	Mn USD	55,944	56,008	
Turnover	Mn BDT	2,676	3,644	-26.5%
	Mn USD	22	30	
Volume	Mn Shares	101	145	-30.7%
No. of Trade		114,764	137,821	-16.7%

* Average Interbank Exchange Rate is BDT 122.26 as of Dec 07, 2025

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Figure: Sectorial Turnover (BDT Mn)

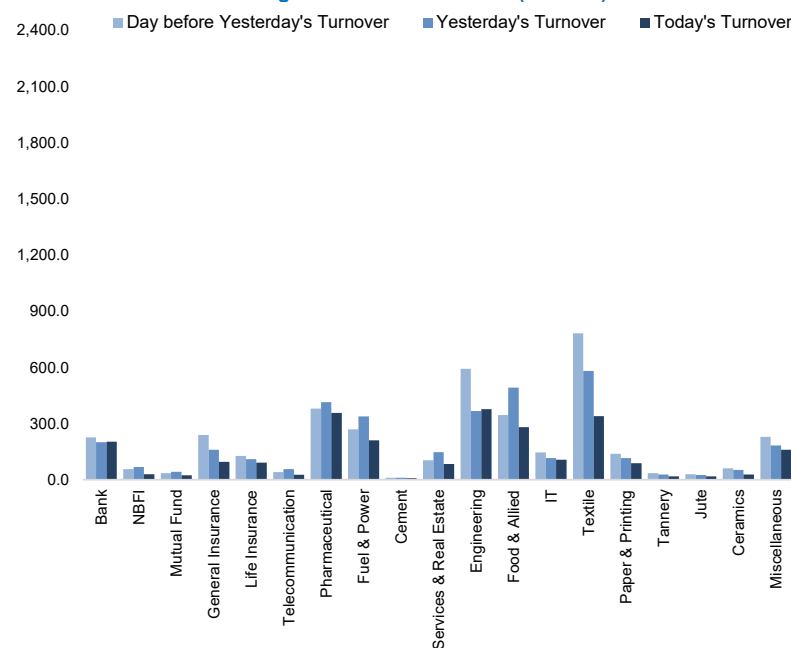
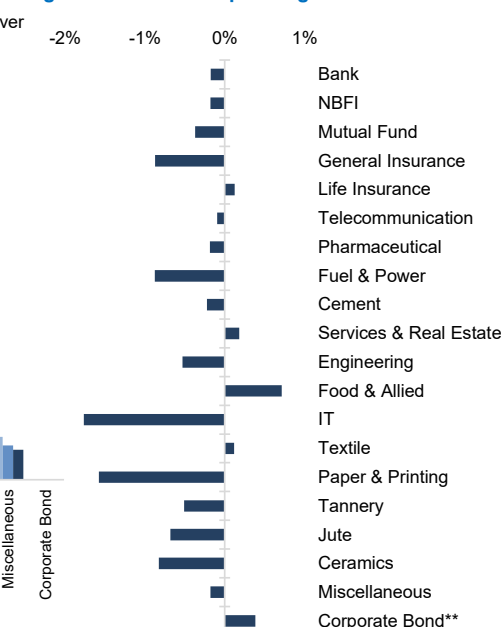


Figure: Sectorial Mcap Change



Market PE 13.8x

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	1,372	1,374	-2.41	-0.18%	36	649,093	9.6%	203.5	8.0%	NM	1.0x	GP	375,653	11.5%	6.5	12.8x	7.6x
NBFI	865	867	-1.55	-0.18%	23	82,463	1.2%	29.6	1.2%	NM	NM	SQURPHARMA	179,152	5.5%	31.4	7.1x	1.2x
Mutual Fund	482	484	-1.80	-0.37%	37	23,101	0.3%	24.1	0.9%	NM	0.4x	ROBI	146,138	4.5%	15.3	15.9x	2.2x
General Insurance	2,726	2,750	-23.99	-0.87%	43	77,801	1.2%	95.2	3.7%	12.9x	1.1x	BATBC	133,866	4.1%	12.5	11.6x	2.4x
Life Insurance	1,620	1,618	+2.00	+0.12%	15	43,098	0.6%	90.5	3.6%	NM	NM	BRACBANK	130,605	4.0%	10.1	8.3x	1.3x
Telecommunication	4,653	4,657	-4.43	-0.10%	3	545,583	8.1%	26.0	1.0%	13.4x	4.1x	WALTONHIL	124,291	3.8%	3.0	11.0x	0.9x
Pharmaceutical	2,807	2,812	-5.19	-0.18%	34	532,147	7.9%	357.3	14.0%	11.4x	1.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Fuel & Power	1,024	1,033	-9.04	-0.87%	23	271,314	4.0%	211.0	8.3%	8.8x	0.6x	MARICO	85,387	2.6%	8.9	13.8x	28.6x
Cement	1,792	1,796	-3.98	-0.22%	7	85,414	1.3%	7.9	0.3%	20.6x	1.9x	BERGERPBL	69,122	2.1%	0.4	21.6x	4.0x
Services & Real Estate	942	940	+1.70	+0.18%	9	51,790	0.8%	83.3	3.3%	16.5x	0.4x	UPGDCL	68,462	2.1%	1.0	6.4x	1.5x
Engineering	2,278	2,290	-12.11	-0.53%	42	256,687	3.8%	376.8	14.8%	13.3x	0.7x	LHB	56,443	1.7%	4.6	13.9x	3.0x
Food & Allied	12,967	12,875	+92.02	+0.71%	21	237,676	3.5%	280.4	11.0%	19.0x	3.6x	BXPBARMA	49,028	1.5%	12.4	7.7x	1.0x
IT	1,634	1,663	-29.33	-1.76%	11	21,550	0.3%	106.9	4.2%	22.7x	1.3x	RENATA	45,340	1.4%	2.1	19.2x	1.3x
Textile	1,032	1,031	+1.21	+0.12%	58	107,850	1.6%	339.0	13.3%	71.7x	0.7x	UNILEVERCL	42,835	1.3%	0.1	59.3x	20.7x
Paper & Printing	4,304	4,373	-68.93	-1.58%	6	19,446	0.3%	87.6	3.4%	NM	1.1x	PUBALIBANK	37,872	1.2%	1.5	6.1x	0.5x
Tannery	1,811	1,820	-9.25	-0.51%	6	20,966	0.3%	18.5	0.7%	NM	1.4x	DUTCHBANGL	36,735	1.1%	1.2	7.5x	0.7x
Jute	11,608	11,688	-79.38	-0.68%	3	2,555	0.0%	17.8	0.7%	NM	NM	CITYBANK	36,509	1.1%	21.0	2.8x	0.6x
Ceramics	370	373	-3.08	-0.83%	5	16,589	0.2%	28.4	1.1%	NM	1.1x	EBL	35,906	1.1%	17.4	4.5x	0.8x
Miscellaneous	3,888	3,895	-6.99	-0.18%	15	211,304	3.1%	160.6	6.3%	99.1x	1.7x	PRIMEBANK	33,425	1.0%	3.4	3.8x	0.7x
Corporate Bond**	16,768	16,704	+64.09	+0.38%	16	37,019	0.6%	0.8	0.0%	NM	NM	ICB	31,742	1.0%	1.7	NM	1.0x
Treasury Bond**	2,249	2,251	-2.08	-0.09%	233	3,433,605	51.0%	0.8	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
ILFSL	0.7	+10.6%	0.3	NM	NM	SQURPHARMA	104,510	7.3%	7.1x	1.2x	ORIONINFU	378.6	+3.7%	170.2	NM	22.8x
SHYAMPSUG	200.2	+10.0%	27.2	NM	NM	BRACBANK	73,520	5.2%	8.3x	1.3x	KBPPWBIL	54.9	-5.3%	115.4	NM	4.5x
ZEALBANGLA	145.3	+10.0%	5.4	NM	NM	BEXIMCO	69,465	4.9%	NM	1.3x	DOMINAGE	26.2	+3.1%	89.0	NM	1.5x
FAREASTFIN	0.7	+9.8%	0.4	NM	NM	ISLAMIBANK	62,516	4.4%	NM	0.8x	MIDLANDBNK	18.2	+3.4%	78.4	14.0x	1.2x
PLFSL	0.6	+8.8%	0.9	NM	NM	WALTONHIL	50,579	3.6%	11.0x	0.9x	BDTHAIFOOD	16.4	-1.8%	75.6	NM	1.4x
REGENTTEX	2.6	+8.33%	0.7	NM	0.1x	GP	38,875	2.7%	12.8x	7.6x	ANWARGALV	81.2	-6.8%	61.4	NM	19.2x
PREMIERLEA	0.7	+8.1%	0.6	NM	NM	BATBC	36,336	2.6%	11.6x	2.4x	SIMTEX	23.8	+1.3%	59.4	23.6x	1.0x
SAPORTL	41.1	+7.6%	44.4	15.6x	1.1x	BXPBARMA	34,505	2.4%	7.7x	1.0x	LOVELLO	67.6	-5.1%	51.4	38.5x	5.4x
STANCERAM	76.4	+7.2%	5.8	NM	NM	PUBALIBANK	25,230	1.8%	6.1x	0.5x	MPETROLEUM	212.4	-0.8%	47.0	3.4x	0.7x
GREENDELMF	3.0	+7.1%	0.1	NM	0.3x	CITYBANK	25,210	1.8%	2.8x	0.6x	FINEFOODS	337.6	+3.6%	45.7	55.1x	19.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	19.2x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FASFIN	0.8	-10.0%	0.1	NM	NM	LHB	21,812	1.5%	13.9x	3.0x	FINEFOODS	340.0	300.0	14.0	218	66.96
KPPL	16.8	-9.7%	22.0	NM	NM	PRIMEBANK	20,145	1.4%	3.8x	0.7x	SHYAMPSUG	196.0	195.0	6.0	30	5.86
BDTHAI	11.7	-7.7%	1.3	NM	0.2x	OLYMPIC	19,861	1.4%	13.8x	2.1x	SHYAMPSUG	196.0	195.0	6.0	30	5.86
PRIMEFIN	1.2	-7.7%	1.3	NM	0.2x	ALARABANK	15,936	1.1%	43.1x	0.8x	ACMELAB	76.7	76.7	1.0	69	5.30
GHCL	20.4	-7.3%	3.9	NM	0.3x	ROBI	15,347	1.1%	15.9x	2.2x	NATLIFEINS	76.8	76.8	1.0	52	4.00
ANWARGALV	81.2	-6.8%	61.4	NM	19.2x	UTTARABANK	14,718	1.0%	NM	0.7x	MEGHNALIFE	41.6	41.6	1.0	70	2.91
INTECH	25.7	-6.5%	23.7	NM	NM	BEACONPHAR	14,601	1.0%	21.9x	3.4x	ORIONINFU	362.1	362.1	1.0	7	2.54
OIMEX	14.4	-6.5%	11.6	46.5x	4.8x	UCB	13,924	1.0%	4.0x	0.4x	JAMUNABANK	23.0	23.0	1.0	100	2.30
GSPFINANCE	1.5	-6.3%	0.4	NM	NM	BSRMLTD	13,247	0.9%	3.6x	0.4x	CITYBANK	21.7	21.7	1.0	100	2.17
BIFC	1.7	-5.6%	0.3	NM	NM	* 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					INDEXAGRO	59.6	59.6	1.0	35	2.07

* 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
FINEFOODS	340.0	300.0	67.0	218	14
SHYAMPSUG	196.0	195.0	5.9	30	6
SHYAMPSUG	196.0	195.0	5.9	30	6
ACMELAB	76.7	76.7	5.3	69	1
NATLIFEINS	76.8	76.8	4.0	52	1
MEGHNALIFE	41.6	41.6	2.9	70	1
ORIONINFU	362.1	362.1	2.5	7	1
JAMUNABANK	23.0	23.0	2.3	100	1
CITYBANK	21.7	21.7	2.2	100	1
INDEXAGRO	59.6	59.6	2.1	35	1
UTTARABANK	19.2	19.2	1.9	100	1
AFTABAUTO	31.5	31.5	1.7	55	1
ASIATICLAB	53.2	53.2	1.6	30	1
SAMORITA	76.7	76.7	1.5	20	1
SALVO	31.6	31.6	1.4	44	1
EXIM1STMF	3.0	3.0	1.4	450	1
SONALILIFE	53.1	53.1	1.0	20	1
UNITEDFIN	10.5	10.5	0.9	84	1
MIRACLEIND	26.0	26.0	0.8	33	1
SQURPHARMA	185.0	185.0	0.8	4	1
SAPORTL	39.0	39.0	0.7	18	1
BEACONPHAR	94.5	94.5	0.6	7	1
Total			130.2		52

Important DSE News

GHCL

The Board of Directors has recommended No Dividend for the year ended June 30, 2025. Date, Time and Venue of the AGM: To be declared later. Record Date: 29.12.2025. The Company has also reported EPS of Tk. (2.19), NAV per share of Tk. 71.89 and NOCFPS of Tk. (1.85) for the year ended June 30, 2025 as against Tk. (7.58), Tk. 74.08 and Tk. 2.42 respectively for the year ended June 30, 2024.

GENEXIL

The Board of Directors has recommended 1% Cash Dividend excluding Sponsors and Directors for the year ended June 30, 2025. The Sponsors and Directors hold 36,195,732 shares out of the total 120,450,021 shares of the company and Cash Dividend payable to the General Shareholders is Tk. 8,425,429.00. Date of AGM: 30.12.2025, Time: 11:00 AM, Venue/Mode: Hybrid System and at RAOVA Convention Hall. Record Date: 21.12.2025. The Company has also reported Consolidated EPS of Tk. 2.17, Consolidated NAV per share of Tk. 22.11 and Consolidated NOCFPS of Tk. 6.87 for the year ended June 30, 2025 as against Tk. 2.62, Tk. 20.38 and Tk. 1.85 respectively for the year ended June 30, 2024. (end)

OIMEX

(Q1 Un-audited): EPS was Tk. (0.29) for July-September 2025 as against Tk. 0.01 for July-September 2024. NOCFPS was Tk. (1.51) for July-September 2025 as against Tk. (22.62) for July-September 2024. NAV per share was Tk. 2.98 as on September 30, 2025 and Tk. 3.27 as on June 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GOLDENSON		0.0%	0.0%	Record Date	15-Dec-25
LRBDL		0.0%	0.0%	Record Date	21-Dec-25
EASTRNLAB		50.0%	80.0%	Record Date	22-Dec-25
GPHISPAT		0.0%	5.0%	Record Date	23-Dec-25
KBPPWBIL		0.0%	10.0%	Record Date	24-Dec-25
BSC		0.0%	25.0%	Record Date	24-Dec-25
OIMEX		0.0%	0.0%	Record Date	30-Dec-25
KAY&QUE		6.0%	4.0%	Record Date	II be notified lat
TOSRIFA		2.0%	0.0%	Record Date	II be notified lat
MIRACLEIND		0.0%	0.0%	Record Date	II be notified lat

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