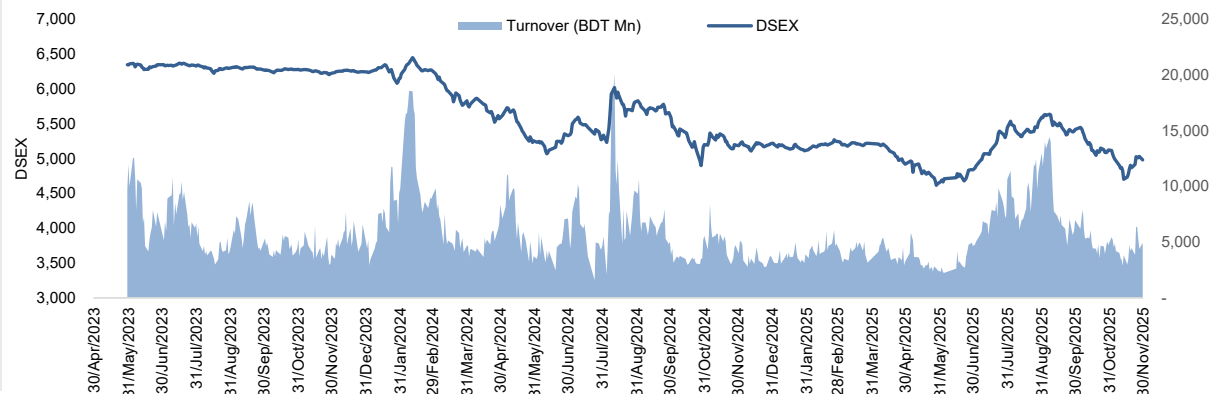


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.98%) lost 49.37 points and closed at 4,978.77. The blue-chip index DS30 (-0.88%), the Shariah-based index DSES (-1.09%), and the large-cap index CDSET (-0.69%) closed at 1,917.02, 1,045.30, and 1,031.20 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.39% followed by Fuel & Power (-2.02%), Engineering (-1.19%), Food & Allied (-0.98%), Bank (-0.74%), Pharmaceutical (-0.58%), and Telecommunication (-0.28%), respectively. Block trades contributed 2.1% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (-1.7%) was the most traded share with a turnover of BDT 172 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,978.77	5,028.14	-49.37	-0.98%	-4.6%
DS30	1,917.02	1,934.11	-17.09	-0.88%	-1.2%
DSES	1,045.30	1,056.84	-11.54	-1.09%	-10.6%
CDSET	1,031.20	1,038.36	-7.16	-0.69%	-3.3%

	Advanced	Declined	Unchanged	Total
All Category	57	306	28	391
A Category (Equity)	29	171	15	215
B Category (Equity)	12	63	4	79
N Category (Equity)	0	0	0	0
Z Category (Equity)	16	72	9	97
Mutual Funds	4	23	8	35
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,850,939	6,921,334	-1.0%
	Mn USD	56,032	56,608	
Turnover	Mn BDT	4,925	4,394	+12.1%
	Mn USD	40	36	
Volume	Mn Shares	157	149	+4.9%
No. of Trade		175,731	158,142	+11.1%

* Average Interbank Exchange Rate is BDT 122.27 as of Nov 30, 2025

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Figure: Sectorial Turnover (BDT Mn)

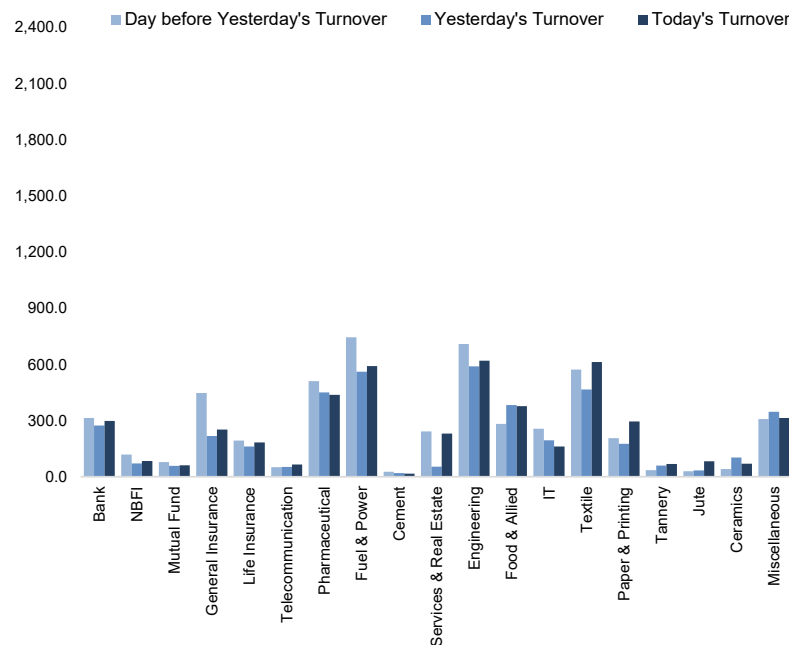
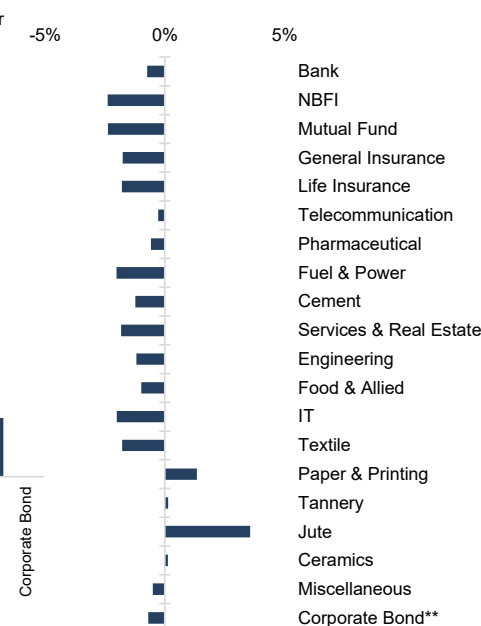


Figure: Sectorial Mcap Change



Market PE 14.1x

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	1,393	1,403	-10.32	-0.74%	36	659,158	9.7%	298.3	6.2%	NM	1.0x	GP	377,409	11.3%	8.5	12.8x	7.6x
NBFI	910	932	-22.28	-2.39%	23	86,706	1.3%	84.0	1.7%	NM	NM	SQURPHARMA	181,279	5.4%	31.7	7.2x	1.2x
Mutual Fund	492	504	-11.98	-2.38%	37	23,571	0.3%	60.6	1.3%	NM	0.5x	ROBI	147,710	4.4%	49.8	16.0x	2.2x
General Insurance	2,815	2,865	-50.38	-1.76%	43	80,339	1.2%	252.6	5.2%	13.3x	1.2x	BATBC	135,648	4.1%	18.6	11.8x	2.4x
Life Insurance	1,693	1,724	-30.88	-1.79%	15	45,038	0.7%	183.3	3.8%	NM	NM	BRACBANK	131,003	3.9%	25.0	8.3x	1.3x
Telecommunication	4,685	4,698	-13.02	-0.28%	3	549,340	8.1%	65.8	1.4%	13.5x	4.1x	WALTONHIL	126,058	3.8%	5.1	11.2x	0.9x
Pharmaceutical	2,855	2,872	-16.69	-0.58%	34	541,327	8.0%	436.6	9.1%	11.6x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,058	1,080	-21.80	-2.02%	23	280,272	4.1%	591.0	12.3%	9.1x	0.6x	MARICO	86,159	2.6%	5.8	13.9x	28.9x
Cement	1,860	1,883	-23.22	-1.23%	7	88,643	1.3%	16.3	0.3%	21.4x	1.9x	UPGDCL	70,433	2.1%	5.4	6.6x	1.5x
Services & Real Estate	993	1,011	-18.48	-1.83%	9	54,598	0.8%	230.9	4.8%	17.4x	0.4x	BERGERPBL	69,843	2.1%	1.1	21.9x	4.0x
Engineering	2,325	2,353	-27.97	-1.19%	42	262,031	3.9%	619.3	12.8%	13.6x	0.7x	LHB	58,765	1.8%	7.0	14.5x	3.1x
Food & Allied	13,119	13,248	-129.78	-0.98%	21	240,455	3.5%	376.2	7.8%	19.2x	3.6x	BXPBARMA	49,741	1.5%	13.8	7.8x	1.0x
IT	1,725	1,761	-35.25	-2.00%	11	22,758	0.3%	161.6	3.4%	24.0x	1.4x	RENATA	46,590	1.4%	4.7	19.7x	1.3x
Textile	1,060	1,079	-19.20	-1.78%	58	110,407	1.6%	612.9	12.7%	73.4x	0.7x	UNILEVERCL	43,708	1.3%	0.1	60.5x	21.1x
Paper & Printing	4,698	4,636	+62.38	+1.35%	6	21,225	0.3%	295.4	6.1%	NM	1.2x	PUBALIBANK	38,262	1.1%	5.4	6.2x	0.5x
Tannery	1,879	1,876	+2.63	+0.14%	6	21,749	0.3%	68.8	1.4%	NM	1.4x	DUTCHBANGL	37,895	1.1%	31.0	7.7x	0.7x
Jute	12,282	11,860	+422.13	+3.56%	3	2,703	0.0%	82.8	1.7%	NM	NM	CITYBANK	36,814	1.1%	37.8	2.8x	0.6x
Ceramics	384	383	+0.48	+0.13%	5	17,224	0.3%	70.3	1.5%	NM	1.1x	EBL	36,225	1.1%	21.2	4.6x	0.8x
Miscellaneous	3,939	3,959	-19.75	-0.50%	15	214,074	3.2%	313.7	6.5%	NM	1.7x	ICB	33,216	1.0%	4.4	NM	1.1x
Corporate Bond**	16,847	16,964	-116.63	-0.69%	16	37,195	0.5%	0.9	0.0%	NM	NM	PRIMEBANK	33,193	1.0%	14.9	3.8x	0.7x
Treasury Bond**	2,253	2,280	-26.87	-1.18%	233	3,430,544	50.5%	1.0	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
ZEALBANGLA	90.6	+10.0%	0.6	NM	NM	SQURPHARMA	104,510	7.3%	7.2x	1.2x	KBPPWBIL	67.4	-1.7%	171.8	NM	5.5x
KPPL	18.0	+9.8%	28.8	NM	NM	BRACBANK	73,520	5.2%	8.3x	1.3x	SAPORTL	45.0	-3.2%	156.7	17.0x	1.2x
BDTHAIFOOD	11.6	+9.4%	13.9	NM	1.0x	BEXIMCO	69,465	4.9%	NM	1.3x	DOMINAGE	24.2	-	131.8	NM	1.4x
REGENTTEX	2.8	+7.7%	0.7	NM	0.1x	ISLAMIBANK	62,516	4.4%	NM	0.8x	ORIONINFU	389.0	-1.3%	117.0	NM	23.4x
GHCL	23.2	+6.4%	7.8	NM	0.3x	WALTONHIL	50,579	3.6%	11.2x	0.9x	SPCL	52.1	-3.5%	116.4	14.6x	1.3x
MEGHNACEM	30.2	+6.34%	1.0	NM	NM	GP	38,875	2.7%	12.8x	7.6x	SIMTEX	29.8	-10.0%	105.7	29.5x	1.3x
RAHIMAFOD	142.6	+5.6%	85.7	NM	15x	BATBC	36,336	2.6%	11.8x	2.4x	EASTRNLUB	2,564.4	+0.1%	100.1	48.1x	12.2x
WATACHEM	124.7	+5.2%	14.5	NM	2.0x	BXPHARMA	34,505	2.4%	7.8x	1.0x	SONALIPAPR	234.9	+2.6%	99.1	28.5x	1.5x
HAKKANIPUL	71.9	+5.1%	73.3	NM	3.0x	PUBALIBANK	25,230	1.8%	6.2x	0.5x	ANWARGALV	94.2	-2.6%	94.8	NM	22.2x
ISLAMICFIN	8.6	+4.9%	9.6	NM	NM	CITYBANK	25,210	1.8%	2.8x	0.6x	CVOPRL	168.7	+3.2%	92.8	35.3x	5.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	19.7x	1.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
LRBDL	10.3	-18.9%	13.6	NM	0.3x	LHB	21,812	1.5%	14.5x	3.1x	FINEFOODS	318.0	305.0	5.0	55	17.00
PREMIERLEA	0.9	-10.0%	0.1	NM	NM	PRIMEBANK	20,145	1.4%	3.8x	0.7x	DUTCHBANGL	40.5	40.0	10.0	370	14.93
PLFSL	0.8	-10.0%	0.1	NM	NM	OLYMPIC	19,861	1.4%	14.0x	2.2x	DUTCHBANGL	40.5	40.0	10.0	370	14.93
FAREASTFIN	0.9	-10.0%	0.1	NM	NM	ALARABANK	15,936	1.1%	43.8x	0.8x	CITYGENINS	83.0	69.2	3.0	121	9.19
SIMTEX	29.8	-10.0%	105.7	29.5x	1.3x	ROBI	15,347	1.1%	16.0x	2.2x	EBL	22.7	22.7	1.0	354	8.04
MAKSONSPIN	5.8	-9.4%	1.6	NM	0.8x	UTTARABANK	14,718	1.0%	NM	0.7x	SIMTEX	33.1	29.8	5.0	154	4.79
ILFSL	1.0	-9.1%	0.0	NM	NM	BEACONPHAR	14,601	1.0%	22.5x	3.5x	ACI	192.0	192.0	1.0	22	4.22
GSPFINANCE	2.1	-8.7%	0.2	NM	NM	UCB	13,924	1.0%	4.1x	0.4x	BANKASIA	18.6	18.6	1.0	160	2.98
APOLOISPAT	2.2	-8.3%	0.8	NM	0.1x	BSRMLTD	13,247	0.9%	3.7x	0.5x	SALVOCHEM	32.8	28.3	5.0	95	2.96
AIBL1STIMF	3.4	-8.1%	3.0	NM	0.4x						ASIATICLAB	54.1	53.9	2.0	40	2.16

* 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

* 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	318.0	305.0	17.0	55	5
DUTCHBANGL	40.5	40.0	14.9	370	10
DUTCHBANGL	40.5	40.0	14.9	370	10
CITYGENINS	83.0	69.2	9.2	121	3
EBL	22.7	22.7	8.0	354	1
SIMTEX	33.1	29.8	4.8	154	5
ACI	192.0	192.0	4.2	22	1
BANKASIA	18.6	18.6	3.0	160	1
SALVOCHEM	32.8	28.3	3.0	95	5
ASIATICLAB	54.1	53.9	2.2	40	2
SHYAMPSUG	200.0	166.0	2.1	12	2
SQURPHARMA	222.8	204.7	2.0	10	2
SAIHAMCOT	19.2	19.2	1.9	101	1
LOVELLO	77.0	77.0	1.9	25	1
ORIONINFU	376.0	376.0	1.9	5	1
AMANFEED	26.3	26.3	1.8	70	1
SPCL	59.0	55.4	1.8	30	2
BEACONPHAR	120.5	99.0	1.3	12	2
JAMUNABANK	19.4	19.4	1.2	60	1
AFTABAUTO	38.0	38.0	0.9	24	1
MEGHNALIFE	45.0	45.0	0.8	18	1
PIONEERINS	44.5	44.5	0.8	18	1
Total			103.2		54

Important DSE News
LRBDL

The Board of Directors has recommended No Dividend for the year ended June 30, 2025. Date of AGM: 28.12.2025, Time: 12:30 PM, Venue: Will be notified at AGM notice, Mode: Hybrid System, Link: <https://lrbdl23.digitalagmbd.net>. Record Date: 21.12.2025. The Company has reported EPS of Tk. (4.56), NAV per share of Tk. 32.72 (with revaluation), NAV per share of Tk. 28.75 (without revaluation) and NOCFPS of Tk. 1.97 for the year ended June 30, 2025 as against Tk. (0.74), Tk. 37.42 (with revaluation), 33.44 (without revaluation) and Tk. 3.04 respectively for the year ended June 30, 2024.

SOUTHEASTB

The company has informed that the Board of Directors of the company in its meeting held on August 21, 2025, appointed Mr. Md. Khalid Mahmood khan as the Managing Director of the company. Subsequently, Bangladesh Bank vide their letter dated November 03, 2025 accorded its consent for appointment of Mr. Md. Khalid Mahmood Khan as the Managing Director of the company with effect from 27th November 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ACFL		0.0%	10.0%	Record Date	1-Dec-25
AMANFEED		0.0%	11.5%	Record Date	1-Dec-25
SILVAPHL		0.0%	0.0%	Record Date	1-Dec-25
POWERGRID		0.0%	0.0%	Record Date	1-Dec-25
ORIONINFU		0.0%	20.0%	Record Date	1-Dec-25
ESQUIRENIT		0.0%	10.0%	Record Date	2-Dec-25
SONALILIFE		0.0%	15.0%	Record Date	2-Dec-25
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

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