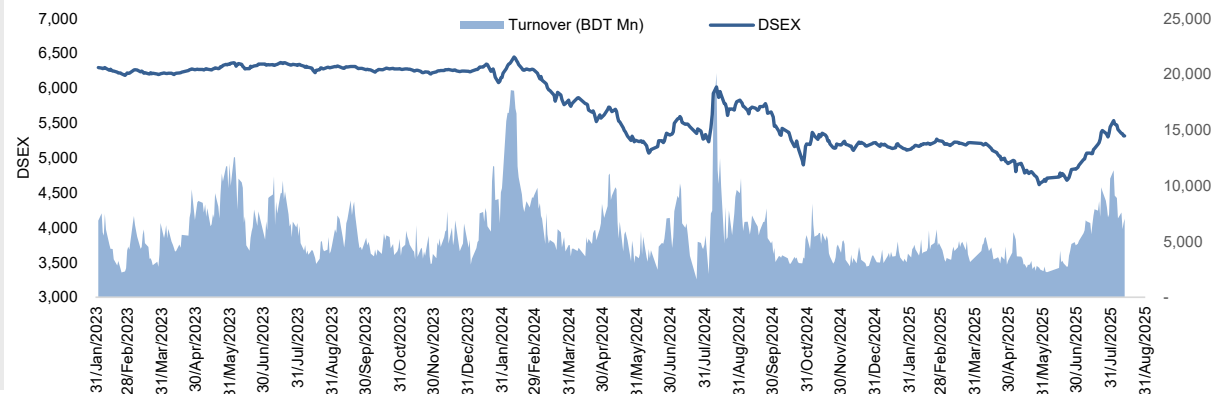


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 1.12 points and closed at 5,314.33. The blue-chip index DS30 (+0.29%), the Shariah-based index DSES (+0.29%), and the large-cap index CDSET (+0.00%) closed at 2,057.16, 1,155.82, and 1,093.55 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.64% followed by Pharmaceutical (+0.54%), Fuel & Power (+0.21%), Telecommunication (+0.11%), NBFI (+0.06%), Engineering (+0.00%), and Bank (-0.84%), respectively. Block trades contributed 1.4% of the overall market turnover. Orion Infusion Ltd. (+8.5%) was the most traded share with a turnover of BDT 546 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,314.33	5,315.45	-1.12	-0.02%	+1.9%
DS30	2,057.16	2,051.30	+5.87	+0.29%	+6.1%
DSES	1,155.82	1,152.51	+3.31	+0.29%	-1.1%
CDSET	1,093.55	1,093.50	+0.05	+0.00%	+2.6%

	Advanced	Declined	Unchanged	Total
All Category	121	203	74	398
A Category (Equity)	70	115	34	219
B Category (Equity)	29	38	16	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	22	50	24	96
Mutual Funds	3	20	13	36
Corporate Bonds	1	1	1	3
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,104,087	7,106,525	-0.0%
	Mn USD	58,474	58,494	
Turnover	Mn BDT	7,049	6,665	+5.8%
	Mn USD	58	55	
Volume	Mn Shares	215	206	+4.4%
No. of Trade		212,926	202,671	+5.1%

* Average Interbank Exchange Rate is BDT 121.49 as of Aug 13, 2025

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Figure: Sectorial Turnover (BDT Mn)

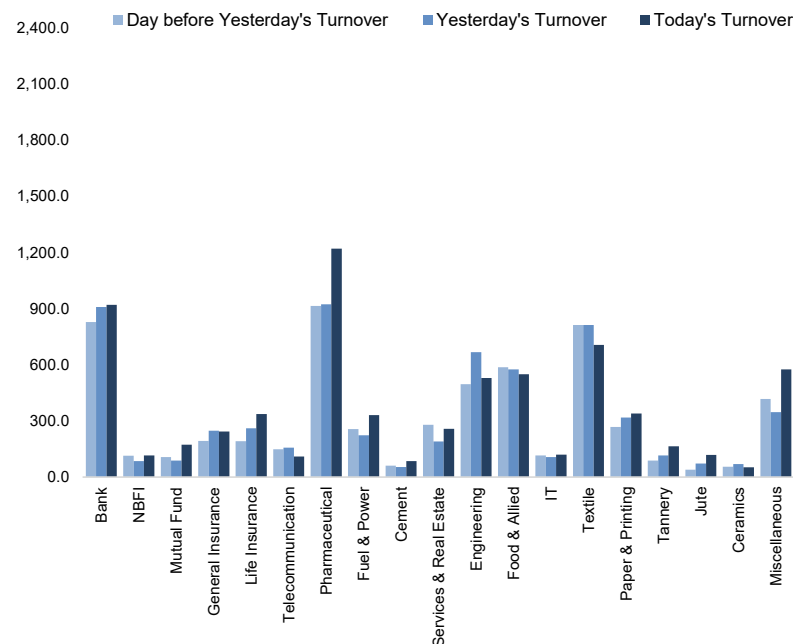
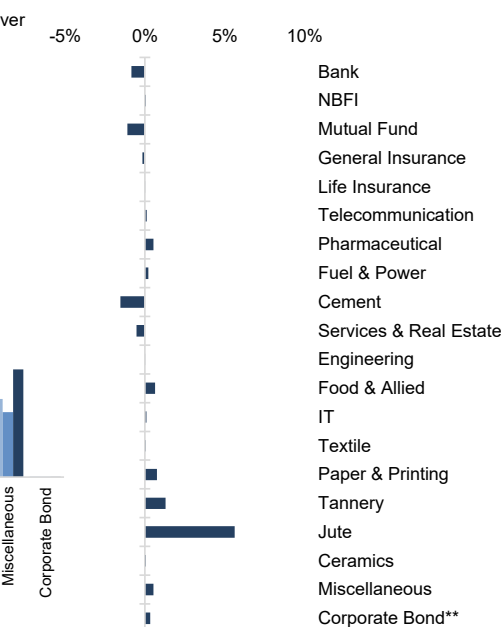


Figure: Sectorial Mcap Change



Market PE 17.7x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, 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	1,516	1,529	-12.77	-0.84%	36	717,230	10.1%	919.9	13.2%	NM	0.8x	GP	425,750	11.8%	0.0	14.5x	7.5x
NBFI	1,065	1,065	+0.61	+0.06%	23	101,498	1.4%	116.1	1.7%	NM	NM	SQURPHARMA	199,717	5.5%	68.4	8.5x	1.5x
Mutual Fund	581	588	-6.39	-1.09%	37	27,853	0.4%	173.1	2.5%	NM	0.5x	BATBC	156,924	4.3%	23.7	12.6x	2.9x
General Insurance	2,675	2,679	-4.04	-0.15%	43	76,349	1.1%	243.1	3.5%	12.8x	1.1x	ROBI	140,377	3.9%	40.9	16.1x	2.2x
Life Insurance	1,841	1,841	+0.27	+0.01%	15	48,976	0.7%	336.5	4.8%	NM	NM	BRACBANK	136,378	3.8%	199.6	9.6x	1.6x
Telecommunication	5,071	5,065	+5.74	+0.11%	3	594,631	8.4%	109.5	1.6%	15.1x	4.3x	WALTONHIL	135,136	3.7%	4.2	10.5x	1.2x
Pharmaceutical	3,073	3,057	+16.36	+0.54%	34	582,644	8.2%	1,219.2	17.5%	13.4x	1.6x	BEXIMCO	103,850	2.9%	0.2	NM	1.3x
Fuel & Power	1,149	1,147	+2.42	+0.21%	23	304,492	4.3%	331.6	4.8%	19.2x	0.6x	MARICO	90,906	2.5%	5.4	14.8x	27.3x
Cement	2,010	2,042	-31.48	-1.54%	7	95,790	1.3%	86.0	1.2%	22.1x	2.1x	UPGDCL	78,954	2.2%	8.9	6.8x	1.9x
Services & Real Estate	984	989	-5.16	-0.52%	9	54,109	0.8%	258.2	3.7%	24.9x	0.4x	BERGERPBL	76,129	2.1%	10.6	21.7x	4.4x
Engineering	2,477	2,477	+0.08	+0.00%	42	279,390	3.9%	528.6	7.6%	13.2x	0.8x	LHB	63,411	1.8%	51.9	16.9x	3.3x
Food & Allied	14,964	14,869	+94.78	+0.64%	21	273,803	3.9%	548.8	7.9%	20.7x	4.3x	RENATA	56,236	1.6%	14.7	20.0x	1.6x
IT	1,791	1,789	+1.85	+0.10%	11	23,624	0.3%	119.4	1.7%	19.9x	1.5x	BXPHARMA	50,188	1.4%	89.8	7.8x	1.0x
Textile	1,115	1,114	+0.53	+0.05%	58	116,076	1.6%	705.0	10.1%	NM	0.8x	UNILEVERCL	47,681	1.3%	0.5	75.1x	26.1x
Paper & Printing	4,657	4,622	+35.11	+0.76%	6	21,041	0.3%	338.9	4.9%	NM	1.0x	ICB	43,016	1.2%	19.4	NM	1.0x
Tannery	2,079	2,052	+26.69	+1.30%	6	23,164	0.3%	164.5	2.4%	NM	1.7x	DUTCHBANGL	41,278	1.1%	7.3	11.0x	0.8x
Jute	13,525	12,805	+720.44	+5.63%	3	2,977	0.0%	118.9	1.7%	NM	NM	EBL	40,214	1.1%	6.5	5.8x	0.9x
Ceramics	390	390	+0.26	+0.07%	5	17,512	0.2%	52.3	0.8%	NM	1.1x	PUBALIBANK	37,221	1.0%	10.4	5.1x	0.6x
Miscellaneous	4,168	4,145	+22.20	+0.54%	15	226,310	3.2%	575.0	8.3%	86.4x	1.8x	CITYBANK	35,140	1.0%	129.5	3.2x	0.6x
Corporate Bond**	16,194	16,140	+54.69	+0.34%	16	35,753	0.5%	0.2	0.0%	NM	NM	OLYMPIC	33,290	0.9%	52.5	18.0x	2.8x
Treasury Bond**	2,221	2,219	+1.44	+0.06%	235	3,487,636	49.0%	8.0	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
GEMINISEA	172.8	+10.0%	49.5	NM	14.0x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	ORIONINFU	449.0	+8.5%	546.1	NM	28.6x
STANCERAM	88.8	+9.9%	3.1	NM	NM	ISLAMIBANK	74,730	5.3%	15.4x	1.0x	BSC	118.4	+5.0%	299.5	6.0x	1.2x
LEGACYFOOT	67.7	+9.7%	99.8	NM	6.1x	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	68.5	-0.4%	199.6	9.6x	1.6x
ORIONINFU	449.0	+8.5%	546.1	NM	28.6x	BATBC	50,233	3.6%	12.6x	2.9x	KBPPWBIL	120.5	+5.5%	165.2	NM	10.1x
CVOPRL	152.5	+7.6%	108.0	56.9x	12.8x	WALTONHIL	46,773	3.3%	10.5x	1.2x	RAHIMAFOOD	153.8	-7.8%	156.8	NM	16.7x
FAREASTFIN	3.2	+6.67%	0.1	NM	NM	BRACBANK	46,489	3.3%	9.6x	1.6x	CITYBANK	23.1	-1.3%	129.5	3.2x	0.6x
SONALIANSH	215.3	+6.6%	113.8	NM	3x	GP	44,708	3.2%	14.5x	7.5x	SEAPEARL	55.8	+3.0%	125.1	NM	3.4x
AL-HAJTEX	138.1	+6.4%	52.4	NM	16.3x	RENATA	32,968	2.3%	20.0x	1.6x	ASIATICLAB	48.7	+2.1%	119.2	20.2x	0.9x
MEGCONMILK	18.7	+5.6%	2.7	NM	NM	BXPHARMA	23,409	1.7%	7.8x	1.0x	SONALIANSH	215.3	+6.6%	113.8	NM	3.2x
KBPPWBIL	120.5	+5.5%	165.2	NM	10.1x	PUBALIBANK	22,905	1.6%	5.1x	0.6x	MALEKSPIN	30.0	+3.8%	111.3	4.1x	0.5x
						CITYBANK	21,020	1.5%	3.2x	0.6x						
						LHB	20,953	1.5%	16.9x	3.3x						
						OLYMPIC	20,496	1.5%	18.0x	2.8x						
						ALARABANK	18,282	1.3%	38.0x	0.8x						
						BEACONPHAR	17,838	1.3%	29.5x	3.9x						
						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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEMLLECMF	7.1	-9.0%	55.1	NM	0.8x						TILIL	56.0	55.5	3.0	227	12.61
RAHIMAFOOD	153.8	-7.8%	156.8	NM	17x						AL-HAJTEX	134.0	130.0	10.0	78	10.18
AIBL1STIMF	4.7	-6.0%	6.0	NM	0.5x						ORIONINFU	400.0	387.4	4.0	18	7.26
RAHIMTEXT	197.1	-5.3%	27.7	NM	7.8x						PTL	47.7	47.0	4.0	150	7.13
PLFSL	1.9	-5.0%	0.3	NM	NM						SUNLIFEINS	57.7	57.7	1.0	122	7.05
IFILISLMF1	4.3	-4.4%	3.8	NM	0.7x						SIMTEX	18.2	18.0	3.0	301	5.46
HAKKANIPUL	78.7	-4.4%	91.5	NM	3.2x						FINEFOODS	263.0	263.0	1.0	20	5.26
BENGALWTL	19.8	-4.3%	15.6	35.4x	0.8x						DHAKABANK	12.5	12.5	2.0	400	5.00
EXIM1STMF	4.6	-4.2%	14.9	NM	0.5x						CITYGENINS	54.8	51.0	5.0	83	4.37
SIBL	7.0	-4.1%	2.3	NM	0.5x						LOVELLO	92.3	92.3	1.0	47	4.34

* 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
TILIL	56.0	55.5	12.6	227	3
AL-HAJTEX	134.0	130.0	10.2	78	10
ORIONINFU	400.0	387.4	7.3	18	4
PTL	47.7	47.0	7.1	150	4
SUNLIFEINS	57.7	57.7	7.0	122	1
SIMTEX	18.2	18.0	5.5	301	3
FINEFOODS	263.0	263.0	5.3	20	1
DHAKABANK	12.5	12.5	5.0	400	2
CITYGENINS	54.8	51.0	4.4	83	5
LOVELLO	92.3	92.3	4.3	47	1
RELIANCE1	16.8	15.3	4.1	250	4
MALEKSPIN	31.0	31.0	3.1	100	1
NCCBANK	13.1	11.1	1.7	146	2
PEOPLESINS	33.7	33.7	1.7	50	2
SONALIANSH	204.0	204.0	1.6	8	1
SALVOCHEM	26.8	26.8	1.5	55	1
APEXSPINN	151.0	151.0	1.4	9	1
JHRML	54.0	54.0	1.3	24	1
POPULARLIF	47.3	47.3	1.3	27	2
AMANFEED	24.1	24.1	1.2	49	1
HAKKANIPUL	84.0	84.0	1.1	13	1
SPCL	41.6	41.6	1.1	26	1
Total			96.1		61

Important DSE News

GIB

(Q1 Un-audited): EPS was Tk. (7.51) for January-March 2025 as against Tk. 0.81 for January-March 2024; NOCFPS was Tk. (10.03) for January-March 2025 as against Tk. (8.60) for January-March 2024. NAV per share was Tk. (29.27) as on March 31, 2025 and Tk. 14.74 as on March 31, 2024. Net Asset Value Per Share decreased by Taka 44.01 for the period ended 31 March 2025 compared to the same period of last year due to earlier charged significant amount of provision and also during the period Taka 607.10 crore, as such retained earnings resulted negative Taka 4,079.93 crore. EPS is negative Taka 7.51 due to operating loss Taka 127.65 crore and provision charged during the year Taka 607.10 crore. NOCFPS decreased by Taka 1.43 for the period ended 31 March 2025 compared to the same period of last year due to decreased in investment income receipt in cash Taka 255.37 crore and increased in profit paid on deposits Taka 218.34 crore for the period ended 31 March 2025 compared to the same period of last year.

(Q2 Un-audited): EPS was Tk. (9.06) for April-June 2025 as against Tk. 0.16 for April-June 2024; EPS was Tk. (16.56) for January-June 2025 as against Tk. 0.97 for January-June 2024. NOCFPS was Tk. (9.08) for January-June 2025 as against Tk. 1.30 for January-June 2024. NAV per share was Tk. (38.33) as on June 30, 2025 and Tk. 14.40 as on June 30, 2024. Net Asset Value Per Share decreased by Taka 52.73 for the period ended 30 June 2025 compared to the same period of last year due to earlier charged significant amount of provision and also during the period Taka 1,070.43 crore, as such retained earnings resulted negative Taka 4,974.23 crore. EPS is negative Taka 16.56 due to operating loss Taka 563.10 crore and provision charged during the year Taka 1,070.43 crore. NOCFPS decreased by Taka 10.38 for the period ended 30 June, 2025 compared to the same period of last year due to decreased in investment income receipt in cash Taka 861.34 crore and increased in profit paid on deposits Taka 314.23 crore for the period ended 30 June 2025 compared to the same period of last year.

MPETROLEUM

The Company has informed that Mrs. Farhana Akter, Deputy General Manager (A & F) has joined as the Company Secretary (Additional Charge) of the company.

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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