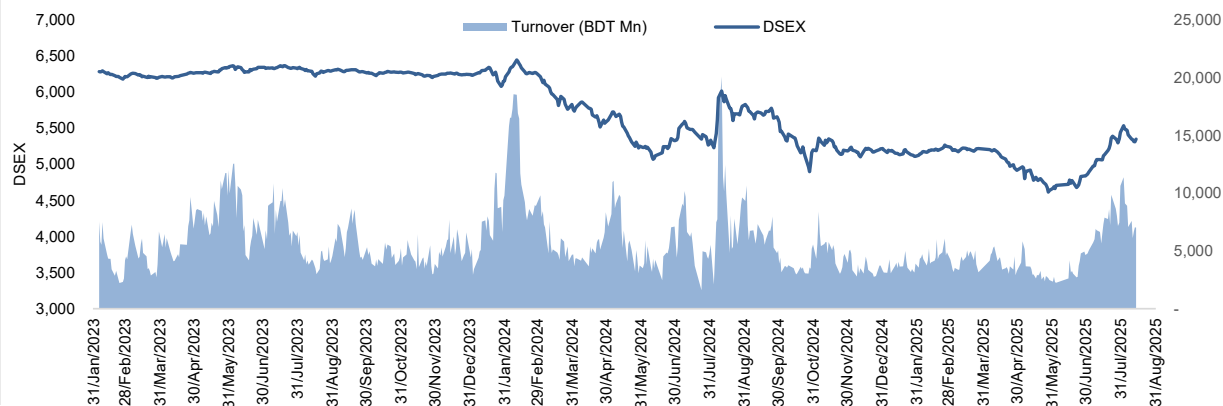


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.68%) gained 35.92 points and closed at 5,350.25. The blue-chip index DS30 (+0.81%), the Shariah-based index DSES (+0.64%), and the large-cap index CDESET (+0.56%) closed at 2,073.82, 1,163.17, and 1,099.72 points, respectively. Most of the large-cap sectors posted positive performance today. NBFI booked the highest gain of 3.44% followed by Bank (+0.96%), Pharmaceutical (+0.80%), Food & Allied (+0.53%), Fuel & Power (+0.52%), Engineering (+0.50%), and Telecommunication (-2.18%), respectively. Block trades contributed 2.1% of the overall market turnover. Orion Infusion Ltd. (+2.4%) was the most traded share with a turnover of BDT 378 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,350.25	5,314.33	+35.92	+0.68%	+2.6%
DS30	2,073.82	2,057.16	+16.66	+0.81%	+6.9%
DSES	1,163.17	1,155.82	+7.35	+0.64%	-0.5%
CDESET	1,099.72	1,093.55	+6.17	+0.56%	+3.2%

	Advanced	Declined	Unchanged	Total
All Category	168	154	77	399
A Category (Equity)	104	91	25	220
B Category (Equity)	37	29	17	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	27	34	35	96
Mutual Funds	4	18	14	36
Corporate Bonds	2	0	0	2
Treasury Bonds	0	3	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,116,830	7,104,087	+0.2%
	Mn USD	58,585	58,480	
Turnover	Mn BDT	7,030	7,049	-0.3%
	Mn USD	58	58	
Volume	Mn Shares	207	215	-3.4%
No. of Trade		205,904	212,926	-3.3%

* Average Interbank Exchange Rate is BDT 121.48 as of Aug 14, 2025

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Figure: Sectorial Turnover (BDT Mn)

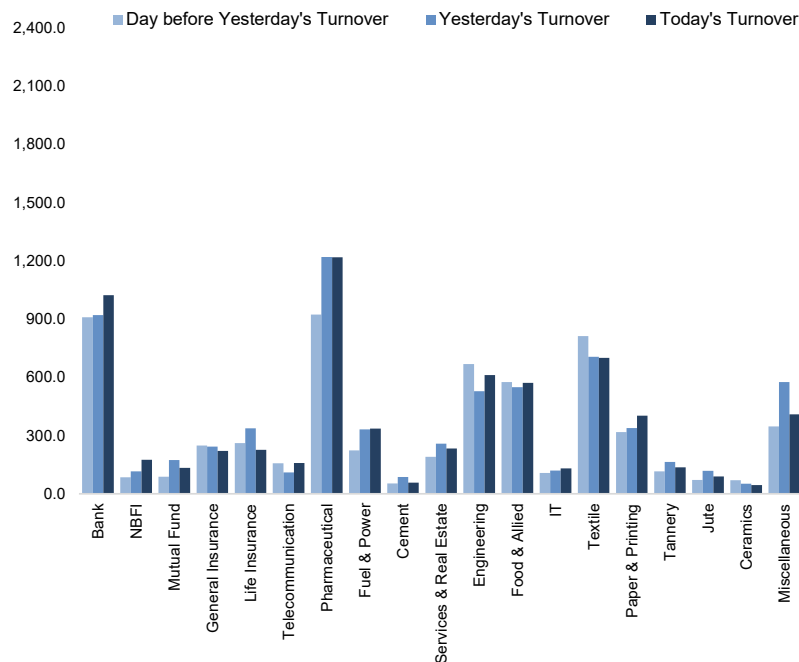
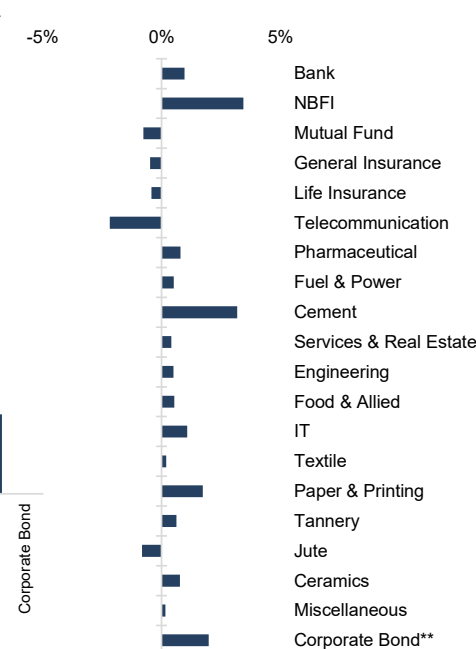


Figure: Sectorial Mcap Change



Market PE 15.2x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK, GIB 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	1,530	1,516	+14.61	+0.96%	36	724,141	10.2%	1,022.3	14.9%	NM	0.8x	GP	411,571	11.4%	66.7	14.0x	7.2x
NBFI	1,102	1,065	+36.62	+3.44%	23	104,987	1.5%	175.6	2.6%	NM	NM	SQURPHARMA	199,363	5.5%	66.6	8.5x	1.5x
Mutual Fund	577	581	-4.45	-0.77%	37	27,640	0.4%	133.8	1.9%	NM	0.5x	BATBC	158,004	4.4%	41.9	12.7x	2.9x
General Insurance	2,662	2,675	-12.94	-0.48%	43	75,979	1.1%	221.2	3.2%	12.8x	1.1x	ROBI	141,948	3.9%	43.2	16.3x	2.2x
Life Insurance	1,834	1,841	-7.86	-0.43%	15	48,767	0.7%	226.8	3.3%	NM	NM	BRACBANK	136,777	3.8%	96.4	9.7x	1.6x
Telecommunication	4,961	5,071	-110.38	-2.18%	3	581,687	8.2%	159.1	2.3%	14.7x	4.2x	WALTONHIL	136,227	3.8%	6.2	10.6x	1.2x
Pharmaceutical	3,098	3,073	+24.65	+0.80%	34	587,316	8.2%	1,217.4	17.7%	13.5x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,155	1,149	+5.93	+0.52%	23	306,062	4.3%	335.7	4.9%	19.3x	0.7x	MARICO	91,265	2.5%	16.1	14.9x	27.4x
Cement	2,074	2,010	+63.99	+3.18%	7	98,840	1.4%	58.1	0.8%	22.8x	2.2x	UPGDCL	79,534	2.2%	5.2	6.8x	1.9x
Services & Real Estate	988	984	+4.03	+0.41%	9	54,331	0.8%	232.8	3.4%	25.0x	0.4x	BERGERPBL	76,306	2.1%	15.1	21.7x	4.4x
Engineering	2,489	2,477	+12.41	+0.50%	42	280,790	3.9%	611.8	8.9%	13.2x	0.9x	LHB	65,734	1.8%	33.1	17.5x	3.5x
Food & Allied	15,044	14,964	+79.64	+0.53%	21	275,260	3.9%	571.4	8.3%	20.8x	4.4x	RENATA	56,694	1.6%	20.9	20.2x	1.6x
IT	1,810	1,791	+19.24	+1.07%	11	23,878	0.3%	131.3	1.9%	20.1x	1.5x	BXPBARMA	51,481	1.4%	74.2	8.0x	1.0x
Textile	1,117	1,115	+2.19	+0.20%	58	116,304	1.6%	700.1	10.2%	NM	0.8x	UNILEVERCL	47,700	1.3%	0.5	75.1x	26.2x
Paper & Printing	4,738	4,657	+80.95	+1.74%	6	21,406	0.3%	401.9	5.8%	NM	1.0x	ICB	45,618	1.3%	69.2	NM	1.1x
Tannery	2,092	2,079	+13.01	+0.63%	6	23,308	0.3%	136.3	2.0%	NM	1.7x	DUTCHBANGL	41,181	1.1%	8.8	11.0x	0.8x
Jute	13,415	13,525	-110.66	-0.82%	3	2,953	0.0%	89.3	1.3%	NM	NM	EBL	40,374	1.1%	10.4	5.8x	0.9x
Ceramics	393	390	+3.01	+0.77%	5	17,647	0.2%	45.3	0.7%	NM	1.1x	PUBALIBANK	37,742	1.0%	24.7	5.1x	0.7x
Miscellaneous	4,174	4,168	+6.78	+0.16%	15	226,678	3.2%	408.8	5.9%	89.8x	1.8x	CITYBANK	35,901	1.0%	347.2	3.3x	0.7x
Corporate Bond**	16,515	16,194	+321.13	+1.98%	16	36,462	0.5%	1.4	0.0%	NM	NM	OLYMPIC	33,250	0.9%	32.0	18.0x	2.8x
Treasury Bond**	2,225	2,221	+4.02	+0.18%	235	3,489,105	49.0%	1.6	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
STANCERAM	97.6	+9.9%	6.3	NM	NM	SQURPHARMA	108,958	7.7%	8.5x	1.5x	ORIONINFU	459.9	+2.4%	378.4	NM	29.3x
HWAWELLTEX	48.0	+9.8%	18.7	13.3x	1.2x	ISLAMIBANK	74,730	5.3%	15.4x	1.0x	CITYBANK	23.6	+2.2%	347.2	3.3x	0.7x
WATACHEM	143.4	+9.7%	22.1	NM	2.3x	BEXIMCO	69,463	4.9%	NM	1.3x	ASIATICLAB	51.7	+6.2%	239.1	21.4x	1.0x
GQBALLPEN	286.4	+8.7%	21.1	NM	2.1x	BATBC	50,233	3.6%	12.7x	2.9x	BSC	118.1	-0.3%	206.7	6.0x	1.2x
PREMIERLEA	2.8	+7.7%	0.2	NM	NM	WALTONHIL	46,773	3.3%	10.6x	1.2x	RAHIMAFOOD	158.4	+3.0%	144.6	NM	17.2x
SOUTHEASTB	9.5	+6.74%	40.1	24.5x	0.4x	BRACBANK	46,489	3.3%	9.7x	1.6x	SEAPEARL	56.0	+0.4%	119.0	NM	3.4x
SUMITPOWER	15.5	+6.2%	50.4	7.1x	0x	GP	44,708	3.2%	14.0x	7.2x	MONOSPOOL	116.4	+5.3%	117.2	31.8x	2.6x
ASIATICLAB	51.7	+6.2%	239.1	21.4x	1.0x	RENATA	32,968	2.3%	20.2x	1.6x	JAMUNABANK	20.6	+3.0%	109.3	7.1x	0.8x
ICB	52.6	+6.0%	69.2	NM	1.1x	BXPBARMA	23,409	1.7%	8.0x	1.0x	DOMINAGE	14.8	+3.5%	102.3	NM	0.9x
KDSALTD	42.3	+6.0%	84.8	19.1x	1.6x	PUBALIBANK	22,905	1.6%	5.1x	0.7x	MAGURAPLEX	97.0	+5.4%	99.9	28.3x	1.3x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.3x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEMLFBSLGF	5.0	-5.7%	2.3	NM	0.5x	LHB	20,953	1.5%	17.5x	3.5x	ORIONINFU	442.5	435.4	12.0	66	28.97
GREENDELMF	3.8	-5.0%	1.8	NM	0x	OLYMPIC	20,496	1.5%	18.0x	2.8x	BRACBANK	68.7	68.7	1.0	400	27.48
VAMLRBBF	5.7	-5.0%	0.6	NM	0.5x	ALARABANK	18,282	1.3%	37.5x	0.8x	ASIATICLAB	53.0	49.1	9.0	293	14.85
ZAHINTEX	4.1	-4.7%	0.5	NM	0.6x	BEACONPHAR	17,838	1.3%	31.0x	4.1x	MARICO	2,750.0	2,750.0	1.0	5	13.75
MAKSONSPIN	6.3	-4.5%	2.4	NM	0.8x	PRIMEBANK	16,142	1.1%	3.8x	0.8x	SIMTEX	17.9	17.6	5.0	450	7.97
MBL1STMF	4.3	-4.4%	0.7	NM	0.5x	ROBI	14,876	1.1%	16.3x	2.2x	CITYGENINS	53.0	51.9	5.0	116	6.07
FAMILYTEX	2.2	-4.3%	0.5	NM	0.2x	UTTARABANK	13,699	1.0%	NM	0.8x	SAMATALETH	86.5	86.4	3.0	60	5.19
PRIMELIFE	40.7	-4.0%	4.2	NM	NM	NBL	13,055	0.9%	NM	NM	EXIM1STMF	4.8	4.6	3.0	1,000	4.76
MEGCONMILK	18.0	-3.7%	0.9	NM	NM	BSRMLTD	12,852	0.9%	5.0x	0.5x	CENTRALINS	41.2	41.2	1.0	90	3.71
INDEXAGRO	79.0	-3.5%	24.0	14.1x	0.9x	* 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					SONALILIFE	61.5	61.0	5.0	60	3.65

* 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	442.5	435.4	29.0	66	12
BRACBANK	68.7	68.7	27.5	400	1
ASIATICLAB	53.0	49.1	14.9	293	9
MARICO	2,750.0	2,750.0	13.8	5	1
SIMTEX	17.9	17.6	8.0	450	5
CITYGENINS	53.0	51.9	6.1	116	5
SAMATALETH	86.5	86.4	5.2	60	3
EXIM1STMF	4.8	4.6	4.8	1,000	3
CENTRALINS	41.2	41.2	3.7	90	1
SONALILIFE	61.5	61.0	3.6	60	5
AL-HAJTEX	138.0	138.0	2.8	20	1
DOMINAGE	13.8	13.8	2.8	200	1
MJLBD	107.6	107.6	2.6	24	1
EASTRNLU	2,540.0	2,540.0	2.5	1	1
RELIANCE1	14.9	14.8	2.3	155	2
AIBL1STMF	5.1	5.1	2.1	418	1
KBPPWBIL	132.0	132.0	2.1	16	1
SHEPHERD	18.4	18.4	1.8	96	1
KPPL	17.2	17.2	1.7	100	1
LHB	54.0	54.0	1.4	26	1
MALEKSPIN	30.5	30.5	1.3	41	1
AMANFEED	24.0	24.0	1.2	49	1
Total			148.6		70

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
NATLIFEINS		0.0%	35.0%	Record Date	17-Aug-25
PRAGATILIF		0.0%	15.0%	Record Date	19-Aug-25
MARICO		0.0%	600.0%	Record Date	21-Aug-25
CAPITECGBF		0.0%	3.3%	Record Date	24-Aug-25
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-25
GRAMEENS2		0.0%	7.5%	Record Date	3-Sep-25

Important DSE News
SKTRIMS

(Q2 Un-audited): EPS was Tk. (0.78) for October-December 2024 as against Tk. 0.36 for October-December 2023; EPS was Tk. (1.31) for July-December 2024 as against Tk. 0.87 for July-December 2023. NOCFPS was Tk. (0.73) for July-December 2024 as against Tk. 0.98 for July-December 2023. NAV per share was Tk. 14.05 as on December 31, 2024 and Tk. 15.89 as on December 31, 2023.

FIRSTSBANK

The company has informed that the Board of Directors has appointed Mr. Abu Reza Md. Yeahia as Managing Director (Current Charge) of the company for the period of 03 (three) months with effect from 15 August 2025.

SEMLIBLSF

The Trustee Committee of the Fund has declared No Dividend for the year ended June 30, 2025. The Fund has reported EPU of Tk. 0.14, NAV per unit at market price of Tk. 9.51, NAV per unit at cost price of Tk. 11.47 and NOCFPU of Tk. 0.54 for the year ended June 30, 2025 as against Tk. (0.64), Tk. 9.38, Tk. 10.89 and Tk. 0.35 respectively for the year ended June 30, 2024. Record Date of the Fund: 03.09.2025.

GRAMEENS2

The Trustee Committee of the Fund has approved 7.5% Cash Dividend considering present year realized profit, previous retained earnings and reserves for distribution of profit for the year ended June 30, 2025. Record date: 03.09.2025. The Fund has reported EPU of Tk. 0.81, NAV per unit at market price of Tk. 15.89, NAV per unit at cost of Tk. 10.95 and NOCFPU of Tk. 0.86 for the year ended June 30, 2025 as against Tk. 0.65, Tk. 16.05, Tk. 10.79 and Tk. 0.61 respectively for the year ended June 30, 2024.

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