

DSEX WENT UP BY 14.2 POINTS

Market closed flat today with increase in turnover.

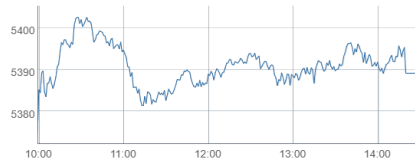
Broad index DSEX went up by 14.2 points.

Paper & Printing, L. Insurance and Textile are the top three sectors that closed positive today while Mutual Fund, Ceramics and Bank are the top three sectors that closed negative today.

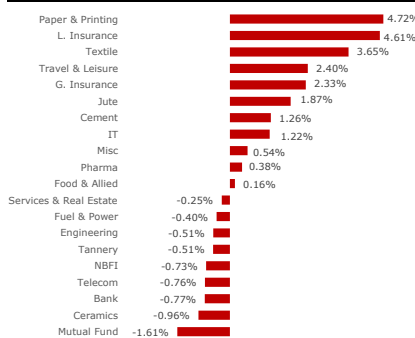
Turnover increased by 56.5% to BDT 12,003mn (USD 98mn).

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

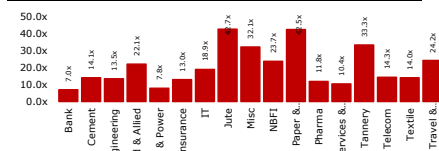
Intraday Performance of DSEX



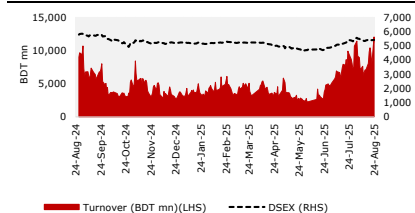
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,389.17	14.2	0.26%	5,216.44	3.31%
DS30	2,101.60	12.2	0.58%	1,939.73	8.34%
DSES	1,179.53	(0.8)	-0.07%	1,168.90	0.91%
S&P 500	6,466.91	96.7	1.52%	5,881.63	9.95%
Nikkei 225	42,633.29	23.1	0.05%	39,894.54	6.86%
FTSE 100	9,321.40	12.2	0.13%	8,132.56	14.62%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	12,003	7,668	4,335	56.53%	5,964
Turnover (USD mn)	98	62	35	56.53%	50
Volume (mn)	373	224	149	66.41%	222
Market Cap (BDT bn)	7,095	7,082	13	0.18%	
Market Cap (USD bn)	58	58	0	0.18%	
Market P/E (x)	11.6				
Particulars	Gain	Loser	Unchanged		
Market Breadth	184	190	26		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	702,343	19.66%	-0.8%	926.6	7.72%
Pharma	590,068	16.52%	0.4%	1,713.6	14.28%
Telecom	568,875	15.93%	-0.8%	177.9	1.48%
Fuel & Power	305,747	8.56%	-0.4%	428.7	3.57%
Engineering	283,976	7.95%	-0.5%	965.9	8.05%
Food & Allied	271,465	7.60%	0.2%	1,013.1	8.44%
Misc	233,267	6.53%	0.5%	662.1	5.52%
Textile	123,917	3.47%	3.6%	1,969.6	16.41%
NBFI	102,261	2.86%	-0.7%	190.7	1.59%
Cement	99,420	2.78%	1.3%	90.7	0.76%
G. Insurance	82,095	2.30%	2.3%	1,056.7	8.80%
L. Insurance	52,470	1.47%	4.6%	658.3	5.48%
Travel & Leisure	38,431	1.08%	2.4%	331.8	2.76%
Mutual Fund	26,237	0.73%	-1.6%	109.8	0.91%
IT	25,729	0.72%	1.2%	508.7	4.24%
Paper & Printing	24,544	0.69%	4.7%	595.9	4.96%
Tannery	23,505	0.66%	-0.5%	166.4	1.39%
Services & Real Estate	18,498	0.52%	-0.2%	171.4	1.43%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MALEKSPIN	33.50	9.84%	378.82	11.66	4.35
BXPHERMA	132.70	3.67%	347.48	2.61	8.43
BSC	123.90	1.72%	311.64	2.52	6.46
BEACHHATCH	56.80	2.53%	288.93	5.04	9.30
SEAPPEARL	60.40	5.78%	272.00	4.58	n/a

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
AIL	58.50	9.96%	260.53	4.53	19.41
ISNLTD	79.80	9.92%	99.75	1.30	n/a
PTL	52.10	9.92%	78.37	1.55	7.49
CRYSTALINS	56.60	9.90%	126.89	2.28	15.90
MALEKSPIN	33.50	9.84%	378.82	11.66	4.35

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SIBL	5.50	-9.84%	4.26	0.77	n/a
UNIONCAP	3.70	-9.76%	4.44	1.19	n/a
APOLISPAT	2.80	-9.68%	3.70	1.29	n/a
BAYLEASING	3.80	-9.52%	2.94	0.77	n/a
EMERALDOIL	19.00	-9.52%	19.34	0.99	5.69

JHRML

Regarding Inauguration of JMI Specialized Hospital Limited

The company has informed that the grand opening of JMI Specialized Hospital Limited, a licensed facility of Apollo Health and Lifestyle Limited, India (Apollo Clinic), and a 65% owned distinguished subsidiary of JMI Hospital Requisite Manufacturing Limited, one of the flagship companies of the JMI Group. This landmark event, inaugurated on 23 August 2025, marks a significant step forward of the company's enduring commitment to delivering internationally accredited healthcare services and enhancing the overall healthcare ecosystem of Bangladesh.

AIL

Board approval to relocate/extension of the existing factory premises

The company has informed that the Board of Directors of Alif Industries Ltd., in its meeting held on August 21, 2025, has approved the decision to relocate/extension of the existing factory premises of the Company. The relocation/extension has been authorized to Mr. Md. Azimul Islam, Managing Director of Alif Industries Ltd., with a view to ensuring enhanced compliance and to meet the increasing demand of international buyers. The company has also informed that this decision is expected to strengthen the Company's operational capacity and align its production facilities with the requirements of its valued buyers.

MAGURAPLEX

BSEC declined raising paid up capital by issuing shares to 3 sponsors

The company has informed that as per Regulation 9 (i) of DSE/CSE Listing Regulations, 2015, to maintain paid up capital of Tk. 30.00 crore of Magura Multiplex PLC., an application was submitted to BSEC on 21-07-2025 to raise paid up capital from Tk. 296,033,780/- to Tk. 300,000,000/- by issuing shares for the shortfall amount of Tk. 3,966,220/- to 3 Sponsors of the company. Bangladesh Securities and Exchange Commission (BSEC) observed that the offer was not made to the existing shareholders, Extra-ordinary General Meeting was not convened for consent of the general shareholders, PSI was not disseminated to issue new shares, proposed price of the shares was at face value which is below the prevailing market price and for containing emphasis-of-matter points in the audited financial statements, thus the proposal has been declined by the BSEC.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AIL	54	54	1	9300	0.502
AL-HAJTEX	151	143	4	68002	9.844
AMANFEED	25.3	25.3	1	45000	1.139
APEXFOODS	256	256	1	12871	3.295
APEXSPINN	160	160	1	8000	1.28
ASIATICLAB	57.1	53.1	3	122000	6.863
BANKASIA	19.6	19.6	1	45000	0.882
BEXGSUKUK	58	58	1	30000	1.74
BSCPLC	152.9	152.9	1	5000	0.764
BXPHERMA	134	130	6	35530	4.724
CITYBANK	21.5	21.5	1	100000	2.15
DHAKAINS	41.5	41.5	1	230000	9.545
FINEFOODS	245	245	1	2100	0.514
HAMI	105	105	1	8000	0.84
ICB	50.1	50.1	1	10000	0.501
IFIC	6.1	6.1	1	200000	1.22
INTRACO	25	23.4	2	156000	3.74
ISNLTD	74.2	71.5	5	117790	8.616
JAMUNABANK	21.4	21.4	1	63000	1.348
KAY&QUE	352	352	1	5500	1.936
LANKABAFIN	18	18	1	52000	0.936
LHB	58.2	58.2	1	300000	17.46
LOVELLO	87.5	87	2	43001	3.755
MALEKSPIN	31.5	31.5	1	30000	0.945
NHFIL	25	25	2	147300	3.683
ORIONINFU	501.2	501	3	4158	2.084
PRAGATILF	162.8	155	4	38000	5.95
PROVATIINS	32.1	32.1	1	87999	2.825
PTL	50	50	2	40501	2.025
RDFOOD	27.2	27.2	1	41000	1.115
SAIHAMCOT	17.4	17.4	1	100000	1.74
SALVOCHEM	27	27	1	50001	1.35
SAMATALETH	107.5	96.4	3	36300	3.56
SEAPEARL	55	51.4	7	518000	28.073
SEMLLECMF	7.1	7	2	300000	2.11
SHAHJABANK	18.5	18.5	1	1235000	22.848
SONALIANSH	234	234	1	7000	1.638
SPCL	43.3	43.3	1	100000	4.33
STANDBANKL	7.3	7.3	1	102500	0.748
TILIL	62	62	1	8100	0.502

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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

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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		