

## Daily Market Review

Market closed flat  
3-Sep-2025

### DSEX WENT UP BY 10.7 POINTS

Market closed flat today with increase in turnover.

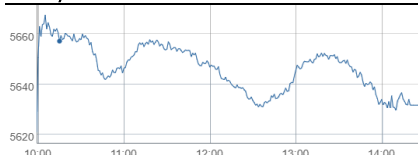
Broad index DSEX went up by 10.7 points.

Ceramics, Mutual Fund and NBF are the top three sectors that closed positive today while Travel & Leisure, Services & Real Estate and Engineering are the top three sectors that closed negative today.

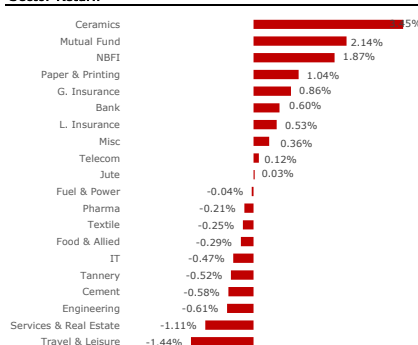
Turnover increased by 9.4% to BDT 13,976mn (USD 114mn).

Bank sector dominated the turnover chart covering 16.4% of the total turnover.

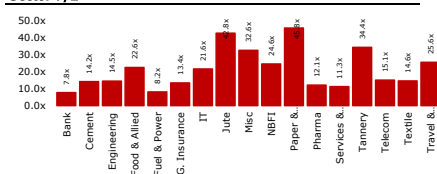
#### Intraday Performance of DSEX



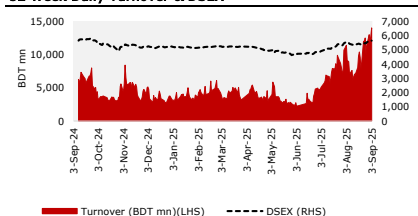
#### Sector Return



#### Sector P/E



#### 52 Week Daily Turnover & DSEX



#### Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,631.62	10.7	0.19%	5,216.44	7.96%
DS30	2,195.83	0.7	0.03%	1,939.73	13.20%
DSES	1,233.68	0.5	0.04%	1,168.90	5.54%
S&P 500	6,415.54	(44.7)	-0.69%	5,881.63	9.08%
Nikkei 225	41,938.89	(371.6)	-0.88%	39,894.54	5.12%
FTSE 100	9,154.52	37.8	0.41%	8,132.56	12.57%

#### Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	13,976	12,781	1,195	9.35%	7,217
Turnover (USD mn)	114	104	10	9.35%	60
Volume (mn)	437	383	54	14.03%	253
Market Cap (BDT bn)	7,297	7,286	12	0.16%	
Market Cap (USD bn)	59	59	0	0.16%	
Market P/E (x)	12.3				
Particulars	Winner	Loser	Unchanged		
Market Breadth	184	165	47		

#### Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	740,655	19.86%	0.6%	2,292.2	16.40%
Pharma	602,802	16.16%	-0.2%	1,755.2	12.56%
Telecom	600,800	16.11%	0.1%	402.5	2.88%
Fuel & Power	318,541	8.54%	0.0%	587.5	4.20%
Engineering	304,882	8.18%	-0.6%	1,242.1	8.89%
Food & Allied	277,045	7.43%	-0.3%	875.9	6.27%
Misc	236,854	6.35%	0.4%	1,048.9	7.51%
Textile	129,171	3.46%	-0.2%	1,382.1	9.89%
NBF	106,118	2.85%	1.9%	338.4	2.42%
Cement	100,745	2.70%	-0.6%	186.4	1.33%
G. Insurance	85,120	2.28%	0.9%	554.1	3.96%
L. Insurance	57,772	1.55%	0.5%	743.1	5.32%
Travel & Leisure	40,714	1.09%	-1.4%	189.5	1.36%
IT	29,374	0.79%	-0.5%	931.2	6.66%
Mutual Fund	26,968	0.72%	2.1%	189.3	1.35%
Paper & Printing	26,441	0.71%	1.0%	411.1	2.94%
Tannery	24,230	0.65%	-0.5%	138.0	0.99%
Ceramics	20,743	0.56%	3.4%	384.1	2.75%

#### Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
CITYBANK	27.40	4.18%	700.86	25.45	6.14
ORIONINFU	556.90	1.22%	546.12	0.98	298.34
KBPPWBIL	139.30	0.51%	422.93	3.12	696.50
EBL	25.50	-0.39%	307.96	12.10	5.80
JAMUNABANK	22.40	3.70%	298.29	13.31	3.38

#### Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
INTECH	41.20	9.87%	229.21	5.69	n/a
ZAHINTEX	6.00	9.09%	3.52	0.59	n/a
NURANI	2.70	8.00%	0.65	0.24	n/a
BDCOM	32.80	7.89%	196.60	6.02	42.41
GOLDENSON	13.20	7.32%	99.72	7.60	n/a

#### Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
HRTEX	30.60	-10.00%	22.56	0.73	n/a
PRIMEFIN	2.30	-8.00%	2.88	1.25	n/a
PLFSL	1.30	-7.14%	2.05	1.57	n/a
BIFC	4.00	-6.98%	0.26	0.06	n/a
FASFIN	1.60	-5.88%	0.08	0.05	n/a

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## RENATA

### Renata PLC launches Fludrocortisone in the UK Market

The company has informed that it has launched Fludrocortisone 0.1 mg tablets in the UK market. The product is indicated for partial replacement therapy in primary adrenocortical insufficiency (Addison's disease) and for the treatment of salt-losing adrenogenital syndrome. Fludrocortisone 0.1 mg tablets are being supplied from the Company's UK MHRA-approved potent product facility and will be commercialized under the livery of Renata (UK) Limited. Notably, Renata's Fludrocortisone offers a significant advantage with its stability at storage conditions below 25 degree Celsius, in contrast to the innovator product requiring refrigeration between 2-8 degree Celsius.

## Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AMANFEED	27.8	27.8	1	105000	2.919
ASIATICLAB	56.9	50	5	797500	40.517
BEACHHATCH	58.6	58.6	1	35000	2.051
BEACONPHAR	125	125	1	4000	0.5
CAPMBDBLMF	9.7	8.4	4	480000	4.136
CITYBANK	26.8	26.8	1	80000	2.144
CLICL	62	60.3	2	20000	1.223
DBH1STMF	6	5.8	4	727000	4.277
EXIM1STMF	4.4	4.2	4	1935000	8.184
GP	310	310	1	162401	50.344
GQBALLPEN	396	365	3	4905	1.897
HAKKANIPUL	86.7	86.5	2	19889	1.722
IBNSINA	352	352	1	1650	0.581
INTRACO	26	26	1	50000	1.3
ISNLTD	103.7	103.7	1	9870	1.024
JMISMDL	161.8	161.8	1	3400	0.55
KBPPWBIL	125	125	8	960300	120.037
LOVELLO	95	94	2	74600	7.062
MALEKSPIN	34.9	34.7	2	30000	1.044
ORIONINFU	523.6	509.9	7	71263	36.807
PTL	58.5	58	3	42367	2.464
PUBALIBANK	29.4	29.4	7	3400000	99.96
RUPALILIFE	97	97	1	6500	0.63
SIMTEX	20.8	20.8	1	25611	0.533
SINOBANGLA	65	61.7	2	124200	7.714
SONALIPAPR	277	277	1	3000	0.831
TILIL	86.1	86.1	1	40000	3.444
YPL	20.5	20.5	1	30000	0.615

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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

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Bulus Center

+880 2955 8481

#### Extensions of Head Office

<b>Dilkusha</b> +880 1701 205 090	<b>Dilkusha (NIK Tower)</b> +880 1701 205 000	<b>Dhanmondi</b> +880 1713 205 703	<b>Nikunja</b> +880 1701 205 013	<b>Mohammadpur</b> +880 1324 243 212
<b>Bashundhara</b> +880 1718 106 217	<b>Mirpur-1</b> +880 1713 205 723	<b>Mirpur-12</b> +880 1911 197 188	<b>Banasree</b> +880 1701 205 075	<b>Uttara</b> +880 1913 128 156

#### Branch Offices

<b>Chattogram</b> +880 1701 205 038	<b>Sylhet</b> +880 1713 205 760
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#### Digital Booths

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