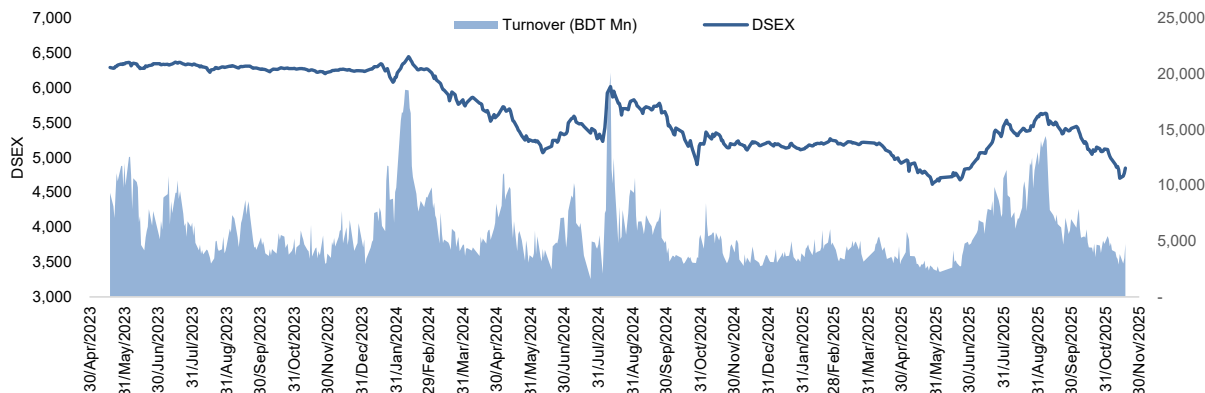


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.51%) gained 71.92 points and closed at 4,846.88. The blue-chip index DS30 (+1.06%), the Shariah-based index DSES (+1.72%), and the large-cap index CDSET (+0.91%) closed at 1,889.77, 1,017.67, and 1,015.58 points, respectively. All of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.91% followed by Food & Allied (+2.15%), Engineering (+1.96%), Bank (+1.64%), Pharmaceutical (+0.84%), Telecommunication (+0.40%), and Fuel & Power (+0.31%), respectively. Block trades contributed 6.6% of the overall market turnover. Summit Alliance Port Limited (-0.9%) was the most traded share with a turnover of BDT 180 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,846.88	4,774.96	+71.92	+1.51%	-7.1%
DS30	1,889.77	1,869.90	+19.87	+1.06%	-2.6%
DSES	1,017.67	1,000.42	+17.25	+1.72%	-12.9%
CDSET	1,015.58	1,006.45	+9.13	+0.91%	-4.7%

	Advanced	Declined	Unchanged	Total
All Category	320	38	19	377
A Category (Equity)	172	23	16	211
B Category (Equity)	70	4	0	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	78	11	3	92
Mutual Funds	25	2	8	35
Corporate Bonds	2	0	1	3
Treasury Bonds	1	3	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,821,709	6,781,797	+0.6%
	Mn USD	55,810	55,484	
Turnover	Mn BDT	4,755	3,481	+36.6%
	Mn USD	39	28	
Volume	Mn Shares	173	116	+48.7%
No. of Trade		170,345	139,022	+22.5%

* Average Interbank Exchange Rate is BDT 122.23 as of Nov 18, 2025

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Figure: Sectorial Turnover (BDT Mn)

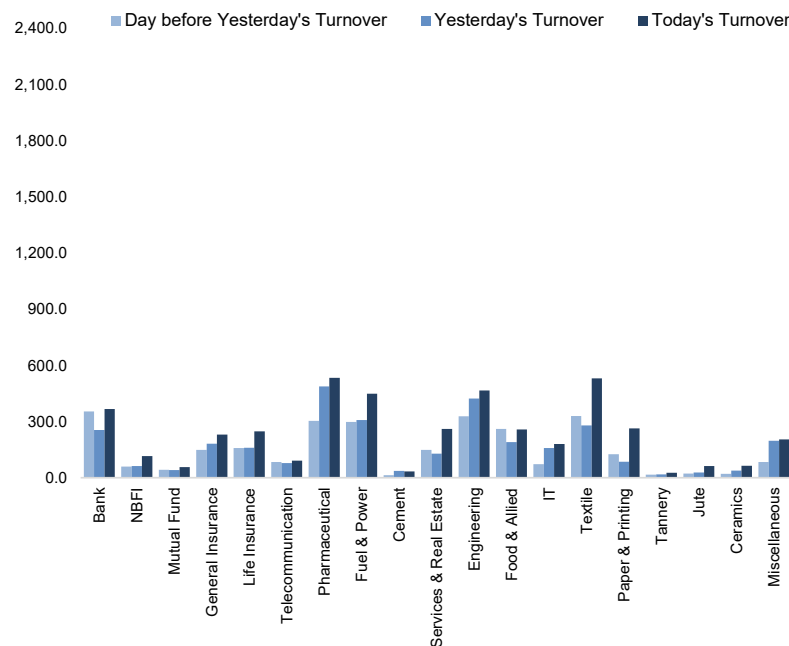
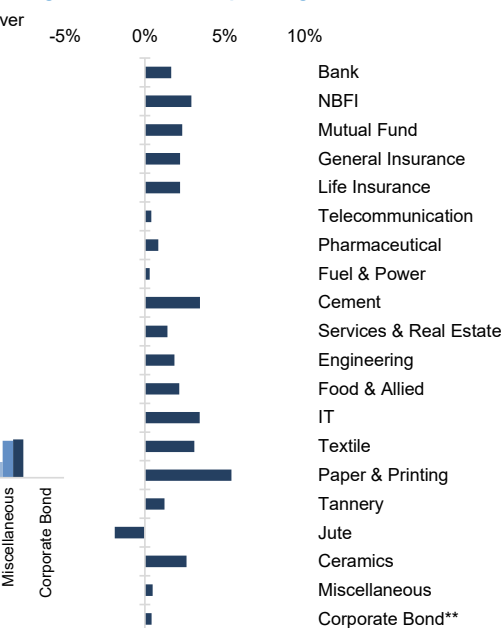


Figure: Sectorial Mcap Change



Market PE 13.7x

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	1,356	1,334	+21.90	+1.64%	36	641,783	9.5%	366.5	8.3%	NM	1.0x	GP	367,822	11.3%	20.7	12.5x	7.4x
NBFI	902	876	+25.49	+2.91%	23	85,941	1.3%	115.4	2.6%	NM	NM	SQURPHARMA	180,304	5.5%	106.0	7.1x	1.2x
Mutual Fund	473	463	+10.80	+2.33%	37	22,691	0.3%	57.2	1.3%	NM	0.4x	ROBI	146,138	4.5%	56.9	15.9x	2.2x
General Insurance	2,669	2,611	+57.43	+2.20%	43	76,160	1.1%	230.6	5.2%	12.6x	1.1x	BATBC	135,054	4.1%	25.9	11.8x	2.4x
Life Insurance	1,646	1,611	+35.62	+2.21%	15	43,782	0.6%	247.7	5.6%	NM	NM	BRACBANK	131,003	4.0%	23.5	8.3x	1.3x
Telecommunication	4,593	4,574	+18.52	+0.40%	3	538,518	7.9%	90.6	2.0%	13.2x	4.0x	WALTONHIL	124,991	3.8%	11.2	11.1x	0.9x
Pharmaceutical	2,808	2,785	+23.38	+0.84%	34	532,450	7.8%	533.2	12.0%	11.4x	1.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Fuel & Power	1,041	1,038	+3.21	+0.31%	23	275,844	4.1%	448.0	10.1%	8.4x	0.6x	MARICO	86,927	2.7%	3.0	14.0x	29.2x
Cement	1,824	1,763	+60.85	+3.45%	7	86,903	1.3%	34.2	0.8%	21.0x	1.9x	UPGDCL	70,201	2.1%	6.9	5.9x	1.6x
Services & Real Estate	975	961	+13.54	+1.41%	9	53,621	0.8%	261.1	5.9%	17.1x	0.4x	BERGERPBL	69,112	2.1%	1.6	21.6x	3.9x
Engineering	2,261	2,220	+40.99	+1.85%	42	255,024	3.8%	465.8	10.5%	13.2x	0.7x	ISLAMIBANK	56,833	1.7%	5.0	NM	0.8x
Food & Allied	13,027	12,752	+274.44	+2.15%	21	238,775	3.5%	258.4	5.8%	19.1x	3.6x	BXPBARMA	47,689	1.5%	20.8	7.4x	1.0x
IT	1,634	1,580	+54.32	+3.44%	11	21,559	0.3%	179.8	4.0%	22.7x	1.3x	RENATA	44,732	1.4%	11.7	18.9x	1.2x
Textile	1,002	972	+30.14	+3.10%	58	104,341	1.5%	530.4	11.9%	69.3x	0.7x	UNILEVERCL	43,963	1.3%	0.0	60.8x	21.2x
Paper & Printing	4,285	4,065	+220.20	+5.42%	6	19,360	0.3%	263.3	5.9%	NM	1.1x	DUTCHBANGL	37,315	1.1%	3.6	7.6x	0.7x
Tannery	1,822	1,800	+21.97	+1.22%	6	21,087	0.3%	26.6	0.6%	NM	1.4x	PUBALIBANK	36,831	1.1%	2.3	5.9x	0.5x
Jute	11,819	12,047	-227.85	-1.89%	3	2,602	0.0%	61.9	1.4%	NM	NM	CITYBANK	36,509	1.1%	65.1	2.8x	0.6x
Ceramics	359	349	+9.10	+2.60%	5	16,086	0.2%	64.2	1.4%	NM	1.0x	EBL	36,065	1.1%	32.2	4.6x	0.8x
Miscellaneous	3,898	3,879	+18.89	+0.49%	15	211,854	3.1%	203.9	4.6%	99.3x	1.7x	ICB	34,690	1.1%	8.5	NM	1.1x
Corporate Bond**	16,805	16,734	+70.20	+0.42%	16	37,101	0.5%	0.2	0.0%	NM	NM	PRIMEBANK	31,220	1.0%	36.0	3.6x	0.7x
Treasury Bond**	2,308	2,311	-2.99	-0.13%	233	3,500,025	51.6%	2.1	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
PLFSL	0.8	+10.3%	0.4	NM	NM	SQURPHARMA	104,510	7.3%	7.1x	1.2x	SAPORTL	45.3	-0.9%	180.3	17.2x	1.2x
NEWLINE	3.3	+10.0%	0.4	NM	0.1x	BRACBANK	73,520	5.2%	8.3x	1.3x	LOVELLO	77.5	+7.5%	148.9	44.2x	6.2x
PDL	3.3	+10.0%	0.5	NM	0.2x	BEXIMCO	69,465	4.9%	NM	1.3x	SONALIPAPR	208.3	+7.7%	117.2	25.3x	1.4x
MLDYEING	7.7	+10.0%	5.2	NM	0.6x	ISLAMIBANK	62,516	4.4%	NM	0.8x	ANWARGALV	85.8	-	114.5	NM	20.2x
RAHIMTEXT	170.9	+10.0%	11.7	72.7x	6.3x	WALTONHIL	50,579	3.6%	11.1x	0.9x	ORIONINFU	350.7	+2.9%	106.5	NM	21.1x
INTECH	23.3	+9.91%	43.4	NM	NM	GP	38,875	2.7%	12.5x	7.4x	SQURPHARMA	203.4	+0.1%	106.0	7.1x	1.2x
METROSPIN	8.9	+9.9%	0.5	NM	2x	BATBC	36,336	2.6%	11.8x	2.4x	BPPL	15.2	+2.0%	105.6	7.0x	0.5x
PRIMETEX	12.3	+9.8%	1.5	NM	0.2x	BXPBARMA	34,505	2.4%	7.4x	1.0x	PRAGATILIF	153.1	+4.6%	88.2	NM	NM
FASFIN	0.9	+9.8%	0.2	NM	NM	PUBALIBANK	25,230	1.8%	5.9x	0.5x	SIMTEX	31.9	+0.3%	83.4	31.6x	1.4x
BBS	7.9	+9.7%	8.1	NM	0.7x	CITYBANK	25,210	1.8%	2.8x	0.6x	CVOPRL	155.4	+2.4%	80.0	32.5x	4.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	18.9x	1.2x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PROGRESLIF	39.1	-6.2%	0.3	NM	NM	LHB	21,812	1.5%	14.0x	3.0x	PRIMEBANK	26.8	26.8	1.0	5,000	134.00
EXIM1STMF	2.7	-3.6%	2.3	NM	0x	PRIMEBANK	20,145	1.4%	3.6x	0.7x	LOVELLO	79.0	68.0	5.0	508	36.60
LIBRAINFU	660.7	-2.7%	2.4	NM	2.9x	OLYMPIC	19,861	1.4%	14.2x	2.2x	LOVELLO	79.0	68.0	5.0	508	36.60
GQBALLPEN	406.3	-2.7%	2.4	NM	2.9x	ALARABANK	15,936	1.1%	42.8x	0.8x	TOSRIFA	17.0	17.0	2.0	1,000	17.00
MJLBD	87.4	-2.3%	20.1	8.0x	1.5x	ROBI	15,347	1.1%	15.9x	2.2x	SIMTEX	30.5	29.2	7.0	515	15.43
PRIME1CBA	4.2	-2.3%	0.2	NM	0.7x	UTTARABANK	14,718	1.0%	NM	0.7x	MONNOCERA	73.5	73.4	9.0	153	11.24
SONALIANSH	193.7	-2.3%	61.6	NM	2.9x	BEACONPHAR	14,601	1.0%	22.0x	3.4x	SUMITPOWER	12.7	12.7	1.0	457	5.81
ATLASBANG	51.9	-2.1%	0.4	NM	0.4x	UCB	13,924	1.0%	4.0x	0.4x	NBL	2.4	2.4	1.0	2,400	5.76
PENINSULA	15.1	-1.3%	12.2	41.9x	0.5x	BSRMLTD	13,247	0.9%	3.7x	0.4x	MEGHNALIFE	41.6	41.6	2.0	115	4.78
MONNOAGML	300.2	-1.3%	7.0	NM	2.7x	* 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					GP	270.0	270.0	1.0	10	2.70

* 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
PRIMEBANK	26.8	26.8	134.0	5,000	1
LOVELLO	79.0	68.0	36.6	508	5
LOVELLO	79.0	68.0	36.6	508	5
TOSRIFA	17.0	17.0	17.0	1,000	2
SIMTEX	30.5	29.2	15.4	515	7
MONNOCERA	73.5	73.4	11.2	153	9
SUMITPOWER	12.7	12.7	5.8	457	1
NBL	2.4	2.4	5.8	2,400	1
MEGHNALIFE	41.6	41.6	4.8	115	2
GP	270.0	270.0	2.7	10	1
DOMINAGE	23.0	20.0	2.7	125	3
FEKDIL	13.0	13.0	2.6	200	1
ASIATICLAB	50.2	50.2	2.5	50	1
ORIONINFU	336.0	336.0	2.0	6	1
DULAMACOT	117.0	117.0	1.8	15	1
LANKABAFIN	12.5	12.5	1.4	111	1
RAHIMTEXT	153.0	153.0	1.3	9	1
BANKASIA	16.1	16.1	1.2	75	1
ASIAPACINS	25.8	25.8	1.2	45	1
BSC	114.0	114.0	1.1	10	1
JAMUNABANK	20.4	20.4	1.0	50	1
BXPHERMA	95.3	95.3	1.0	10	1
Total			314.0		58

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DOREENPWR		0.0%	10.0%	Record Date	19-Nov-25
BENGALWTL		0.0%	5.0%	Record Date	19-Nov-25
AGNISYSL		0.0%	2.5%	Record Date	19-Nov-25
BARKAPOWER		0.0%	0.0%	Record Date	19-Nov-25
BPPL		0.0%	2.0%	Record Date	19-Nov-25
SAFKOSPINN		0.0%	0.0%	Record Date	19-Nov-25
SHEPHERD		0.0%	1.0%	Record Date	19-Nov-25
LEGACYFOOT		0.0%	0.5%	Record Date	19-Nov-25
TECHNODRUG		0.0%	10.0%	Record Date	19-Nov-25
SHASHADNIM		0.0%	5.0%	Record Date	19-Nov-25
SAIHAMCOT		0.0%	7.0%	Record Date	19-Nov-25
PTL		0.0%	12.0%	Record Date	19-Nov-25
BPML		0.0%	0.0%	Record Date	19-Nov-25
BDTHAIFOOD		0.0%	0.0%	Record Date	19-Nov-25
ACIFORMULA		0.0%	25.0%	Record Date	19-Nov-25
ACI		0.0%	25.0%	Record Date	19-Nov-25
NAVANAPHAR		0.0%	14.0%	Record Date	19-Nov-25

Important DSE News

DSHGARME

(Q1 Un-audited): EPS was Tk. 0.04 for July-September 2025 as against Tk. 0.10 for July-September 2024; NOCFPS was Tk. 8.52 for July-September 2025 as against Tk. (1.80) for July-September 2024. NAV per share was Tk. 157.03 as on September 30, 2025 and Tk. 157.02 as on June 30, 2025. EPS decreased in the current period due to increased expenses. NOCFPS increased due to increased turnover.

SILCOPHL

The Board of Directors has recommended 1.10% Cash Dividend for all shareholders excluding Directors for the year ended June 30, 2025. The Directors hold 36,615,370 shares out of the total 103,807,000 shares of the company and Cash Dividend payable to the General Shareholders, Independent Directors and Sponsors only is Tk. 7,391,079.00 for 67,191,630 shares. Date of AGM: 19.01.2026, Time: 11:30 AM, Venue: Hybrid System: Online and Physical Platform at registered office premises. Record Date: 15.12.2025. The Company has also reported EPS of Tk. 0.41, NAV per share of Tk. 23.02, and NOCFPS of Tk. 0.74 for the year ended June 30, 2025, as against EPS of Tk. 0.44, NAV per share of Tk. 22.66, and NOCFPS of Tk. 0.81 for the year ended June 30, 2024.

UNIONBANK

The company has informed that the Audited Financial Statements for the year ended December 31, 2024 was adopted on November 13, 2025. The Company has reported EPS of Tk. (248.91), NAV per share of Tk. (237.44), and NOCFPS of Tk. (22.09) for the year ended December 31, 2024 as against Tk. (2.82), Tk. 11.66 and Tk. (0.27) respectively for the year ended December 31, 2023.

RINGSHINE

The company has informed that Mr. Sung Chung Yao has been appointed as the Chairman of the Board of the company.

DHAKAINS

The Company has informed that 20,06,250 shares of Late Fazlur Rahman, former Sponsor Director of the company who passed away on 25.12.2023, will be transmitted among his successors according to the Succession Certificate issued by the Honorable Court. As such, Mrs. Hamida Rahman, Sponsor Director of the company, will receive 250,781 shares. Mr. Md. Hasan, Sponsor of the company, will receive 702,187 shares. Ms. Farzana Rahman, Sponsor of the company, will receive 351,094 shares. Ms. Shampa Rahman, Sponsor Director of the company, will receive 351,094 shares. Ms. Razia Sultana, General Shareholder of the company, will receive 351,094 shares.

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