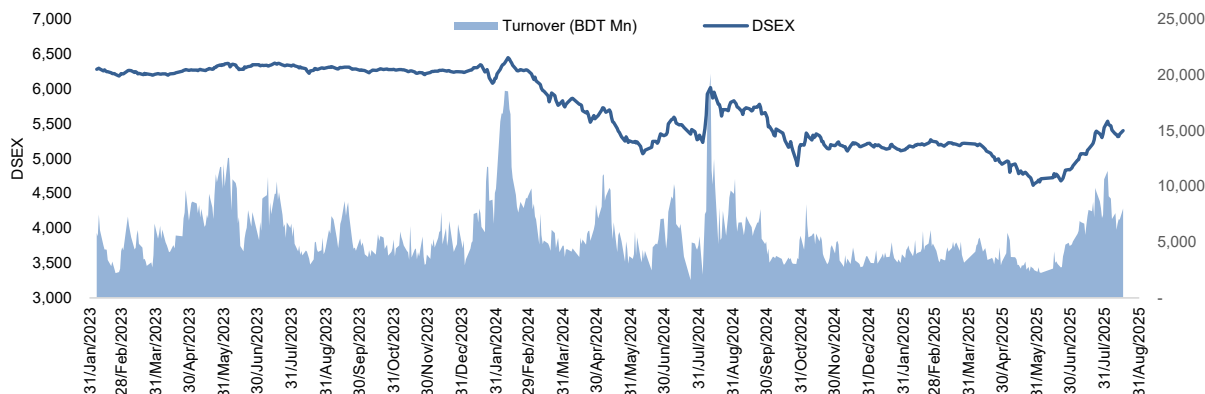


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.96%) gained 51.24 points and closed at 5,401.49. The blue-chip index DS30 (+1.07%), the Shariah-based index DSES (+0.81%), and the large-cap index CDSET (+1.01%) closed at 2,095.95, 1,172.58, and 1,110.82 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 2.01% followed by Fuel & Power (+1.18%), Pharmaceutical (+0.69%), NBFi (+0.47%), Telecommunication (+0.38%), Engineering (+0.21%), and Food & Allied (-0.39%), respectively. Block trades contributed 2.0% of the overall market turnover. The City Bank Ltd. (+5.9%) was the most traded share with a turnover of BDT 364 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,401.49	5,350.25	+51.24	+0.96%	+3.5%
DS30	2,095.95	2,073.82	+22.13	+1.07%	+8.1%
DSES	1,172.58	1,163.17	+9.41	+0.81%	+0.3%
CDSET	1,110.82	1,099.72	+11.10	+1.01%	+4.2%

	Advanced	Declined	Unchanged	Total
All Category	205	135	58	398
A Category (Equity)	122	78	20	220
B Category (Equity)	52	23	8	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	31	34	30	95
Mutual Funds	8	17	11	36
Corporate Bonds	2	1	0	3
Treasury Bonds	1	2	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,150,436	7,116,830	+0.5%
	Mn USD	58,864	58,587	
Turnover	Mn BDT	8,017	7,030	+14.0%
	Mn USD	66	58	
Volume	Mn Shares	251	207	+21.3%
No. of Trade		221,135	205,904	+7.4%

* Average Interbank Exchange Rate is BDT 121.47 as of Aug 17, 2025

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Md Rakibul Hasan
Research Associate

(880) 1708805229

rakibul.hasan@bracepl.com

Figure: Sectorial Turnover (BDT Mn)

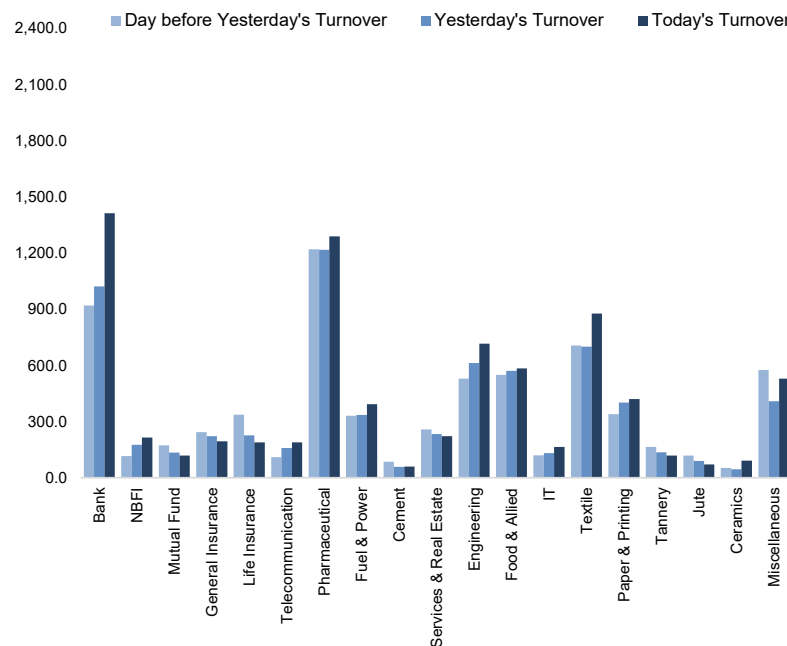
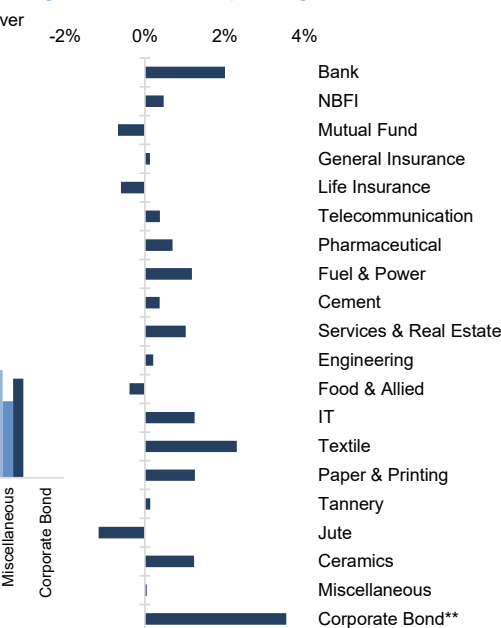


Figure: Sectorial Mcap Change



Market PE 15.4x

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	1,561	1,530	+30.73	+2.01%	36	738,680	10.3%	1,412.3	18.0%	NM	0.8x	GP	410,221	11.2%	48.4	13.9x	7.2x
NBFI	1,107	1,102	+5.22	+0.47%	23	105,484	1.5%	214.2	2.7%	NM	NM	SQURPHARMA	199,806	5.5%	68.0	8.5x	1.5x
Mutual Fund	573	577	-3.87	-0.67%	37	27,454	0.4%	118.8	1.5%	NM	0.5x	BATBC	156,654	4.3%	44.3	12.6x	2.9x
General Insurance	2,666	2,662	+3.36	+0.13%	43	76,075	1.1%	194.1	2.5%	12.8x	1.1x	ROBI	145,615	4.0%	93.7	16.7x	2.3x
Life Insurance	1,823	1,834	-10.98	-0.60%	15	48,475	0.7%	188.6	2.4%	NM	NM	BRACBANK	137,374	3.8%	65.2	9.7x	1.6x
Telecommunication	4,979	4,961	+18.64	+0.38%	3	583,873	8.2%	189.2	2.4%	14.8x	4.2x	WALTONHIL	135,772	3.7%	6.8	10.5x	1.2x
Pharmaceutical	3,119	3,098	+21.38	+0.69%	34	591,369	8.3%	1,289.1	16.4%	13.6x	1.6x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,169	1,155	+13.61	+1.18%	23	309,667	4.3%	392.7	5.0%	19.6x	0.7x	MARICO	91,511	2.5%	6.9	14.9x	27.4x
Cement	2,082	2,074	+7.63	+0.37%	7	99,203	1.4%	58.9	0.7%	22.9x	2.2x	UPGDCL	80,230	2.2%	5.1	6.9x	1.9x
Services & Real Estate	998	988	+10.10	+1.02%	9	54,887	0.8%	221.9	2.8%	25.2x	0.4x	BERGERPBL	76,443	2.1%	8.6	21.8x	4.4x
Engineering	2,494	2,489	+5.11	+0.21%	42	281,367	3.9%	715.5	9.1%	13.3x	0.9x	LHB	66,198	1.8%	25.7	17.6x	3.5x
Food & Allied	14,985	15,044	-58.27	-0.39%	21	274,194	3.8%	584.3	7.4%	20.8x	4.3x	RENATA	56,889	1.6%	36.7	20.2x	1.6x
IT	1,833	1,810	+22.53	+1.24%	11	24,175	0.3%	164.7	2.1%	20.3x	1.5x	BXPHARMA	53,578	1.5%	225.9	8.4x	1.1x
Textile	1,142	1,117	+25.72	+2.30%	58	118,982	1.7%	876.0	11.2%	NM	0.8x	UNILEVERCL	48,076	1.3%	0.9	75.7x	26.4x
Paper & Printing	4,797	4,738	+59.19	+1.25%	6	21,674	0.3%	420.1	5.3%	NM	1.0x	ICB	45,705	1.3%	35.3	NM	1.1x
Tannery	2,095	2,092	+2.83	+0.14%	6	23,340	0.3%	118.7	1.5%	NM	1.7x	DUTCHBANGL	41,761	1.1%	7.8	11.1x	0.8x
Jute	13,259	13,415	-155.45	-1.16%	3	2,919	0.0%	70.5	0.9%	NM	NM	EBL	40,853	1.1%	13.2	5.8x	0.9x
Ceramics	398	393	+4.84	+1.23%	5	17,864	0.2%	91.5	1.2%	NM	1.2x	PUBALIBANK	39,564	1.1%	73.8	5.4x	0.7x
Miscellaneous	4,176	4,174	+2.03	+0.05%	15	226,788	3.2%	528.7	6.7%	89.8x	1.8x	CITYBANK	38,031	1.0%	363.9	3.5x	0.7x
Corporate Bond**	17,101	16,515	+585.52	+3.55%	16	37,754	0.5%	2.3	0.0%	NM	NM	OLYMPIC	33,070	0.9%	78.2	17.9x	2.7x
Treasury Bond**	2,230	2,225	+5.34	+0.24%	235	3,492,944	48.8%	1.4	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					
DSHGARME	126.6	+10.0%	25.3	NM	6.9x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	CITYBANK	25.0	+5.9%	363.9	3.5x	0.7x					
DULAMIACOT	106.2	+9.9%	14.5	NM	NM	ISLAMIBANK	74,730	5.3%	15.8x	1.0x	BSC	118.5	+0.3%	274.1	6.0x	1.2x					
HWAWELLTEX	52.5	+9.4%	17.8	14.5x	1.3x	BEXIMCO	69,463	4.9%	NM	1.3x	ORIONINFU	480.4	+4.5%	267.9	NM	30.6x					
MITHUNKNIT	19.4	+9.0%	4.9	NM	6.1x	BATBC	50,233	3.6%	12.6x	2.9x	BXPHARMA	120.1	+4.1%	225.9	8.4x	1.1x					
GQBALLPEN	311.4	+8.7%	47.0	NM	2.3x	WALTONHIL	46,773	3.3%	10.5x	1.2x	ASIATICLAB	52.2	+1.0%	185.3	21.6x	1.0x					
AZIZPIPES	57.8	+8.24%	4.8	NM	NM	BRACBANK	46,489	3.3%	9.7x	1.6x	MALEKSPIN	31.1	+4.7%	184.0	4.2x	0.5x					
KPPL	18.3	+7.6%	15.1	NM	NM	GP	44,708	3.2%	13.9x	7.2x	JAMUNABANK	21.4	+3.9%	168.4	7.4x	0.9x					
YPL	17.9	+7.2%	12.6	NM	3.3x	RENATA	32,968	2.3%	20.2x	1.6x	MAGURAPLEX	99.5	+2.6%	130.2	29.0x	1.3x					
ACMEPL	16.0	+6.7%	68.1	NM	1.0x	BXPHARMA	23,409	1.7%	8.4x	1.1x	DOMINAGE	15.2	+2.7%	123.4	NM	0.9x					
SQUARETEXT	55.8	+6.5%	24.3	8.3x	1.0x	PUBALIBANK	22,905	1.6%	5.4x	0.7x	CVOPRL	160.3	+5.5%	117.5	59.8x	13.5x					
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.5x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
FAREASTFIN	2.9	-6.5%	0.6	NM	NM	LHB	20,953	1.5%	17.6x	3.5x	FINEFOODS	265.0	255.0	3.0	120	31.60					
IFIC1STMF	3.5	-5.4%	2.4	NM	0x	OLYMPIC	20,496	1.5%	17.9x	2.7x	PUBALIBANK	29.0	29.0	2.0	1,000	29.00					
LEGACYFOOT	68.3	-3.5%	66.1	NM	6.2x	ALARABANK	18,282	1.3%	38.8x	0.8x	SQURPHARMA	231.0	231.0	1.0	100	23.10					
GIB	2.8	-3.4%	1.1	NM	NM	BEACONPHAR	17,838	1.3%	31.4x	4.2x	ASIATICLAB	53.0	51.5	2.0	378	19.66					
SAFKOSPINN	14.0	-3.4%	3.3	NM	NM	PRIMEBANK	16,142	1.1%	3.9x	0.8x	RELANCE1	17.5	14.8	4.0	492	8.40					
UTTARAFIN	14.6	-3.3%	0.6	NM	0.2x	ROBI	14,876	1.1%	16.7x	2.3x	AL-HAJTEX	150.0	135.0	6.0	50	7.03					
ARAMIT	217.3	-3.0%	9.0	56.4x	1.7x	UTTARABANK	13,699	1.0%	NM	0.8x	CITYGENINS	58.2	52.0	3.0	111	6.19					
1JANATAMF	3.3	-2.9%	2.9	NM	0.4x	NBL	13,055	0.9%	NM	NM	TILIL	59.0	59.0	1.0	74	4.37					
REGENTTEX	3.3	-2.9%	0.3	NM	0.1x	BSRMLTD	12,852	0.9%	5.0x	0.5x	JAMUNABANK	21.0	21.0	2.0	200	4.20					
EBLNRBMF	3.4	-2.9%	0.3	NM	0.4x	* 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										MEGHNALIFE	63.5	58.6	3.0	60	3.75

* 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
FINEFOODS	265.0	255.0	31.6	120	3
PUBALIBANK	29.0	29.0	29.0	1,000	2
SQURPHARMA	231.0	231.0	23.1	100	1
ASIATICLAB	53.0	51.5	19.7	378	2
RELIANCE1	17.5	14.8	8.4	492	4
AL-HAJTEX	150.0	135.0	7.0	50	6
CITYGENINS	58.2	52.0	6.2	111	3
TILIL	59.0	59.0	4.4	74	1
JAMUNABANK	21.0	21.0	4.2	200	2
MEGHNALIFE	63.5	58.6	3.8	60	3
APEXSPINN	155.1	155.1	3.1	20	1
BXPHERMA	120.0	120.0	2.3	19	1
ENVOYTEX	43.0	43.0	2.2	50	1
STANDBANKL	7.3	7.3	2.0	280	1
ORIONINFU	430.0	422.0	1.8	4	2
CITYBANK	24.1	24.1	1.8	74	1
IPDC	17.0	17.0	1.7	100	1
AMANFEED	24.0	24.0	1.2	48	1
SPCERAMICS	20.7	20.7	1.0	50	1
KBPPWBIL	115.0	115.0	1.0	9	1
CLICL	48.0	48.0	0.9	20	1
CVOPRL	151.0	151.0	0.9	6	1
Total			163.4		50

Important DSE News

PREMIERLEA

(Q1 Un-audited): Consolidated EPS was Tk. (1.77) for January-March 2025 as against Tk. (2.36) for January-March 2024. Consolidated NOCFPS was Tk. 0.85 for January-March 2025 as against Tk. 1.23 for January-March 2024. Consolidated NAV per share was Tk. (76.05) as on March 31, 2025 and Tk. (49.16) as on March 31, 2024.

(Q2 Un-audited): Consolidated EPS was Tk. (2.44) for April-June 2025 as against Tk. (3.21) for April-June 2024; Consolidated EPS was Tk. (4.20) for January-June 2025 as against Tk. (5.56) for January-June 2024. Consolidated NOCFPS was Tk. 2.01 for January-June 2025 as against Tk. 2.39 for January-June 2024. Consolidated NAV per share was Tk. (78.53) as on June 30, 2025 and Tk. (52.40) as on June 30, 2024.

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 25.09.2025, Time: 11:00 AM, Venue: Through Hybrid System in combination of physical presence of shareholders at MuktijoddhaSmriti Milonayton, Institution of Diploma Engineers, Bangladesh, IDEB Bhaban, 160/A, Kakrail VIP Road, Dhaka-1000 and presence or connection of shareholders through digital platform. Record Date: 04.09.2025. The Company has also reported Consolidated EPS of Tk. (27.50), Consolidated NAV per share of Tk. (74.36) and Consolidated NOCFPS of Tk. 22.92 for the year ended December 31, 2024 as against Tk. (28.55), Tk. (46.79) and Tk. 26.41 respectively for the year ended December 31, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
RELIANCE1		0.0%	0.0%	Record Date	4-Sep-25
SEMLLECMF		0.0%	0.0%	Record Date	4-Sep-25
SEMLFBSLGF		0.0%	0.0%	Record Date	4-Sep-25
PREMIERLEA		0.0%	0.0%	Record Date	4-Sep-25

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