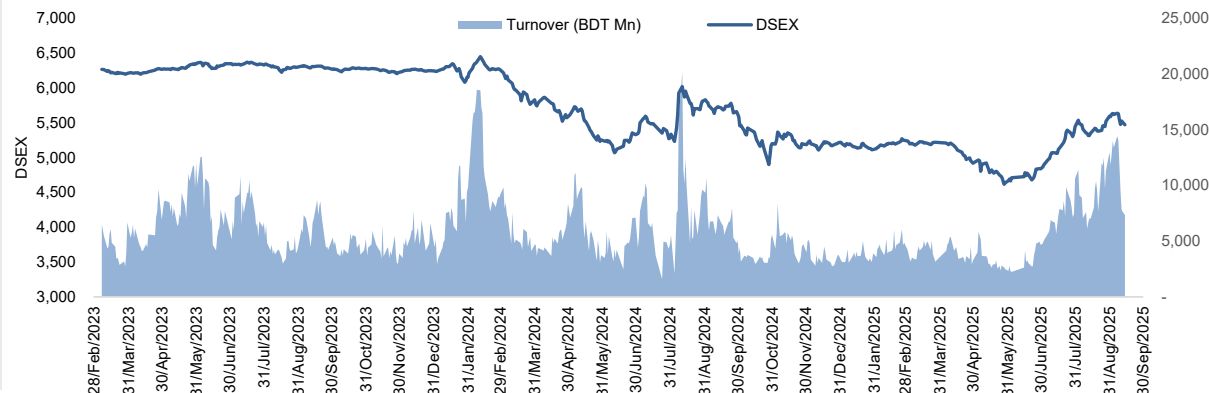


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.00%) lost 55.43 points and closed at 5,468.35. The blue-chip index DS30 (-1.02%), the Shariah-based index DSES (-0.91%), and the large-cap index CDSET (-0.68%) closed at 2,129.05, 1,185.40, and 1,108.52 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.37% followed by Bank (-1.26%), Telecommunication (-1.19%), Fuel & Power (-1.14%), Engineering (-0.59%), Food & Allied (-0.53%), and Pharmaceutical (-0.11%), respectively. Block trades contributed 1.3% of the overall market turnover. Robi Axiata PLC (-2.5%) was the most traded share with a turnover of BDT 249 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,468.35	5,523.78	-55.43	-1.00%	+4.8%
DS30	2,129.05	2,151.08	-22.04	-1.02%	+9.8%
DSES	1,185.40	1,196.31	-10.91	-0.91%	+1.4%
CDSET	1,108.52	1,116.13	-7.61	-0.68%	+4.0%

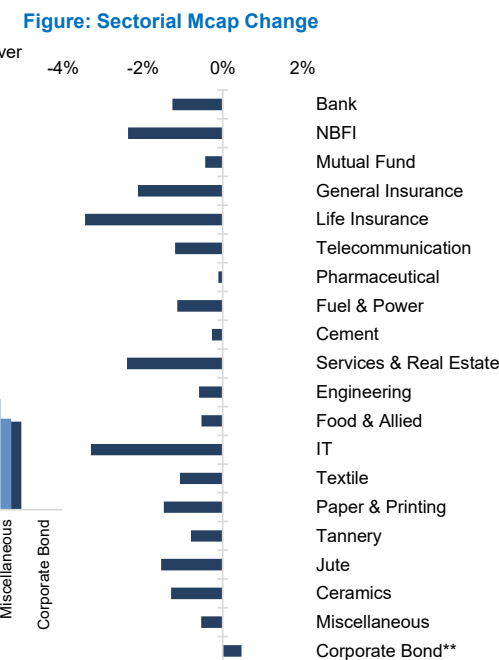
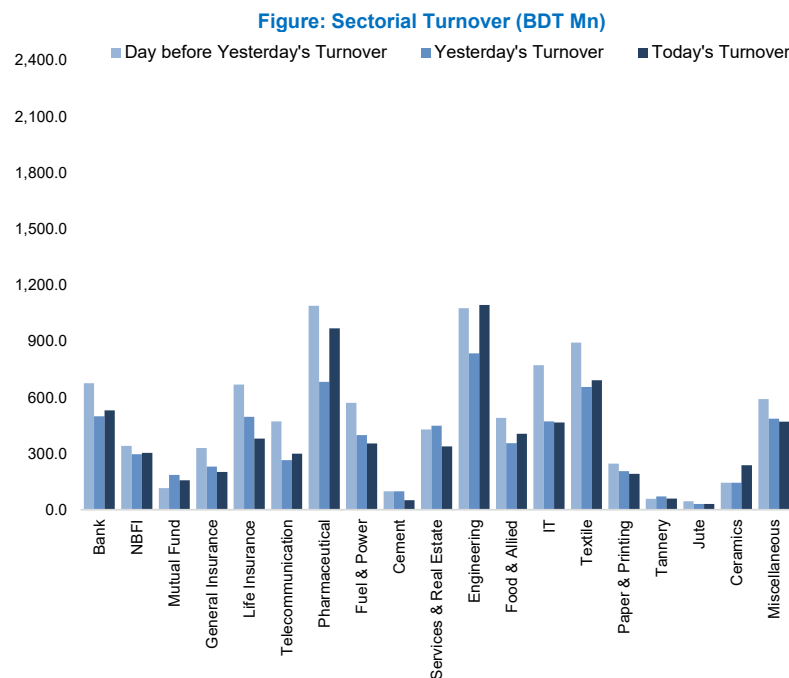
	Advanced	Declined	Unchanged	Total
All Category	67	275	56	398
A Category (Equity)	35	158	27	220
B Category (Equity)	13	62	7	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	19	55	22	96
Mutual Funds	7	11	17	35
Corporate Bonds	3	1	1	5
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,222,998	7,246,126	-0.3%
	Mn USD	59,326	59,516	
Turnover	Mn BDT	7,326	7,783	-5.9%
	Mn USD	60	64	
Volume	Mn Shares	250	234	+6.8%
No. of Trade		218,294	208,401	+4.7%

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 14, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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Market PE 16.5x

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	1,498	1,517	-19.15	-1.26%	36	708,727	9.8%	531.2	7.3%	NM	0.8x	GP	404,955	11.0%	11.7	13.8x	7.1x
NBFI	1,143	1,170	-27.74	-2.37%	23	108,876	1.5%	303.5	4.2%	NM	NM	SQURPHARMA	195,906	5.3%	35.4	8.3x	1.5x
Mutual Fund	574	576	-2.54	-0.44%	37	27,492	0.4%	157.5	2.2%	NM	0.5x	ROBI	160,281	4.4%	248.9	18.4x	2.5x
General Insurance	2,897	2,960	-62.78	-2.12%	43	82,691	1.1%	202.2	2.8%	13.9x	1.2x	BATBC	154,116	4.2%	31.5	12.4x	2.9x
Life Insurance	2,102	2,177	-75.02	-3.45%	15	55,915	0.8%	380.0	5.3%	NM	NM	BRACBANK	142,351	3.9%	51.8	10.1x	1.7x
Telecommunication	5,046	5,107	-60.97	-1.19%	3	591,664	8.2%	299.7	4.1%	15.0x	4.3x	WALTONHIL	138,166	3.8%	37.3	13.3x	1.1x
Pharmaceutical	3,152	3,155	-3.41	-0.11%	34	597,521	8.3%	968.6	13.4%	13.7x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,176	1,189	-13.56	-1.14%	23	311,467	4.3%	354.6	4.9%	19.7x	0.7x	MARICO	91,262	2.5%	1.5	14.9x	27.4x
Cement	2,036	2,042	-5.44	-0.27%	7	97,037	1.3%	51.3	0.7%	22.4x	2.1x	UPGDCL	82,085	2.2%	4.6	7.0x	2.0x
Services & Real Estate	1,104	1,131	-27.16	-2.40%	9	60,721	0.8%	337.7	4.7%	26.8x	0.5x	BERGERPBL	71,086	1.9%	7.4	20.2x	4.1x
Engineering	2,583	2,599	-15.40	-0.59%	42	291,416	4.0%	1,093.2	15.1%	15.6x	0.9x	LHB	62,714	1.7%	18.5	16.7x	3.3x
Food & Allied	14,879	14,959	-79.92	-0.53%	21	272,241	3.8%	405.4	5.6%	20.6x	4.3x	RENATA	56,970	1.5%	21.9	20.2x	1.6x
IT	2,086	2,157	-71.22	-3.30%	11	27,510	0.4%	465.4	6.4%	23.1x	1.7x	BXPHARMA	54,827	1.5%	42.7	8.6x	1.1x
Textile	1,217	1,230	-13.20	-1.07%	58	126,738	1.8%	690.9	9.6%	NM	0.8x	UNILEVERCL	47,261	1.3%	0.0	74.4x	25.9x
Paper & Printing	5,421	5,502	-81.33	-1.48%	6	24,491	0.3%	191.3	2.6%	NM	1.2x	ICB	47,179	1.3%	17.3	NM	1.1x
Tannery	2,111	2,128	-16.90	-0.79%	6	23,521	0.3%	58.9	0.8%	NM	1.8x	EBL	40,374	1.1%	11.5	5.8x	0.9x
Jute	13,775	13,991	-215.99	-1.54%	3	3,032	0.0%	31.5	0.4%	NM	NM	DUTCHBANGL	40,021	1.1%	3.3	10.7x	0.8x
Ceramics	439	445	-5.74	-1.29%	5	19,686	0.3%	236.9	3.3%	NM	1.3x	CITYBANK	39,552	1.1%	137.8	3.6x	0.7x
Miscellaneous	4,170	4,192	-22.67	-0.54%	15	226,435	3.1%	470.1	6.5%	89.7x	1.8x	PUBALIBANK	38,132	1.0%	5.8	5.2x	0.7x
Corporate Bond**	16,525	16,447	+77.68	+0.47%	16	36,482	0.5%	0.4	0.0%	NM	NM	PRIMEBANK	32,613	0.9%	25.2	3.9x	0.8x
Treasury Bond**	2,280	2,271	+8.85	+0.39%	235	3,511,289	48.7%	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
SALAMCRST	23.8	+9.7%	96.9	NM	1.3x	SQURPHARMA	108,958	7.7%	8.3x	1.5x	ROBI	30.6	-2.5%	248.9	18.4x	2.5x
DESHBANDHU	24.0	+9.6%	115.6	NM	1.5x	ISLAMIBANK	74,730	5.3%	NM	0.9x	ACMEPL	18.6	+8.1%	237.7	NM	1.1x
ACMEPL	18.6	+8.1%	237.7	NM	1.1x	BEXIMCO	69,463	4.9%	NM	1.3x	KBPWPBIL	151.2	-1.2%	226.6	NM	12.6x
HAMI	122.6	+7.9%	34.8	NM	13.5x	BATBC	50,233	3.6%	12.4x	2.9x	DOMINAGE	19.1	-9.0%	226.3	NM	1.1x
SHYAMPSUG	187.8	+7.4%	9.6	NM	NM	WALTONHIL	46,773	3.3%	13.3x	1.1x	SAPORTL	34.7	+2.1%	161.2	12.9x	1.0x
AOL	16.9	+5.62%	17.6	32.5x	0.9x	BRACBANK	46,489	3.3%	10.1x	1.7x	SPCERAMICS	22.0	+2.8%	145.9	NM	0.7x
ASIATICLAB	58.8	+5.2%	114.2	24.3x	1x	GP	44,708	3.2%	13.8x	7.1x	IPDC	22.6	-3.0%	143.9	22.7x	1.3x
USMANIAGL	38.1	+5.0%	2.9	NM	0.6x	RENATA	32,968	2.3%	20.2x	1.6x	CITYBANK	26.0	-2.3%	137.8	3.6x	0.7x
TALLUSPIN	6.7	+4.7%	4.9	NM	0.5x	BXPHARMA	23,409	1.7%	8.6x	1.1x	BEACONPHAR	131.7	+4.0%	125.2	35.5x	4.7x
TAMIJTEX	163.2	+4.6%	45.0	24.1x	1.6x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	LOVELLO	103.7	+1.2%	121.4	46.7x	8.2x
						CITYBANK	21,020	1.5%	3.6x	0.7x						
						LHB	20,953	1.5%	16.7x	3.3x						
						OLYMPIC	20,496	1.5%	17.3x	2.7x						
						ALARABANK	18,282	1.3%	36.9x	0.8x						
						BEACONPHAR	17,838	1.3%	35.5x	4.7x						
						PRIMEBANK	16,142	1.1%	3.9x	0.8x						
						ROBI	14,876	1.1%	18.4x	2.5x						
						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											
SIBL	4.9	-9.3%	5.4	NM	0.4x											
DOMINAGE	19.1	-9.0%	226.3	NM	1x											
MONNOFABR	20.9	-8.7%	97.7	NM	0.8x											
GIB	2.1	-8.7%	7.5	NM	NM											
ISNLTD	105.2	-8.4%	114.0	NM	38.3x											
BBSCABLES	21.0	-7.5%	35.1	NM	0.7x											
INTECH	36.7	-7.3%	79.0	NM	NM											
RUPALILIFE	113.0	-6.7%	106.1	NM	NM											
FASFIN	1.4	-6.7%	0.6	NM	NM											
FAREASTFIN	1.4	-6.7%	1.8	NM	NM											

* 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
MARICO	2,900.0	2,900.0	23.5	8	1
ROBI	31.9	31.5	21.4	679	2
PTL	58.5	58.5	11.7	200	1
LHB	55.0	55.0	10.2	185	1
CITYBANK	27.3	27.3	4.1	150	1
RELIANCE1	14.8	14.8	3.7	250	5
ISNLTD	123.0	123.0	2.1	17	1
ACMEPL	17.8	17.3	2.0	114	4
SALAMCRST	21.5	19.6	1.9	92	2
ITC	47.5	47.5	1.7	36	1
AFTABAUTO	38.4	38.2	1.5	40	2
SAIHAMCOT	20.1	18.4	1.4	73	2
GENNEXT	3.0	3.0	1.2	400	1
MONNOFABR	24.0	24.0	1.1	47	1
AL-HAJTEX	165.2	163.5	1.0	6	2
HAKKANIPUL	80.0	80.0	1.0	12	1
EMERALDOIL	20.4	20.4	0.9	42	1
FINEFOODS	288.4	288.4	0.7	2	1
BDTHAI	13.6	13.6	0.7	50	1
RAHIMAFOOD	153.0	153.0	0.7	4	1
EXIM1STMF	4.2	4.2	0.6	136	1
ASIATICLAB	55.3	55.3	0.6	10	1
Total			95.1		37

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PREMIERBAN		0.0%	0.0%	Record Date	17-Sep-25
ISLAMIBANK		0.0%	0.0%	Record Date	23-Sep-25
WALTONHIL		10.0%	175.0%	Record Date	28-Sep-25
EHL		0.0%	25.0%	Record Date	5-Oct-25
GSPFINANCE		0.0%	0.0%	Record Date	14-Oct-25
RUPALILIFE		0.0%	10.0%	Record Date	3-Nov-25

Important DSE News
CITYBANK

In reference to the PSI circulated on 9th February, 2025 (disseminated by DSE on 10th February, 2025), the Board of Directors in their 676th Meeting, among others, decided to issue Subordinated Debt (Bond) worth taka 800.00 (Eight Hundred) Crore of Purchase Value. Accordingly, by circular resolution dated 11th September 2025, the Board of Directors consented to the updated features and approved the issuance of Subordinated Debt (Bond) worth taka 1,200.00 (Twelve Hundred) Crore of Face Value to meet capital requirements under Basel-III and to support the bank's continued business growth, subject to approval from the Bangladesh Securities and Exchange Commission, Bangladesh Bank, and other relevant regulatory authorities.

ADNTEL

ADN Telecom Limited has signed MoUs with South Korea's prominent company PBS Co. Ltd and CND Motors Co. Ltd. to collaborate in sustainable infrastructure, renewable energy, and smart mobility solutions in Bangladesh. The agreements encompass three major projects aimed at supporting Bangladesh's technological advancement and sustainable growth: Assembly & Supply of Electric three-wheeler, Intelligent Traffic Management & AI-based Traffic Signal Solutions, Solar Streetlight Installation Project. The Korean counterpart will contribute cutting-edge technology, equipment, and technical expertise. ADN shall facilitate project implementation and market development.

NHFIL

Shaw Wallace Bangladesh Ltd., a Corporate Sponsor of the company, has expressed its intention to sell 800,000 shares out of its total holding of 25,88,910 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within next 30 working days.

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