

Daily Market Review

Market closed flat
21-Aug-2025

DSEX WENT DOWN BY 4.4 POINTS

Market closed flat today with decrease in turnover.

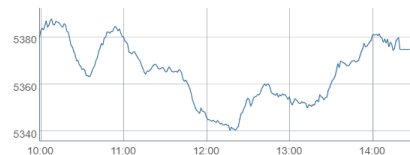
Broad index DSEX went down by 4.4 points.

Paper & Printing, Jute and Services & Real Estate are the top three sectors that closed positive today while G. Insurance, Misc and Telecom are the top three sectors that closed negative today.

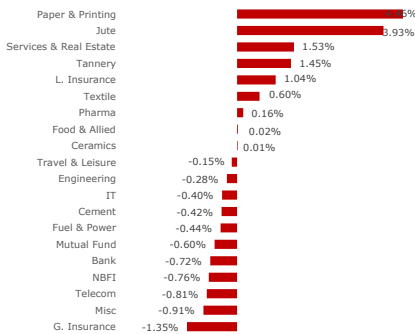
Turnover decreased by 19.6% to BDT 7,668mn (USD 62mn).

Pharma sector dominated the turnover chart covering 16.9% of the total turnover.

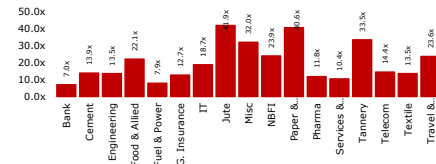
Intraday Performance of DSEX



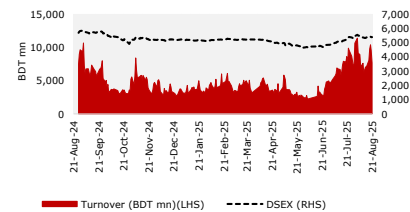
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,374.96	(4.4)	-0.08%	5,216.44	3.04%
DS30	2,089.44	3.2	0.15%	1,939.73	7.72%
DSES	1,180.34	2.7	0.23%	1,168.90	0.98%
S&P 500	6,395.78	(15.6)	-0.24%	5,881.63	8.74%
Nikkei 225	42,610.17	(278.4)	-0.65%	39,894.54	6.81%
FTSE 100	9,277.02	(11.1)	-0.12%	8,132.56	14.07%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	7,668	9,538	-1,870	-19.61%	5,813
Turnover (USD mn)	62	78	-15	-19.61%	48
Volume (mn)	224	288	-64	-22.14%	218
Market Cap (BDT bn)	7,082	7,098	-16	-0.23%	
Market Cap (USD bn)	58	58	0	-0.23%	
Market P/E (x)	11.6				
Particulars	Winner	Loser	Unchanged		
Market Breadth	117	208	72		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	707,796	19.83%	-0.7%	654.1	8.53%
Pharma	587,862	16.47%	0.2%	1,294.1	16.88%
Telecom	573,247	16.06%	-0.8%	99.8	1.30%
Fuel & Power	306,989	8.60%	-0.4%	321.9	4.20%
Engineering	285,422	8.00%	-0.3%	617.9	8.06%
Food & Allied	271,040	7.59%	0.0%	701.9	9.15%
Misc	232,009	6.50%	-0.9%	530.7	6.92%
Textile	119,558	3.35%	0.6%	871.2	11.36%
NBFI	103,012	2.89%	-0.8%	113.8	1.48%
Cement	98,181	2.75%	-0.4%	61.1	0.80%
G. Insurance	80,222	2.25%	-1.3%	598.8	7.81%
L. Insurance	50,159	1.41%	1.0%	296.9	3.87%
Travel & Leisure	37,532	1.05%	-0.1%	122.4	1.60%
Mutual Fund	26,667	0.75%	-0.6%	87.6	1.14%
IT	25,418	0.71%	-0.4%	397.3	5.18%
Tannery	23,626	0.66%	1.4%	128.0	1.67%
Paper & Printing	23,438	0.66%	4.5%	467.6	6.10%
Services & Real Estate	18,544	0.52%	1.5%	131.7	1.72%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BSC	121.80	0.58%	307.53	2.56	6.35
BEACHHATCH	55.40	3.75%	236.89	4.39	9.07
ORIONINFU	524.40	3.05%	227.46	0.44	280.93
ISNLTD	72.60	10.00%	221.41	3.07	n/a
SONALIPAPR	229.40	8.72%	190.20	0.85	26.35

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ISNLTD	72.60	10.00%	221.41	3.07	n/a
SAMATALETH	104.20	9.92%	42.57	0.43	2,084.00
SALVOCHEM	30.00	9.89%	85.11	3.00	51.72
LEGACYFOOT	74.20	9.28%	63.18	0.88	n/a
KAY&QUE	352.10	8.74%	91.69	0.27	71.57

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FIRSTSBANK	3.30	-5.71%	7.25	2.17	n/a
VAMLRBBF	5.50	-5.17%	0.59	0.11	n/a
CENTRALINS	39.80	-5.01%	12.49	0.31	21.63
PRIMEFIN	3.80	-5.00%	0.48	0.12	n/a
PROVATIINS	33.00	-4.35%	10.95	0.33	21.15

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NCCBANK

Buy Declaration of a Sponsor

Mrs. Sohela Hossain, a Sponsor of the Company, has expressed her intention to buy 20,00,000 shares of the company at prevailing market price in the Public and/or Block Market through Dhaka Stock Exchange PLC. within next 30 (thirty) working days.

GIB

Approval of No Dividend for the year 2023 in the 11th AGM of the company

Refer to their earlier news disseminated by DSE on 13.07.2025 the company has informed that the honorable Shareholders in the 11th Annual General Meeting (AGM) held on August 19, 2025 have considered and approved among others the Agenda No. 02 under Ordinary Business. Revocation of the total 10% Dividend: The honorable Shareholders in the 11th AGM 'REVOKED' the total dividend of 10% in combination of 5% cash and 5% stock dividend as recommended earlier by the Board of Directors of the Bank for the year ended December 31, 2023; Approval of No Dividend: The honorable Shareholders in 11th AGM also approved 'NO DIVIDEND' as recommended by the Board of Directors of the Bank in its 107th meeting held on July 08, 2025 for the year ended December 31, 2023.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AL-HAJTEX	146.1	143	4	40012	5.753
AMANFEED	25.7	25.7	1	50000	1.285
CITYGENINS	58	58	1	20000	1.16
CLICL	50.5	50.5	1	75000	3.788
CVOPRL	164	164	1	3850	0.631
EASTRNLUB	2650	2650	1	1000	2.65
EBL	27.6	27.6	1	100000	2.76
EIL	37.5	36.5	4	115000	4.254
EXIM1STMF	4.6	4.6	3	409486	1.884
FINEFOODS	250	250	1	5000	1.25
GQBALLPEN	320	320	1	1600	0.512
HAMI	104.9	104.9	1	27190	2.852
ICB	52.9	52.9	1	10000	0.529
IFIC	6.3	6.3	1	100000	0.63
ISNLTD	70	60	2	40000	2.5
MJLBD	100.7	100.7	5	54619	5.5
MONNOFABR	16.7	16.7	1	300000	5.01
MONOSPOOL	116	116	1	5650	0.655
ORIONINFU	507	492.1	2	2750	1.377
ORIONPHARM	35.1	35.1	2	99990	3.51
PENINSULA	11.2	11.2	1	45000	0.504
PRAGATILIF	145.5	141	4	29680	4.224
PUBALIBANK	30.5	30.5	2	75200	2.294
RAKCERAMIC	21.5	21.5	1	48838	1.05
RELIANCE1	15.1	15.1	3	120346	1.817
SALVOCHEM	29.9	28.3	3	102000	3.016
SAMATALETH	92	92	1	13300	1.224
SEAPEARL	53.5	53.5	2	671000	35.898
SILCOPHL	16.7	16.7	1	30000	0.501
SONALIANSH	224	224	1	5000	1.12
SQURPHARMA	230	222.8	3	15421	3.483
STANDBANKL	7.4	7.4	4	3140186	23.237

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EQUITY RECOMMENDATION STRUCTURE (ABSOLUTE RATINGS)

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

+880 2955 8481

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		