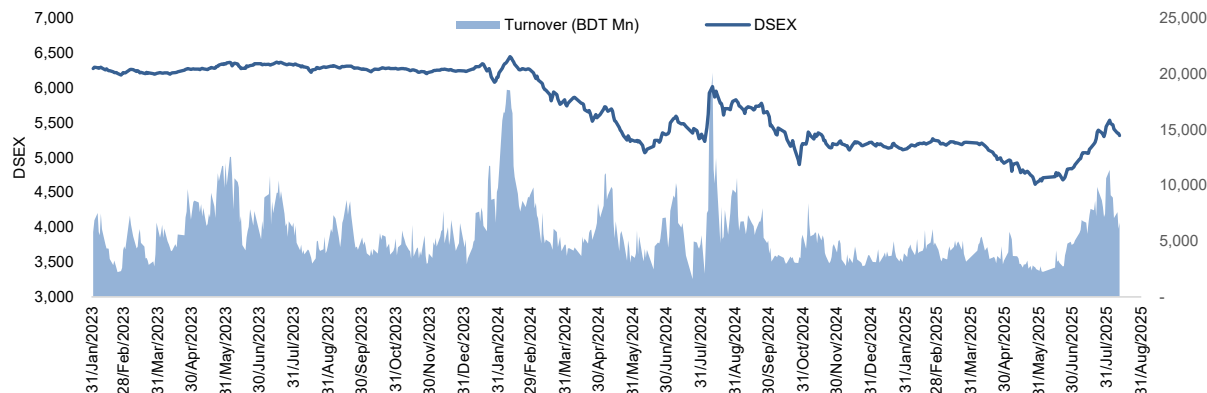


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.54%) lost 28.6 points and closed at 5,315.45. The blue-chip index DS30 (-0.76%), the Shariah-based index DSES (-0.82%), and the large-cap index CDSET (-0.52%) closed at 2,051.30, 1,152.51, and 1,093.50 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.99% followed by Fuel & Power (-0.88%), Food & Allied (-0.71%), Bank (-0.67%), Engineering (-0.48%), Telecommunication (-0.41%), and Pharmaceutical (-0.15%), respectively. Block trades contributed 6.7% of the overall market turnover. Orion Infusion Ltd. (+4.6%) was the most traded share with a turnover of BDT 259 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,315.45	5,344.05	-28.60	-0.54%	+1.9%
DS30	2,051.30	2,067.03	-15.73	-0.76%	+5.8%
DSES	1,152.51	1,162.08	-9.57	-0.82%	-1.4%
CDSET	1,093.50	1,099.17	-5.67	-0.52%	+2.6%

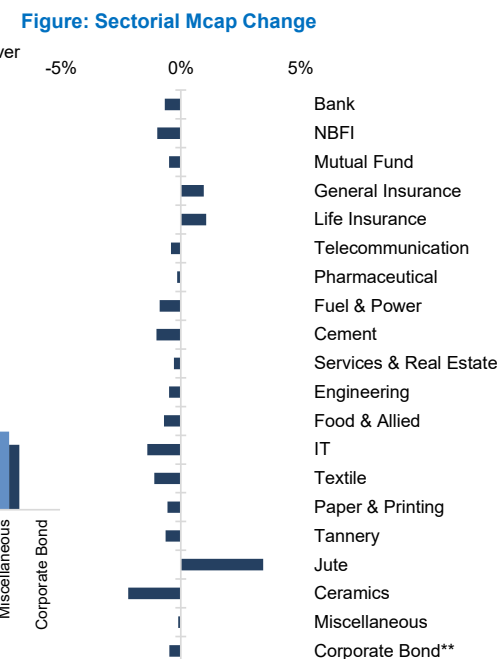
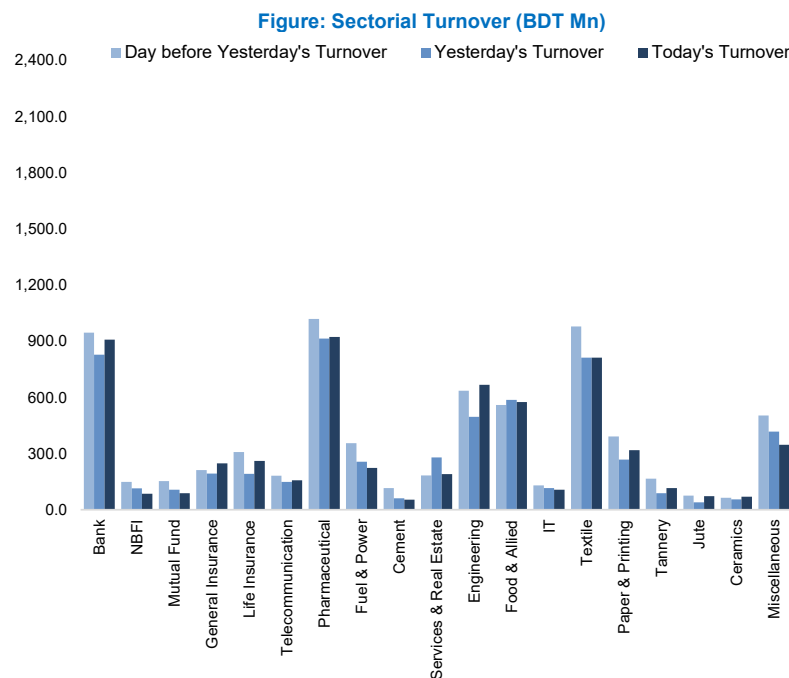
	Advanced	Declined	Unchanged	Total
All Category	115	222	60	397
A Category (Equity)	65	124	29	218
B Category (Equity)	29	46	8	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	21	52	23	96
Mutual Funds	6	16	14	36
Corporate Bonds	0	1	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,106,525	7,118,375	-0.2%
	Mn USD	58,490	58,588	
Turnover	Mn BDT	6,665	6,109	+9.1%
	Mn USD	55	50	
Volume	Mn Shares	206	195	+5.5%
No. of Trade		202,671	195,303	+3.8%

* Average Interbank Exchange Rate is BDT 121.50 as of Aug 12, 2025

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Market PE 16.1x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, ABBANK, IFIC, FIRSTSBANK and NBL

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	1,529	1,539	-10.26	-0.67%	36	723,270	10.2%	908.5	14.6%	NM	0.8x	GP	425,750	11.8%	48.9	14.5x	7.5x
NBFI	1,065	1,075	-10.61	-0.99%	23	101,439	1.4%	84.8	1.4%	NM	NM	SQURPHARMA	200,338	5.6%	91.5	8.5x	1.5x
Mutual Fund	588	590	-2.90	-0.49%	37	28,159	0.4%	87.8	1.4%	NM	0.5x	BATBC	155,844	4.3%	45.1	12.6x	2.9x
General Insurance	2,679	2,654	+25.49	+0.96%	43	76,464	1.1%	247.8	4.0%	12.9x	1.1x	ROBI	140,377	3.9%	49.8	16.1x	2.2x
Life Insurance	1,841	1,822	+19.38	+1.06%	15	48,969	0.7%	261.2	4.2%	NM	NM	BRACBANK	136,976	3.8%	167.6	9.7x	1.6x
Telecommunication	5,065	5,086	-20.84	-0.41%	3	593,958	8.3%	156.7	2.5%	15.1x	4.3x	WALTONHIL	135,742	3.8%	4.4	10.5x	1.2x
Pharmaceutical	3,057	3,061	-4.65	-0.15%	34	579,542	8.1%	922.2	14.8%	13.3x	1.6x	BEXIMCO	103,850	2.9%	0.1	NM	1.3x
Fuel & Power	1,147	1,157	-10.17	-0.88%	23	303,851	4.3%	223.7	3.6%	19.2x	0.6x	MARICO	89,973	2.5%	7.6	14.7x	27.0x
Cement	2,042	2,062	-20.86	-1.01%	7	97,290	1.4%	53.8	0.9%	22.4x	2.1x	UPGDCL	79,360	2.2%	9.1	6.8x	1.9x
Services & Real Estate	989	992	-2.83	-0.29%	9	54,393	0.8%	189.8	3.1%	25.0x	0.4x	BERGERPBL	76,267	2.1%	20.6	21.7x	4.4x
Engineering	2,477	2,489	-12.07	-0.48%	42	279,381	3.9%	667.5	10.7%	13.2x	0.8x	LHB	64,456	1.8%	33.5	17.2x	3.4x
Food & Allied	14,869	14,975	-105.69	-0.71%	21	272,069	3.8%	574.7	9.2%	20.6x	4.3x	RENATA	56,488	1.6%	18.0	20.1x	1.6x
IT	1,789	1,815	-25.33	-1.40%	11	23,599	0.3%	107.3	1.7%	19.9x	1.5x	BXPHARMA	49,295	1.4%	51.7	7.7x	1.0x
Textile	1,114	1,127	-12.47	-1.11%	58	116,021	1.6%	812.4	13.1%	NM	0.8x	UNILEVERCL	47,879	1.3%	0.2	75.4x	26.3x
Paper & Printing	4,622	4,648	-26.05	-0.56%	6	20,882	0.3%	317.4	5.1%	NM	1.0x	ICB	42,062	1.2%	7.7	NM	1.0x
Tannery	2,052	2,065	-13.13	-0.64%	6	22,866	0.3%	115.0	1.8%	NM	1.7x	DUTCHBANGL	42,051	1.2%	6.1	11.2x	0.8x
Jute	12,805	12,379	+426.21	+3.44%	3	2,819	0.0%	71.9	1.2%	NM	NM	EBL	40,374	1.1%	8.8	5.8x	0.9x
Ceramics	390	399	-8.77	-2.20%	5	17,500	0.2%	69.2	1.1%	NM	1.1x	PUBALIBANK	37,351	1.0%	17.0	5.1x	0.6x
Miscellaneous	4,145	4,150	-4.31	-0.10%	15	225,104	3.2%	346.1	5.6%	85.9x	1.8x	CITYBANK	35,597	1.0%	112.7	3.3x	0.7x
Corporate Bond**	16,140	16,217	-77.60	-0.48%	16	35,632	0.5%	0.6	0.0%	NM	NM	OLYMPIC	32,570	0.9%	36.8	17.6x	2.7x
Treasury Bond**	2,219	2,212	+6.77	+0.31%	235	3,490,090	49.1%	0.0	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
YPL	16.5	+9.3%	32.2	NM	3.1x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	ORIONINFU	413.8	+4.6%	259.1	NM	26.3x
SILVAPHL	11.8	+9.3%	54.2	NM	0.7x	ISLAMIBANK	74,730	5.3%	15.7x	1.0x	BRACBANK	68.8	+0.7%	167.6	9.7x	1.6x
JUTESPINN	224.9	+8.8%	1.4	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	BSC	112.8	-3.8%	154.4	5.7x	1.1x
PRAGATILIF	135.5	+8.7%	79.5	NM	NM	BATBC	50,233	3.6%	12.6x	2.9x	LOVELLO	84.9	-0.9%	141.8	38.3x	6.7x
MITHUNKNIT	19.1	+8.5%	24.0	NM	6.0x	WALTONHIL	46,773	3.3%	10.5x	1.2x	MALEKSPIN	28.9	-4.6%	130.7	3.9x	0.5x
DOMINAGE	13.7	+7.87%	88.7	97.9x	0.8x	BRACBANK	46,489	3.3%	9.7x	1.6x	HAKKANIPUL	82.3	+4.3%	114.3	NM	3.4x
ANWARGALV	83.9	+6.7%	110.3	NM	42x	GP	44,708	3.2%	14.5x	7.5x	CITYBANK	23.4	-0.8%	112.7	3.3x	0.7x
SONARGAON	35.6	+6.3%	89.1	NM	1.9x	RENATA	32,968	2.3%	20.1x	1.6x	ANWARGALV	83.9	+6.7%	110.3	NM	42.0x
STYLECRAFT	85.6	+6.1%	59.1	NM	14.8x	BXPHARMA	23,409	1.7%	7.7x	1.0x	SONALIPAPR	185.0	+1.0%	106.7	17.9x	1.1x
REGENTTEX	3.5	+6.1%	0.2	NM	0.1x	PUBALIBANK	22,905	1.6%	5.1x	0.6x	BEACHHATCH	47.7	-1.2%	103.5	10.2x	2.9x
						CITYBANK	21,020	1.5%	3.3x	0.7x						
						LHB	20,953	1.5%	17.2x	3.4x						
						OLYMPIC	20,496	1.5%	17.6x	2.7x						
						ALARABANK	18,282	1.3%	38.2x	0.8x						
						BEACONPHAR	17,838	1.3%	28.8x	3.8x						
						PRIMEBANK	16,142	1.1%	3.8x	0.8x						
						ROBI	14,876	1.1%	16.1x	2.2x						
						UTTARABANK	13,699	1.0%	NM	0.8x						
						NBL	13,055	0.9%	NM	NM						
						BSRMLTD	12,852	0.9%	5.0x	0.5x						
						* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
						** 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										

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

** 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
ORIONINFU	400.1	363.5	222.5	594	24
FINEFOODS	263.0	247.2	87.6	336	14
BRACBANK	69.7	69.7	27.8	399	1
TRUSTBANK	20.0	19.9	27.3	1,369	14
KBPPWBIL	120.0	120.0	24.0	200	1
MARICO	2,750.0	2,750.0	13.8	5	1
SAMATALETH	96.5	80.0	8.4	98	4
SOUTHEASTB	10.2	10.2	4.8	470	2
TILIL	56.0	51.3	4.6	88	4
EIL	34.4	34.4	2.6	75	1
AMCL(PRAN)	246.1	246.1	2.2	9	1
CITYGENINS	53.8	52.8	1.8	34	2
ACMEPL	16.1	16.1	1.6	100	1
KAY&QUE	312.0	312.0	1.6	5	1
HAKKANIPUL	71.5	71.5	1.5	22	1
ASIATICLAB	48.0	48.0	1.4	30	2
AL-HAJTEX	128.0	128.0	1.4	11	1
AMANFEED	24.2	24.2	1.2	49	1
MEGHNALIFE	60.9	60.9	1.2	19	1
LOVELLO	93.0	93.0	1.1	12	1
IFIC	6.4	6.4	1.0	150	1
NCCBANK	13.5	13.5	0.9	70	1
Total			446.9		90

Important DSE News

CONTININS

The Board of Directors of the Company has elected Mr. K.M. Alamgir as Chairman of the company.

ABBANK

The Board of the company has appointed Mr. Manzurul Ahsan, FCS as Company Secretary with effect from August 12, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
NATLIFEINS		0.0%	0.0%	Record Date	13-Aug-25
PRAGATILIF		0.0%	110.0%	Record Date	17-Aug-25
MARICO		0.0%	35.0%	Record Date	19-Aug-25
CAPITECGBF		0.0%	15.0%	Record Date	21-Aug-25
SANDHANINS		0.0%	600.0%	Record Date	24-Aug-25
AGRANINS		0.0%	3.3%	Record Date	24-Aug-25

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