

Daily Market Review

Market closed negative

9-Sep-2025

DSEX WENT DOWN BY 89.3 POINTS

Market closed negative today with decrease in turnover.

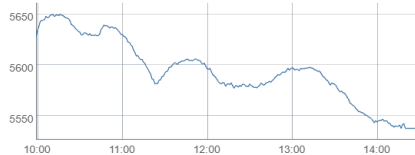
Broad index DSEX went down by 89.3 points.

Only L. Insurance, IT and sectors closed positive today while Ceramics, Travel & Leisure and G. Insurance are the top three sectors that closed negative today.

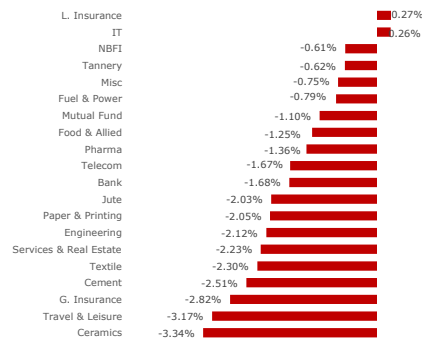
Turnover decreased by 16.0% to BDT 11,773mn (USD 96mn).

Pharma sector dominated the turnover chart covering 12.6% of the total turnover.

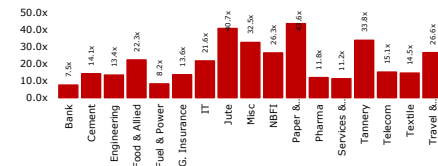
Intraday Performance of DSEX



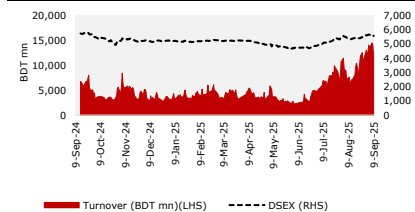
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,538.25	(89.3)	-1.59%	5,216.44	6.17%
DS30	2,152.83	(39.2)	-1.79%	1,939.73	10.99%
DSES	1,203.98	(21.2)	-1.73%	1,168.90	3.00%
S&P 500	6,495.15	13.7	0.21%	5,881.63	10.43%
Nikkei 225	43,459.29	(184.5)	-0.42%	39,894.54	8.94%
FTSE 100	9,233.35	11.9	0.13%	8,132.56	13.54%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	11,773	14,008	-2,236	-15.96%	7,950
Turnover (USD mn)	96	114	-18	-15.96%	66
Volume (mn)	377	475	-98	-20.65%	275
Market Cap (BDT bn)	7,261	7,311	-50	-0.68%	
Market Cap (USD bn)	59	60	0	-0.68%	
Market P/E (x)	12.1				
Particulars	Winner	Loser	Unchanged		
Market Breadth	68	305	28		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	712,627	19.37%	-1.7%	954.2	8.11%
Telecom	599,539	16.29%	-1.7%	502.0	4.26%
Pharma	589,316	16.02%	-1.4%	1,489.1	12.65%
Fuel & Power	317,668	8.63%	-0.8%	774.1	6.58%
Engineering	296,274	8.05%	-2.1%	1,195.1	10.15%
Food & Allied	273,214	7.42%	-1.2%	679.1	5.77%
Misc	236,090	6.42%	-0.7%	679.6	5.77%
Textile	128,210	3.48%	-2.3%	1,194.2	10.14%
NBFI	113,492	3.08%	-0.6%	453.8	3.85%
Cement	100,016	2.72%	-2.5%	132.5	1.13%
G. Insurance	85,953	2.34%	-2.8%	466.2	3.96%
L. Insurance	59,648	1.62%	0.3%	871.6	7.40%
Travel & Leisure	42,247	1.15%	-3.2%	239.5	2.03%
IT	29,385	0.80%	0.3%	1,018.4	8.65%
Mutual Fund	27,376	0.74%	-1.1%	267.2	2.27%
Paper & Printing	25,194	0.68%	-2.1%	295.3	2.51%
Tannery	23,867	0.65%	-0.6%	81.6	0.69%
Ceramics	20,067	0.55%	-3.3%	206.8	1.76%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ORIONINFU	505.70	-7.50%	504.21	0.97	270.91
ROBI	31.70	-2.16%	392.44	12.20	21.71
KBPPWBIL	147.80	-2.57%	282.07	1.90	739.00
CITYBANK	26.10	-2.61%	217.56	8.27	5.85
EGEN	32.20	6.27%	206.33	6.47	41.64

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
TALLUSPIN	6.60	10.00%	10.18	1.55	n/a
ISNLTD	119.20	9.96%	141.26	1.21	n/a
INTECH	44.10	9.70%	153.11	3.52	n/a
CAPMBDBLMF	11.90	9.17%	61.95	5.54	n/a
PLFSL	1.30	8.33%	0.64	0.51	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ORIONINFU	505.70	-7.50%	504.21	0.97	270.91
FIRSTFIN	2.70	-6.90%	0.10	0.04	n/a
ARAMITCEM	12.70	-6.62%	1.09	0.08	n/a
SAFKOSPINN	14.30	-6.54%	7.27	0.50	n/a
NAHEEACP	24.50	-6.49%	38.75	1.54	43.75

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PREMIERBAN

Regarding Dissolution & Formation of the Board of Directors

The company has informed that in exercise of the powers conferred under Sections 47(1)(a) and 48(1) of the Bank Company Act, 1991 (as amended up to 2023), Bangladesh Bank, through Order dated August 19, 2025, has dissolved the existing Board of Directors of The Premier Bank PLC. with immediate effect. Bangladesh Bank, through its letter dated August 19, 2025, has formed the Board of Directors of The Premier Bank PLC. Subsequently, in the 314th meeting of Board of Directors held on August 21, 2025, Dr. Arifur Rahman has been unanimously elected as the Chairman of the Board.

NRBCBANK

Sale declaration of a Sponsor

Mr. Syed Munsif Ali, a Sponsor of the Company, has expressed his intention to sell 30,00,000 shares out of his holding of 1,13,54,645 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 (thirty) working days.

PIONEERINS

Declaration of share transfer by a Director

Mr. Mr. Alamgir Shamsul Alamin, a Director of the company, has expressed his intention to transfer 1,915,000 shares of the company to his brother Mr. Jahangir Alamin (a General Shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days with effect from September 08, 2025.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ACMELAB	87	87	3	94900	8.256
AL-HAJTEX	155	155	1	8000	1.24
BEACHHATCH	61.9	61.9	1	11970	0.741
BEACONPHAR	127	120	2	16170	2.024
CAPMBDBLMF	10.7	9.9	18	2550068	26.606
CITYGENINS	59.8	58.5	2	23721	1.405
CLICL	63	62	2	70000	4.365
EXIM1STMF	4.2	4.2	1	150000	0.63
FINEFOODS	290.2	285	5	45950	13.31
GP	301	301	1	20000	6.02
GQBALLPEN	460.6	460.6	1	1500	0.691
ISNLTD	112.5	108.1	6	67786	7.394
JAMUNABANK	22.2	22.2	1	67500	1.498
KBPPWBIL	137	137	2	48500	6.644
KDSALTD	55	55	1	11000	0.605
LOVELLO	117	96	3	114900	11.133
MALEKSPIN	34.9	34.9	1	18500	0.646
MARICO	2905	2905	4	9841	28.588
ORIONINFU	549.1	505.7	4	5506	2.873
PIONEERINS	52.8	52.8	1	88270	4.661
PRAGATILIF	214	185.4	4	15805	3.191
PRIMEBANK	26.6	26.6	1	2250000	59.85
PTL	61.8	59.6	4	137612	8.272
SALVOCHEM	31.1	31.1	1	17524	0.545
SEAPPEARL	59.9	59.9	1	10000	0.599
SHEPHERD	19.8	19.8	1	47000	0.931
SIMTEX	21.4	20.5	5	226070	4.779
SONALILIFE	85.8	85.8	2	111000	9.524
SPCL	56.9	56.9	1	10000	0.569
SUNLIFEINS	64	64	1	132000	8.448
TILIL	76	76	1	8000	0.608
WALTONHIL	470	470	1	6900	3.243

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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

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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		