

Daily Market Review

Market closed flat

1-Sep-2025

DSEX WENT DOWN BY 10.6 POINTS

Market closed flat today with decrease in turnover.

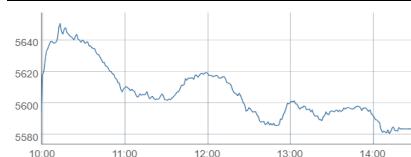
Broad index DSEX went down by 10.6 points.

Jute, L. Insurance and Services & Real Estate are the top three sectors that closed positive today while Travel & Leisure, Ceramics and Textile are the top three sectors that closed negative today.

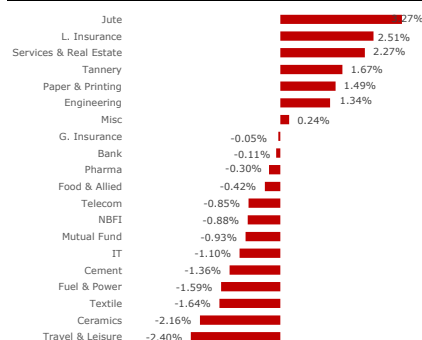
Turnover decreased by 8.9% to BDT 11,811mn (USD 96mn).

Pharma sector dominated the turnover chart covering 14.6% of the total turnover.

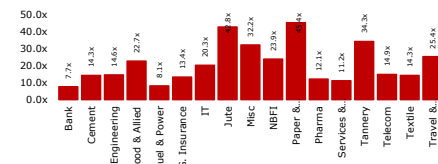
Intraday Performance of DSEX



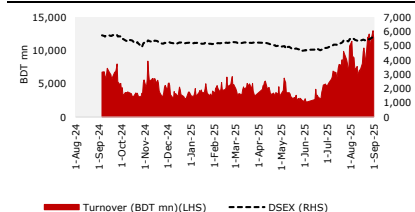
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,583.79	(10.6)	-0.19%	5,216.44	7.04%
DS30	2,188.76	(5.0)	-0.23%	1,939.73	12.84%
DSES	1,225.03	(2.7)	-0.22%	1,168.90	4.80%
S&P 500	6,460.26	(41.6)	-0.64%	5,881.63	9.84%
Nikkei 225	42,188.79	(529.7)	-1.24%	39,894.54	5.75%
FTSE 100	9,219.05	31.7	0.35%	8,132.56	13.36%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	11,811	12,964	-1,153	-8.89%	6,857
Turnover (USD mn)	96	106	-9	-8.89%	57
Volume (mn)	326	404	-78	-19.42%	244
Market Cap (BDT bn)	7,274	7,280	-7	-0.10%	
Market Cap (USD bn)	59	59	0	-0.10%	
Market P/E (x)	12.3				
Particulars	Winner	Loser	Unchanged		
Market Breadth	119	244	35		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	732,691	19.79%	-0.1%	969.0	8.20%
Pharma	604,199	16.32%	-0.3%	1,720.6	14.57%
Telecom	592,552	16.00%	-0.9%	341.5	2.89%
Fuel & Power	315,171	8.51%	-1.6%	532.0	4.50%
Engineering	306,570	8.28%	1.3%	1,010.6	8.56%
Food & Allied	278,910	7.53%	-0.4%	987.3	8.36%
Misc	233,912	6.32%	0.2%	789.7	6.69%
Textile	126,914	3.43%	-1.6%	1,430.9	12.11%
NBFI	103,124	2.79%	-0.9%	187.8	1.59%
Cement	101,248	2.73%	-1.4%	199.9	1.69%
G. Insurance	84,708	2.29%	-0.1%	695.2	5.89%
L. Insurance	57,849	1.56%	2.5%	913.6	7.73%
Travel & Leisure	40,387	1.09%	-2.4%	203.6	1.72%
IT	27,590	0.75%	-1.1%	570.8	4.83%
Mutual Fund	26,579	0.72%	-0.9%	96.0	0.81%
Paper & Printing	26,221	0.71%	1.5%	447.2	3.79%
Tannery	24,185	0.65%	1.7%	192.2	1.63%
Services & Real Estate	19,915	0.54%	2.3%	230.7	1.95%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ORIONINFU	561.20	4.90%	447.44	0.84	300.64
LOVELLO	99.20	-3.97%	288.76	2.85	32.63
KBPWBIL	126.40	5.25%	253.41	2.01	632.00
SINOBANGLA	61.40	5.68%	222.45	3.75	50.60
CITYBANK	25.40	0.00%	195.74	7.72	5.70

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
INTECH	34.10	10.00%	60.49	1.82	n/a
DSHGARM	140.00	9.98%	82.38	0.59	218.75
BANGAS	141.30	9.96%	113.11	0.82	529.88
BAYLEASING	4.80	9.09%	3.35	0.70	n/a
STANCERAM	90.10	8.95%	1.65	0.02	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PRIMEFIN	2.70	-6.90%	4.17	1.53	n/a
EPGL	21.40	-6.14%	68.03	3.11	n/a
PHPMF1	3.10	-6.06%	1.56	0.49	n/a
HAMI	102.00	-5.90%	13.72	0.13	364.29
REGENTTEX	3.30	-5.71%	0.24	0.07	n/a

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CITYBANK

Buy Declaration of a Director

Mr. Hossain Khaled, a Director of the Company, has expressed his intention to buy 2,25,000 shares of the company at prevailing market price in the Public Market within next 30 (thirty) working days.

ISLAMIBANK

Q2 Financials

Consolidated EPS was Tk. 0.24 for April-June 2025 as against Tk. 1.91 for April-June 2024; Consolidated EPS was Tk. 0.42 for January-June 2025 as against Tk. 2.22 for January-June 2024. Consolidated NOCFPS was Tk. 17.68 for January-June 2025 as against Tk. 54.79 for January-June 2024. Consolidated NAV per share was Tk. 44.39 as on June 30, 2025 and Tk. 46.06 as on June 30, 2024.

RUPALILIFE

Dividend Declaration

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 03.11.2025, Time: 10:00 AM, Venue: Through Digital Platform (Link will be notified later on). Record Date: 29.09.2025.

SONALILIFE

Category Change

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., September 01, 2025 as the company has conducted its AGM and approved the proposed 10% cash dividend for the year ended December 31, 2023.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AAMRANET	23.1	23.1	1	122040	2.819
AIL	64.5	64.5	1	11900	0.768
ASIATICLAB	57	56.7	2	24200	1.375
BEACONPHAR	151.8	135	2	11260	1.587
CITYBANK	23	23	2	200000	4.6
CITYGENINS	63	62	2	62000	3.856
CLICL	54.9	51.5	9	759510	40.11
CVOPRL	182	182	1	3000	0.546
DBH1STMF	5.8	5.8	1	140000	0.812
EASTRNLUB	2630	2630	1	700	1.841
ENVOYTEX	56.5	56.5	1	15000	0.848
EXIM1STMF	4.8	4.4	2	381000	1.72
FINEFOODS	287.1	263	2	26000	7.32
IBNSINA	300	300	1	1680	0.504
INTRACO	25.9	25.9	1	35000	0.906
ISNLTD	105	98	2	57352	5.69
JMISMDL	170	170	1	4200	0.714
KBPPWBIL	108.2	108.2	1	4635	0.502
LOVELLO	106.5	93.5	8	167781	16.076
MALEKSPIN	32.5	32.5	1	33000	1.073
MEGHNACEM	53.5	53.5	1	35000	1.873
MONNOCERA	96	96	1	6000	0.576
NATLIFEINS	116.1	116.1	1	27684	3.214
OLYMPIC	175	175	1	8100	1.417
ORIONINFU	534.1	494.9	33	417521	214.122
PEOPLESINS	37.5	37.5	1	20000	0.750
POPULARLIF	51.5	51.5	1	10000	0.515
PRAGATILIF	168	168	1	3000	0.504
PTL	58.5	55	5	435333	24.679
SHEPHERD	19	19	1	80000	1.52
SIMTEX	20.2	20.2	2	170647	3.447
SONALIANSH	235	235	1	3000	0.705
SONALIPAPR	277	277	1	2000	0.554
STANDARINS	47	47	1	32000	1.504
TILIL	85.7	85.7	1	6002	0.514
TOSRIFA	21	21	1	41000	0.861
UNIONINS	37.5	37.5	1	20000	0.75
UTTARABANK	21.2	21.2	1	616862	13.077

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We calculate our target price by weighting DCF, DDM, SOTP, asset-based and other relative valuation methods, and applying appropriate premiums/ discounts and/or other relevant adjustments.

Expected absolute returns are calculated as the % of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

Recommendation Type	Holding period (if not otherwise mentioned)	Absolute Return Potential
Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between -5% and +15%
Underweight	12 Months	Less than -5%

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Head Office

Gulshan

Bulus Center

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Extensions of Head Office

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Bashundhara +880 1718 106 217	Mirpur-1 +880 1713 205 723	Mirpur-12 +880 1911 197 188	Banasree +880 1701 205 075	Uttara +880 1913 128 156

Branch Offices

Chattogram +880 1701 205 038	Sylhet +880 1713 205 760
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Digital Booths

Khulna +880 1717 411 466	Barishal +880 1713 205 762	Cumilla +880 1324 243 163	Jashore +880 1324 243 203	Gazipur +880 1324 243 165
Feni +880 1324 243 210	Khatungonj +880 1713 205 742	Chawkbazar +880 1817 206 965	Madhobdi +880 1324 243 156	
	Narayangonj +880 1324 243 207	Agrabad +880 1324 243 198		