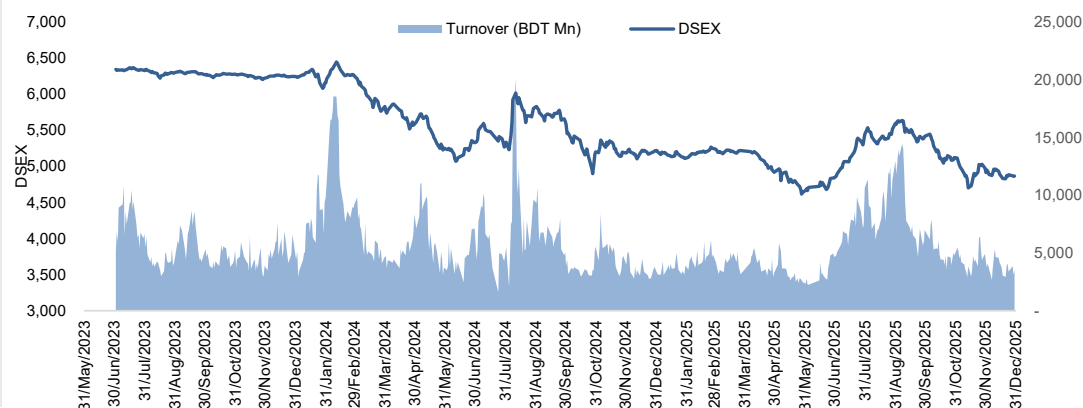


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.08%) gained 3.78 points and closed at 4,865.34. The blue-chip index DS30 (-0.21%), the Shariah-based index DSES (+0.07%), and the large-cap index CDSET (-0.07%) closed at 1,853.54, 1,000.72, and 1,004.81 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.31% followed by Telecommunication (-0.10%), Food & Allied (-0.09%), Pharmaceutical (-0.06%), Bank (-0.02%), Engineering (+0.11%), and Fuel & Power (+0.88%), respectively. Block trades contributed 12.1% of the overall market turnover. City Bank PLC. (-0.4%) was the most traded share with a turnover of BDT 130 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,865.34	4,861.56	+3.78	+0.08%	-6.7%
DS30	1,853.54	1,857.50	-3.96	-0.21%	-4.4%
DSES	1,000.72	999.98	+0.74	+0.07%	-14.4%
CDSET	1,004.81	1,005.51	-0.70	-0.07%	-5.7%

	Advanced	Declined	Unchanged	Total
All Category	180	122	90	392
A Category (Equity)	98	70	44	212
B Category (Equity)	36	24	24	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	46	28	22	96
Mutual Funds	2	11	21	34
Corporate Bonds	1	1	0	2
Treasury Bonds	0	4	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,781,828	6,758,314	+0.3%
	Mn USD	55,454	55,262	
Turnover	Mn BDT	3,540	3,100	+14.2%
	Mn USD	29	25	
Volume	Mn Shares	117	98	+19.1%
No. of Trade		114,801	108,798	+5.5%

* Average Interbank Exchange Rate is BDT 122.30 as of Dec 30, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Tasviha Taher Trishila Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

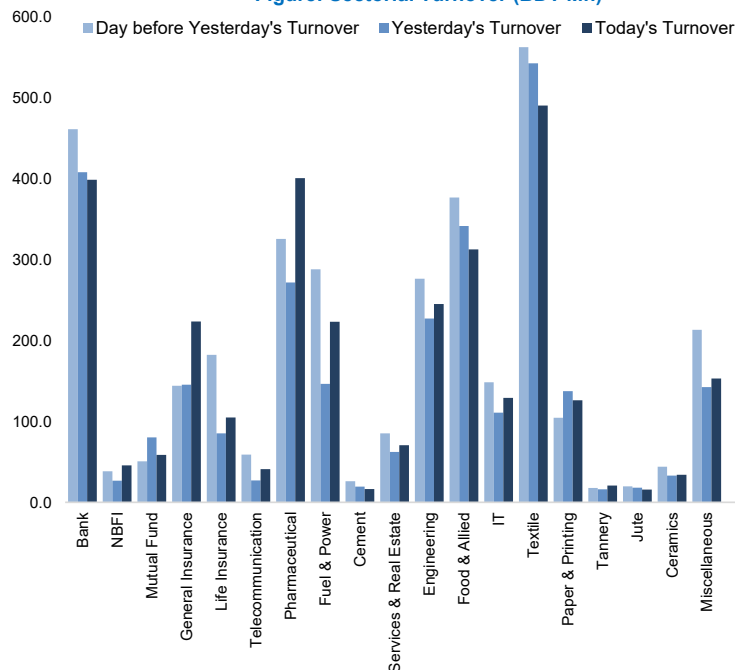
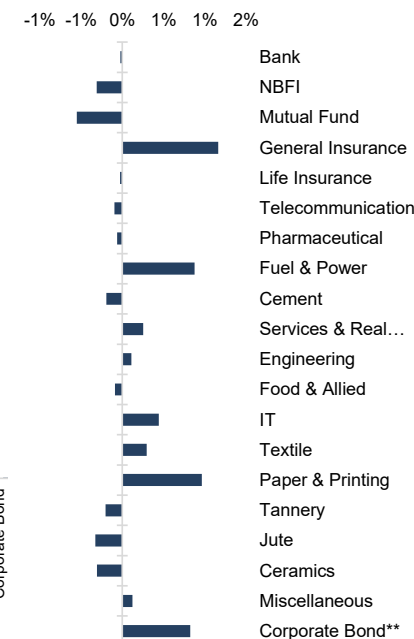


Figure: Sectorial Mcap Change



Market PE 13.7x

Market PB 1.5x

* 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	1,367	1,368	-0.31	-0.02%	36	646,901	9.5%	398.6	12.8%	NM	7.6x	GP	348,242	10.7%	19.1	11.8x	7.0x
NBFI	860	863	-2.67	-0.31%	23	81,973	1.2%	45.7	1.5%	NM	NM	SQURPHARMA	176,049	5.4%	61.8	7.0x	1.2x
Mutual Fund	478	481	-2.66	-0.55%	37	22,921	0.3%	58.6	1.9%	NM	0.4x	ROBI	147,710	4.6%	19.3	16.0x	2.2x
General Insurance	2,879	2,846	+33.14	+1.16%	43	82,167	1.2%	223.6	7.2%	13.6x	1.2x	BATBC	134,244	4.1%	14.1	11.7x	2.4x
Life Insurance	1,691	1,692	-0.43	-0.03%	15	44,986	0.7%	104.9	3.4%	NM	NM	BRACBANK	125,627	3.9%	28.2	8.0x	1.2x
Telecommunication	4,432	4,436	-4.23	-0.10%	3	519,631	7.7%	41.1	1.3%	12.8x	3.9x	WALTONHIL	125,591	3.9%	2.7	11.1x	0.9x
Pharmaceutical	2,764	2,766	-1.69	-0.06%	34	524,087	7.7%	400.7	12.9%	11.2x	1.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Fuel & Power	996	987	+8.67	+0.88%	23	263,866	3.9%	223.0	7.2%	8.6x	0.5x	MARICO	84,215	2.6%	22.5	13.6x	28.2x
Cement	1,739	1,743	-3.38	-0.19%	7	82,882	1.2%	16.3	0.5%	20.0x	1.8x	BERGERPBL	67,992	2.1%	1.0	21.3x	3.9x
Services & Real Estate	950	947	+2.40	+0.25%	9	52,237	0.8%	70.8	2.3%	16.6x	0.4x	UPGDCL	67,303	2.1%	0.4	6.3x	1.5x
Engineering	2,291	2,288	+2.54	+0.11%	42	258,128	3.8%	245.2	7.9%	13.5x	0.7x	ISLAMIBANK	52,808	1.6%	5.8	NM	0.7x
Food & Allied	12,943	12,954	-11.36	-0.09%	21	237,232	3.5%	312.6	10.0%	18.9x	3.6x	BXPBARMA	45,548	1.4%	66.8	7.1x	0.9x
IT	1,703	1,696	+7.54	+0.44%	11	22,465	0.3%	129.3	4.2%	23.3x	1.4x	RENATA	44,938	1.4%	22.9	19.0x	1.3x
Textile	1,061	1,058	+3.13	+0.30%	58	110,835	1.6%	490.3	15.7%	NM	0.7x	UNILEVERCL	41,457	1.3%	0.2	57.4x	20.0x
Paper & Printing	4,486	4,443	+42.88	+0.97%	6	20,265	0.3%	126.1	4.0%	NM	1.1x	PUBALIBANK	40,214	1.2%	7.7	6.5x	0.5x
Tannery	1,806	1,810	-3.66	-0.20%	6	20,908	0.3%	20.7	0.7%	NM	1.4x	EBL	38,778	1.2%	12.8	4.9x	0.8x
Jute	11,806	11,844	-38.68	-0.33%	3	2,599	0.0%	15.8	0.5%	NM	NM	DUTCHBANGL	37,218	1.1%	4.5	7.6x	0.7x
Ceramics	370	371	-1.14	-0.31%	5	16,604	0.2%	34.2	1.1%	NM	1.1x	CITYBANK	37,118	1.1%	130.1	2.8x	0.6x
Miscellaneous	3,882	3,877	+4.84	+0.12%	15	210,943	3.1%	153.0	4.9%	94.6x	1.6x	PRIMEBANK	33,309	1.0%	19.3	3.8x	0.7x
Corporate Bond**	16,636	16,500	+135.88	+0.82%	16	36,727	0.5%	0.8	0.0%	NM	NM	ICB	31,395	1.0%	1.1	NM	1.0x
Treasury Bond**	2,290	2,278	+12.14	+0.53%	232	3,526,145	52.0%	2.1	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
BDWELDING	17.7	+9.9%	14.4	NM	1.5x	SQURPHARMA	99,559	7.4%	7.0x	1.2x	CITYBANK	24.4	-0.4%	130.1	2.8x	0.6x
REGENTEX	3.8	+8.6%	1.8	NM	0.1x	BEXIMCO	69,465	5.1%	NM	1.3x	ORIONINFU	341.7	+0.1%	107.8	NM	20.6x
PROGRESLIF	48.5	+6.6%	1.6	NM	NM	BRACBANK	68,804	5.1%	8.0x	1.2x	SONALIPAPR	236.0	+1.9%	101.5	28.7x	1.5x
HWAWELLTEX	44.0	+6.3%	7.5	12.3x	1.1x	ISLAMIBANK	53,516	4.0%	NM	0.7x	UTTARABANK	22.8	+0.4%	88.9	NM	0.8x
INTECH	31.5	+5.7%	42.4	NM	NM	WALTONHIL	48,012	3.6%	11.1x	0.9x	SIMTEX	22.4	+1.4%	78.9	22.2x	1.0x
CENTRALINS	40.0	+5.26%	16.6	22.6x	0.8x	BATBC	35,450	2.6%	11.7x	2.4x	RAHIMAFOD	158.7	-2.0%	77.6	NM	16.7x
NURANI	2.1	+5.0%	0.0	NM	0x	GP	35,148	2.6%	11.8x	7.0x	BSC	111.1	+1.0%	74.6	5.8x	1.0x
ISNLTD	77.9	+5.0%	17.8	NM	32.5x	BXPBARMA	33,975	2.5%	7.1x	0.9x	BXPBARMA	102.1	-1.2%	66.8	7.1x	0.9x
AAMRATECH	11.6	+4.5%	1.4	NM	0.6x	PUBALIBANK	28,033	2.1%	6.5x	0.5x	SAIHAMCOT	19.4	-	65.9	19.4x	0.5x
ISLAMICFIN	9.5	+4.4%	7.3	NM	NM	CITYBANK	25,421	1.9%	2.8x	0.6x	SPCL	47.2	+2.6%	65.2	13.2x	1.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	22,331	1.7%	19.0x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PREMIERLEA	0.5	-10.0%	0.4	NM	NM	PRIMEBANK	21,036	1.6%	3.8x	0.7x	CITYBANK	24.7	24.7	1.0	3,500	86.45
PRIMEFIN	1.0	-9.1%	0.6	NM	0x	LHB	20,579	1.5%	13.3x	2.9x	GP	262.3	242.0	24.0	219	54.76
FAMILYTEX	1.2	-7.7%	1.6	NM	NM	OLYMPIC	18,590	1.4%	13.6x	2.1x	GREENDELT	52.7	52.7	1.0	1,000	52.70
FIRSTFIN	2.4	-7.7%	1.6	NM	NM	ALARABANK	15,545	1.2%	39.4x	0.7x	JAMUNABANK	21.5	21.5	1.0	1,961	42.15
ILFSL	0.6	-6.8%	2.3	NM	NM	UTTARABANK	14,997	1.1%	NM	0.8x	FINEFOODS	370.0	350.0	4.0	101	36.68
BIFC	1.6	-5.9%	0.3	NM	NM	ROBI	14,666	1.1%	16.0x	2.2x	SQURPHARMA	211.5	211.5	1.0	144	30.38
APOLOISPAT	1.7	-5.6%	1.8	NM	0.1x	BEACONPHAR	14,420	1.1%	21.8x	3.4x	APEXSPINN	170.6	169.0	6.0	154	26.09
PLFSL	0.5	-5.4%	0.3	NM	NM	UCB	13,924	1.0%	4.3x	0.4x	PUBALIBANK	31.5	31.5	1.0	790	24.88
ICBIBANK	2.3	-4.2%	0.2	NM	NM	BSRMLTD	12,047	0.9%	3.6x	0.4x	CITYGENINS	84.5	76.3	13.0	275	21.71
LRGLOBMF1	2.7	-3.6%	0.1	NM	0.3x	* 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					ORIONINFU	323.0	322.0	3.0	55	17.72

* 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
CITYBANK	24.7	24.7	86.5	3,500	1
GP	262.3	242.0	54.8	219	24
GREENDELT	52.7	52.7	52.7	1,000	1
JAMUNABANK	21.5	21.5	42.2	1,961	1
FINEFOODS	370.0	350.0	36.7	101	4
SQURPHARMA	211.5	211.5	30.4	144	1
APEXSPINN	170.6	169.0	26.1	154	6
PUBALIBANK	31.5	31.5	24.9	790	1
CITYGENINS	84.5	76.3	21.7	275	13
ORIONINFU	323.0	322.0	17.7	55	3
LOVELLO	67.0	61.3	6.3	96	3
ACI	199.5	199.5	4.7	24	1
BSCPLC	120.0	120.0	4.2	35	1
ACMEPL	16.1	16.0	3.4	212	2
EBL	24.3	22.4	2.9	124	2
RECKITBEN	3,281.0	3,281.0	1.8	1	1
KAY&QUE	370.0	370.0	1.7	5	1
SUNLIFEINS	50.5	50.5	1.3	25	1
ETL	10.3	10.3	1.0	100	1
ACMELAB	77.3	77.3	1.0	13	1
RAHIMTEXT	245.5	245.5	0.8	3	1
INTRACO	22.0	22.0	0.8	35	1
Total			427.1		78

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ALLTEX		0.0%	0.0%	Record Date	07-Jan-26
MAKSONSPIN		0.0%	0.0%	Record Date	07-Jan-26
AL-HAJTEX		35.0%	5.0%	Record Date	15-Jan-26
KTL		0.0%	0.1%	Record Date	21-Jan-26

Important DSE News

PLFSL

(Q3 Un-audited): EPS was Tk. (3.15) for July-September 2025 as against Tk. (4.17) for July-September 2024; EPS was Tk. (9.77) for January-September 2025 as against Tk. (9.90) for January-September 2024. NOCFPS was Tk. (0.26) for January-September 2025 as against Tk. (0.07) for January-September 2024. NAV per share was Tk. (152.69) as on September 30, 2025 and Tk. (149.50) as on December 31, 2024.

NFML

(Q3 Un-audited): EPS was Tk. 0.05 for January-March 2025 as against Tk. (0.18) for January-March 2024; EPS was Tk. (0.06) for July 2024-March 2025 as against Tk. (0.43) for July 2023-March 2024. NOCFPS was Tk. 0.07 for July 2024-March 2025 as against Tk. 0.22 for July 2023-March 2024. NAV per share was Tk. 11.01 as on March 31, 2025 and Tk. 11.07 as on June 30, 2024. Reasons for deviation: EPS for the period has increased against the prior period though the company's revenue growth decreased during the 3rd Quarter ended on 31 March 2025. However, the company's gross profit margin and EPS have been increased due to efficient cost control, review of depreciation rate and proper adoption of IAS-12. NOCFPS decreased due to higher payment to suppliers and adjustment of outstanding Accounts Payables during the period. NAV Per share also decreased comparing with the prior period due to negative EPS.

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