

Daily Market Review

Market closed positive

2-Sep-2025

DSEX WENT UP BY 37.1 POINTS

Market closed positive today with increase in turnover.

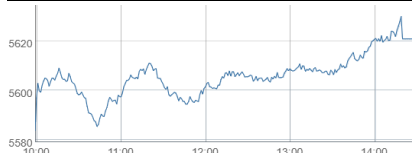
Broad index DSEX went up by 37.1 points.

IT, Ceramics and Travel & Leisure are the top three sectors that closed positive today while Mutual Fund, L. Insurance and Food & Allied are the top three sectors that closed negative today.

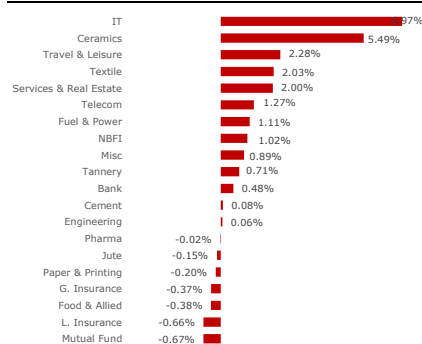
Turnover increased by 8.2% to BDT 12,781mn (USD 104mn).

Pharma sector dominated the turnover chart covering 12.5% of the total turnover.

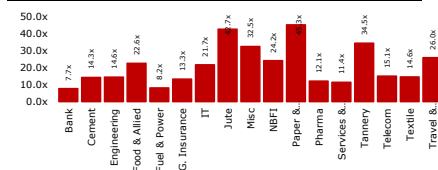
Intraday Performance of DSEX



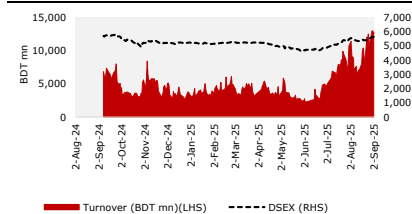
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,620.92	37.1	0.67%	5,216.44	7.75%
DS30	2,195.11	6.3	0.29%	1,939.73	13.17%
DSES	1,233.14	8.1	0.66%	1,168.90	5.50%
S&P 500	6,460.26	(41.6)	-0.64%	5,881.63	9.84%
Nikkei 225	42,310.49	121.7	0.29%	39,894.54	6.06%
FTSE 100	9,159.00	(37.3)	-0.41%	8,132.56	12.62%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	12,781	11,811	969	8.21%	7,025
Turnover (USD mn)	104	96	8	8.21%	59
Volume (mn)	383	326	57	17.62%	248
Market Cap (BDT bn)	7,286	7,274	12	0.17%	
Market Cap (USD bn)	59	59	0	0.17%	
Market P/E (x)	12.3				
Particulars	Gain	Loser	Unchanged		
Market Breadth	220	131	47		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	736,239	19.76%	0.5%	1,400.5	10.96%
Pharma	604,068	16.21%	0.0%	1,602.1	12.54%
Telecom	600,058	16.11%	1.3%	343.7	2.69%
Fuel & Power	318,672	8.55%	1.1%	713.9	5.59%
Engineering	306,751	8.23%	0.1%	1,467.9	11.49%
Food & Allied	277,860	7.46%	-0.4%	1,067.4	8.35%
Misc	236,001	6.33%	0.9%	954.7	7.47%
Textile	129,492	3.48%	2.0%	1,310.9	10.26%
NBFI	104,173	2.80%	1.0%	253.5	1.98%
Cement	101,330	2.72%	0.1%	169.8	1.33%
G. Insurance	84,393	2.27%	-0.4%	416.8	3.26%
L. Insurance	57,464	1.54%	-0.7%	625.2	4.89%
Travel & Leisure	41,310	1.11%	2.3%	147.4	1.15%
IT	29,511	0.79%	7.0%	988.0	7.73%
Mutual Fund	26,402	0.71%	-0.7%	123.5	0.97%
Paper & Printing	26,170	0.70%	-0.2%	447.7	3.50%
Tannery	24,357	0.65%	0.7%	181.9	1.42%
Services & Real Estate	20,313	0.55%	2.0%	257.0	2.01%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
CITYBANK	26.30	3.54%	456.98	17.67	5.90
KBPBWBL	138.60	9.65%	400.61	3.07	693.00
LOVELLO	103.70	4.54%	393.49	3.84	34.11
ORIONINFU	550.20	-1.96%	338.22	0.61	294.75
ITC	47.50	8.45%	218.42	4.71	11.88

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MIRACLEIND	33.00	10.00%	31.17	0.95	n/a
INTECH	37.50	9.97%	28.01	0.75	n/a
INDEXAGRO	86.30	9.94%	64.84	0.77	19.50
NAHEEACP	24.40	9.91%	57.62	2.43	43.57
BDCOM	30.40	9.75%	72.68	2.45	39.31

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
GSPFINANCE	3.10	-8.82%	2.46	0.78	n/a
PRIMEFIN	2.50	-7.41%	1.80	0.71	n/a
RELANCE1	12.90	-6.52%	17.83	1.27	n/a
PHOENIXFIN	3.20	-5.88%	0.69	0.22	n/a
FASFIN	1.70	-5.56%	0.90	0.53	n/a

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KAY&QUE

Retail Sale of LPG at the company's Dakshinpara unit will start today

The company has informed that the retail sale of Liquefied Petroleum Gas (LPG) at the company's Dakshinpara Dhamrail unit will start from today i.e., 02.09.2025. Consequently, the company's revenue is expected to increase.

DHAKABANK

Declaration of share receipt by a Sponsor

Mr. A.T.M. Hayatuzzaman Khan, a Sponsor of the company, has informed that he will receive 517,065 shares of the company from his sister Ms. Zaheda Wahed Khan (a General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from August 31, 2025.

NAVANAPHAR

Decision to repay subscribed amount of Convertible Bond earlier

The company has informed that the Board of Directors of the company in its meeting held on 1st September, 2025 has decided to repay the subscribed amount of Navana Pharmaceuticals Partial Convertible Bond earlier than maturity without any conversion due to the under subscription, subject to the approval from Bangladesh Securities and Exchange commission.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ACMELAB	86	86	1	6500	0.559
BEACONPHAR	149	125	3	38000	5.566
BEXIMCO	99.8	99.8	1	8299	0.828
CAPMBDBLMF	8.8	8.7	2	260000	2.268
CLICL	61.1	58	3	90000	5.372
DBH1STMF	5.8	5.8	1	163000	0.945
DOMINAGE	17.6	17.6	1	45000	0.792
ENVOYTEX	56.3	52	2	28530	1.555
FINEFOODS	288	288	1	20000	5.76
IFIC	6	6	1	400000	2.4
INDEXAGRO	84	81.5	2	20000	1.655
INTECH	37.5	37.5	1	13400	0.502
INTRACO	25.3	25.3	1	100000	2.53
ITC	44	44	1	15000	0.66
KBPPWBIL	126	113.9	12	624759	71.479
LHB	56.9	56.9	1	10000	0.569
LOVELLO	108	89.3	2	106000	9.578
MARICO	2920	2920	2	11000	32.12
MEGHNACEM	55	55	2	50000	2.75
MONNOFABR	18.6	18.6	1	80000	1.488
MONOSPOOL	133	133	1	16500	2.195
NHFIL	25.1	25.1	1	220000	5.522
ONEBANKPLC	8.4	8.4	1	70000	0.588
ORIONINFU	578	519.2	5	16869	9.241
PEOPLESINS	36	36	1	30000	1.08
PREMIERBAN	7.1	7.1	1	250000	1.775
RELIANCE1	15.1	15	7	592700	8.93
SAMATALETH	122.5	122.5	1	13000	1.593
SAPORTL	30	30	1	94000	2.82
SPCERAMICS	21	21	2	150000	3.15
TILIL	77	77	1	12000	0.924
TRUSTBANK	20	20	1	100000	2
WATACHEM	163.8	163.8	1	9000	1.474

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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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Office Premises

Head Office

Gulshan

Bulus Center

+880 2955 8481

Extensions of Head Office

Dilkusha +880 1701 205 090	Dilkusha (NIK Tower) +880 1701 205 000	Dhanmondi +880 1713 205 703	Nikunja +880 1701 205 013	Mohammadpur +880 1324 243 212
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		