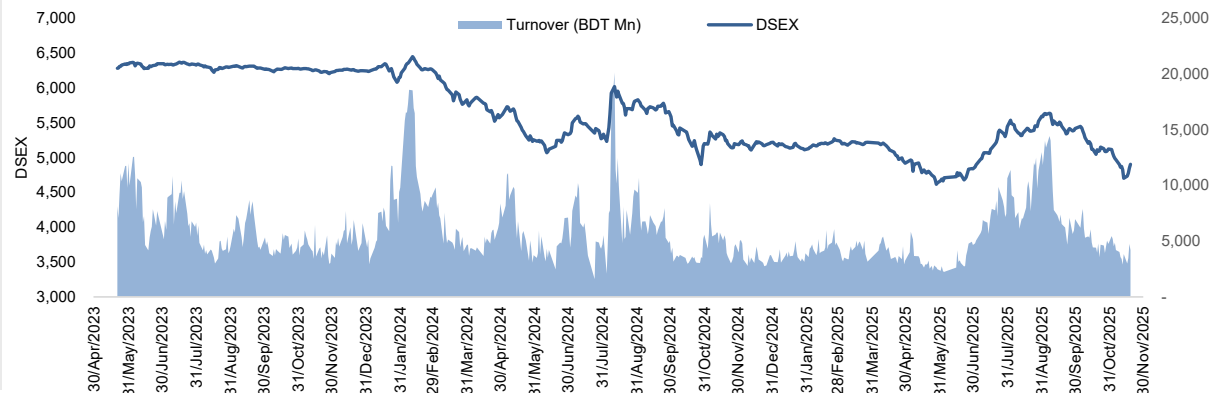


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.12%) gained 54.5 points and closed at 4,901.38. The blue-chip index DS30 (+0.19%), the Shariah-based index DSES (+1.15%), and the large-cap index CDSET (+0.37%) closed at 1,893.43, 1,029.41, and 1,019.35 points, respectively. All of the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 2.04% followed by NBF (1.59%), Engineering (+1.53%), Bank (+1.51%), Food & Allied (+1.10%), Telecommunication (+0.49%), and Pharmaceutical (+0.07%), respectively. Block trades contributed 4.3% of the overall market turnover. Shahjibazar Power Co. Ltd. (+7.0%) was the most traded share with a turnover of BDT 133 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,901.38	4,846.88	+54.50	+1.12%	-6.0%
DS30	1,893.43	1,889.77	+3.66	+0.19%	-2.4%
DSES	1,029.41	1,017.67	+11.74	+1.15%	-11.9%
CDSET	1,019.35	1,015.58	+3.77	+0.37%	-4.4%

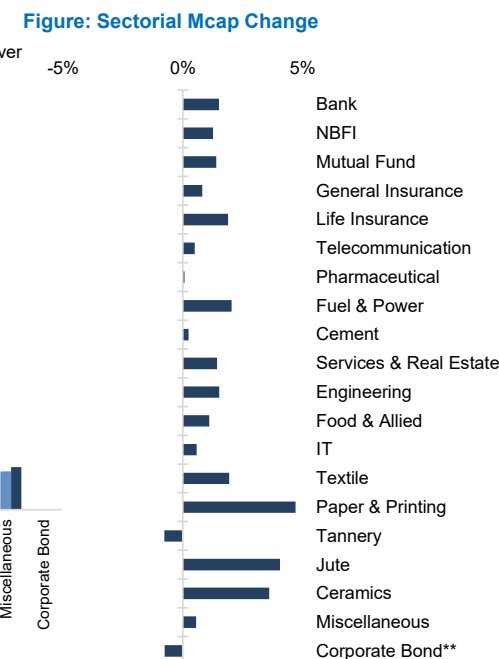
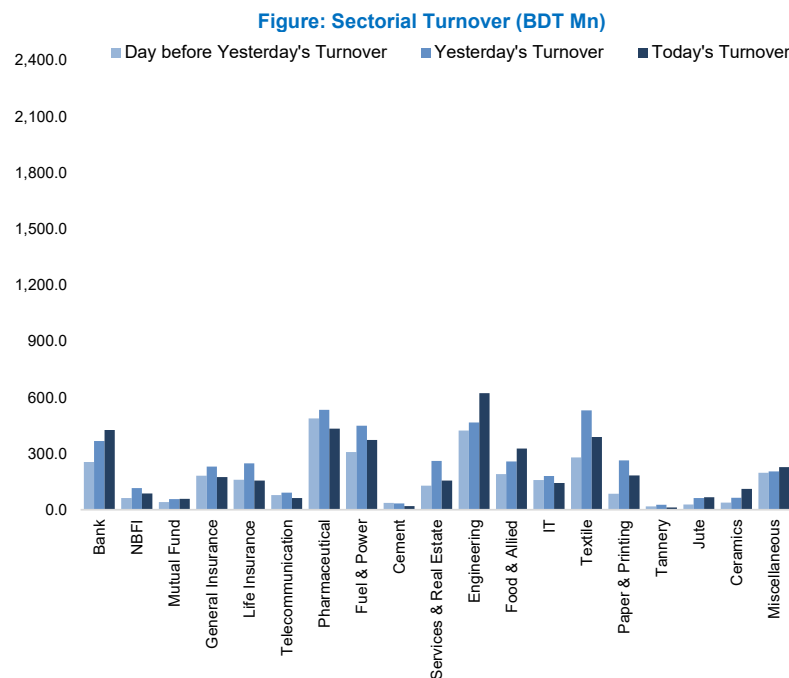
	Advanced	Declined	Unchanged	Total
All Category	310	36	30	376
A Category (Equity)	158	29	22	209
B Category (Equity)	66	4	3	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	86	3	5	94
Mutual Funds	16	2	17	35
Corporate Bonds	1	1	0	2
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,853,974	6,821,709	+0.5%
	Mn USD	56,074	55,810	
Turnover	Mn BDT	4,206	4,755	-11.6%
	Mn USD	34	39	
Volume	Mn Shares	146	173	-15.5%
No. of Trade		154,085	170,345	-9.5%

* Average Interbank Exchange Rate is BDT 122.23 as of Nov 19, 2025

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Market PE 13.8x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, several NBFs 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	1,377	1,356	+20.43	+1.51%	36	651,448	9.6%	425.7	10.6%	NM	1.0x	GP	369,847	11.2%	25.3	12.6x	7.5x
NBFI	913	902	+11.40	+1.26%	23	87,306	1.3%	86.6	2.2%	NM	NM	SQURPHARMA	179,240	5.4%	95.1	7.1x	1.2x
Mutual Fund	480	473	+6.61	+1.40%	37	23,008	0.3%	57.9	1.4%	NM	0.4x	ROBI	146,662	4.4%	32.8	15.9x	2.2x
General Insurance	2,690	2,669	+21.70	+0.81%	43	76,780	1.1%	174.0	4.3%	12.7x	1.1x	BATBC	136,026	4.1%	33.0	11.8x	2.4x
Life Insurance	1,677	1,646	+31.14	+1.89%	15	44,610	0.7%	156.0	3.9%	NM	NM	BRACBANK	130,605	4.0%	119.1	8.3x	1.3x
Telecommunication	4,615	4,593	+22.70	+0.49%	3	541,180	7.9%	61.9	1.5%	13.3x	4.0x	WALTONHIL	125,058	3.8%	4.0	11.1x	0.9x
Pharmaceutical	2,810	2,808	+2.03	+0.07%	34	532,835	7.8%	433.0	10.8%	11.5x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,063	1,041	+21.22	+2.04%	23	281,464	4.1%	372.2	9.3%	8.6x	0.6x	MARICO	86,912	2.6%	1.5	14.0x	29.2x
Cement	1,828	1,824	+4.46	+0.24%	7	87,116	1.3%	19.9	0.5%	21.0x	1.9x	UPGDCL	71,592	2.2%	6.2	6.0x	1.7x
Services & Real Estate	989	975	+13.97	+1.43%	9	54,389	0.8%	155.7	3.9%	17.3x	0.4x	BERGERPBL	69,780	2.1%	1.8	21.8x	4.0x
Engineering	2,298	2,263	+34.54	+1.53%	42	258,916	3.8%	622.4	15.5%	13.4x	0.7x	LHB	56,907	1.7%	10.9	14.0x	3.0x
Food & Allied	13,170	13,027	+143.55	+1.10%	21	241,406	3.5%	325.9	8.1%	19.3x	3.6x	BXPBARMA	47,288	1.4%	31.4	7.4x	1.0x
IT	1,644	1,634	+9.53	+0.58%	11	21,684	0.3%	143.1	3.6%	22.9x	1.3x	RENATA	44,755	1.4%	4.4	18.9x	1.3x
Textile	1,021	1,002	+19.41	+1.94%	58	106,362	1.6%	389.0	9.7%	70.7x	0.7x	UNILEVERCL	44,177	1.3%	0.3	61.1x	21.3x
Paper & Printing	4,487	4,285	+201.91	+4.71%	6	20,272	0.3%	183.0	4.5%	NM	1.1x	DUTCHBANGL	38,185	1.2%	8.3	7.7x	0.7x
Tannery	1,808	1,822	-13.93	-0.76%	6	20,926	0.3%	12.3	0.3%	NM	1.4x	PUBALIBANK	37,091	1.1%	2.3	6.0x	0.5x
Jute	12,298	11,819	+479.00	+4.05%	3	2,707	0.0%	66.2	1.6%	NM	NM	CITYBANK	36,509	1.1%	76.2	2.8x	0.6x
Ceramics	371	359	+12.94	+3.61%	5	16,666	0.2%	110.6	2.7%	NM	1.1x	EBL	35,906	1.1%	18.4	4.5x	0.8x
Miscellaneous	3,920	3,898	+21.60	+0.55%	15	213,028	3.1%	227.3	5.6%	99.9x	1.7x	ICB	34,777	1.1%	6.3	NM	1.1x
Corporate Bond**	16,677	16,805	-127.50	-0.76%	16	36,819	0.5%	0.0	0.0%	NM	NM	PRIMEBANK	31,800	1.0%	3.3	3.6x	0.7x
Treasury Bond**	2,307	2,308	-1.35	-0.06%	233	3,499,063	51.3%	0.7	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	+10.7%	0.5	NM	NM	SQURPHARMA	104,510	7.3%	7.1x	1.2x	SPCL	52.2	+7.0%	132.6	14.6x	1.3x
RAHIMAFOD	107.8	+10.0%	24.8	NM	11.3x	BRACBANK	73,520	5.2%	8.3x	1.3x	AFTABAUTO	37.3	+7.2%	130.2	NM	0.8x
FASFIN	1.0	+10.0%	0.4	NM	NM	BEXIMCO	69,465	4.9%	NM	1.3x	BRACBANK	65.6	-0.3%	119.1	8.3x	1.3x
PHOENIXFIN	2.2	+10.0%	1.1	NM	0.0x	ISLAMIBANK	62,516	4.4%	NM	0.8x	LOVELLO	82.6	+6.6%	114.1	47.1x	6.7x
FAREASTFIN	0.9	+10.0%	0.1	NM	NM	WALTONHIL	50,579	3.6%	11.1x	0.9x	KBPWBIL	63.1	+0.2%	110.5	NM	5.2x
PROGRESLIF	43.0	+9.97%	0.9	NM	NM	GP	38,875	2.7%	12.6x	7.5x	SQURPHARMA	202.2	-0.6%	95.1	7.1x	1.2x
MEGCONMILK	13.3	+9.9%	0.8	NM	NM	BATBC	36,336	2.6%	11.8x	2.4x	MONNOCERA	77.4	+5.0%	85.0	NM	1.0x
MEGHNAPET	20.0	+9.9%	0.5	NM	0.3x	BXPBARMA	34,505	2.4%	7.4x	1.0x	RUNNERAUTO	42.6	+9.8%	84.8	21.3x	0.6x
ILFSL	1.0	+9.9%	0.2	NM	NM	PUBALIBANK	25,230	1.8%	6.0x	0.5x	ORIONINFU	354.5	+1.1%	81.0	NM	21.4x
SONARGAON	25.6	+9.9%	11.9	NM	1.4x	CITYBANK	25,210	1.8%	2.8x	0.6x	SAPORTL	45.2	-0.2%	78.9	17.1x	1.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	18.9x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISNLTD	82.8	-4.8%	36.1	NM	34.5x	LHB	21,812	1.5%	14.0x	3.0x	KBPWBIL	69.3	69.2	7.0	800	55.43
SIMTEX	30.5	-4.4%	44.5	30.2x	1x	PRIMEBANK	20,145	1.4%	3.6x	0.7x	NBL	2.6	2.6	2.0	8,000	20.80
MERCINS	23.4	-3.1%	0.3	NM	NM	OLYMPIC	19,861	1.4%	14.2x	2.2x	NBL	2.6	2.6	2.0	8,000	20.80
ZEALBANGLA	81.1	-3.1%	0.3	NM	NM	ALARABANK	15,936	1.1%	44.1x	0.8x	LOVELLO	78.5	71.0	10.0	223	16.79
ICBAGRANI1	6.5	-3.0%	0.1	NM	0.9x	ROBI	15,347	1.1%	15.9x	2.2x	MONNOCERA	74.1	74.0	6.0	190	14.03
MBL1STMF	3.4	-2.9%	1.0	NM	0.4x	UTTARABANK	14,718	1.0%	NM	0.7x	FINEFOODS	275.0	265.0	6.0	40	10.82
BATASHOE	801.2	-2.5%	0.2	61.1x	3.7x	BEACONPHAR	14,601	1.0%	22.3x	3.4x	CITYGENINS	74.0	74.0	2.0	110	8.14
ACMELAB	72.5	-2.0%	10.1	6.1x	0.6x	UCB	13,924	1.0%	4.0x	0.4x	SIMTEX	30.0	30.0	1.0	200	6.00
NITOLINS	25.0	-1.6%	0.1	8.6x	0.8x	BSRMLTD	13,247	0.9%	3.7x	0.5x	RAHIMAFOD	90.0	90.0	3.0	34	3.07
TAKAFULINS	32.4	-1.5%	0.1	21.9x	1.7x						CENTRALINS	37.4	37.4	1.0	62	2.32
* 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																

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** 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
KBPPWBIL	69.3	69.2	55.4	800	7
NBL	2.6	2.6	20.8	8,000	2
NBL	2.6	2.6	20.8	8,000	2
LOVELLO	78.5	71.0	16.8	223	10
MONNOCERA	74.1	74.0	14.0	190	6
FINEFOODS	275.0	265.0	10.8	40	6
CITYGENINS	74.0	74.0	8.1	110	2
SIMTEX	30.0	30.0	6.0	200	1
RAHIMAFood	90.0	90.0	3.1	34	3
CENTRALINS	37.4	37.4	2.3	62	1
AFTABAUTO	37.5	36.0	1.9	52	2
SEAPEARL	35.0	30.7	1.6	49	2
ASIATICLAB	55.0	55.0	1.1	20	1
SALVOCHEM	28.2	28.1	1.0	36	2
RELIANCE1	14.3	14.3	0.7	50	1
CAPMBDBLMF	10.8	10.8	0.5	50	1
SAMORITA	74.5	74.5	0.5	7	1
Total			181.8		50

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DESCO		0.0%	0.0%	Record Date	20-Nov-25
MONNOFABR		0.0%	0.3%	Record Date	20-Nov-25
KOHINOOR		10.0%	65.0%	Record Date	20-Nov-25
TOSRIFA		0.0%	4.0%	Record Date	20-Nov-25
ADVENT		0.0%	0.5%	Record Date	20-Nov-25
HWAWELLTEX		0.0%	20.0%	Record Date	20-Nov-25
OAL		0.0%	0.0%	Record Date	20-Nov-25
MEGHNACEM		0.0%	0.0%	Record Date	20-Nov-25
GQBALLPEN		0.0%	10.0%	Record Date	20-Nov-25
KAY&QUE		6.0%	4.0%	Record Date	20-Nov-25
STYLECRAFT		0.0%	0.0%	Record Date	20-Nov-25
USMANIAGL		0.0%	0.0%	Record Date	20-Nov-25
SAIHAMTEX		0.0%	6.0%	Record Date	20-Nov-25
DOMINAGE		0.0%	0.4%	Record Date	20-Nov-25
AMBEEPHA		0.0%	10.0%	Record Date	20-Nov-25
ACMEPL		0.0%	0.0%	Record Date	20-Nov-25
INTECH		0.0%	0.0%	Record Date	20-Nov-25

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Important DSE News

INTRACO

The Board of Directors has recommended 1.25% Cash dividend only for General Shareholders (excluding Sponsors & Directors) for the year ended June 30, 2025. The quantities of securities held by the sponsors and directors: 30.06 million shares. The amount payable to the general securities holders is Tk. 8,588,032.00. Date of AGM: 30.12.2025, Time: 11:30 AM, Venue: Hybrid (Combination of Physical & Virtual platform). Record Date: 08.12.2025. The Company has also reported consolidated EPS of Tk. 0.86, consolidated NAV per share of Tk. 13.24 and consolidated NOCFPS of Tk. 0.24 for the year ended June 30, 2025 as against Tk. 0.88, Tk. 12.39 and Tk. 0.45 respectively for the year ended June 30, 2024.

ACMEPL

(Q1 Un-audited): EPS was Tk. (0.10) for July-September 2025 as against Tk. (0.12) for July-September 2024; NOCFPS was Tk. 0.02 for July-September 2025 as against Tk. 0.01 for July-September 2024. NAV per share was Tk. 16.31 as on September 30, 2025 and Tk. 17.45 as on September 30, 2024.

SONALIANS

The Board of Directors has recommended 15% Cash Dividend from its accumulated profit & current year profit for the year ended June 30, 2025. Date of AGM: 31.12.2025, Time: 11:30 AM, Venue: Virtual. Record Date: 10.12.2025. The Company has reported EPS of Tk. 8.79, NAV per share of Tk. 32.81, and NOCFPS of Tk. 9.11 for the year ended June 30, 2025, as against EPS of Tk. 3.23, NAV per share of Tk. 61.80, and NOCFPS of Tk. 7.71 for the year ended June 30, 2024.

(Q1 Un-audited): EPS was Tk. 1.78 for July-September 2025 as against Tk. 1.51 for July-September 2024; NOCFPS was Tk. 2.05 for July-September 2025 as against Tk. 5.72 for July-September 2024. NAV per share was Tk. 34.44 as on September 30, 2025 and Tk. 32.81 as on June 30, 2025.

GLOBALINS

(Q3 Un-audited): EPS was Tk. 0.32 for July-September 2025 as against Tk. 0.30 for July-September 2024; EPS was Tk. 0.99 for January-September 2025 as against Tk. 0.95 for January-September 2024. NOCFPS was Tk. 0.14 for January-September 2025 as against Tk. 0.12 for January-September 2024. NAV per share was Tk. 14.53 as on September 30, 2025 and Tk. 14.91 as on September 30, 2024.

CITYBANK

Referring to their earlier news disseminated by DSE on 26.10.2025, the company has now informed that it has received request from Ms. Meherun Haque, one of the four legal heirs, for the transmission of her entitled portion of the 2024 stock dividend. As such, Ms. Meherun Haque, daughter of Late Mr. Deen Mohammad and a General Shareholder of the company, will receive 1,758,014 shares as per Succession Certificate of the Honorable Court.

PEOPLESINS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Peoples Insurance PLC.' instead of 'Peoples Insurance Company Limited' with effect from November 20, 2025. Other information (except name) will remain unchanged.

PROVATIINS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Provati Insurance PLC.' instead of 'Provati Insurance Company Limited' with effect from November 20, 2025. Other information (except name) will remain unchanged.