

Daily Market Review

Market closed positive
28-Aug-2025

DSEX WENT UP BY 74.6 POINTS

Market closed positive today with increase in turnover.

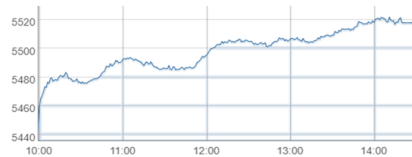
Broad index DSEX went up by 74.6 points.

Travel & Leisure, IT and NBFI are the top three sectors that closed positive today while only Jute, G. Insurance and Tannery sectors closed negative today.

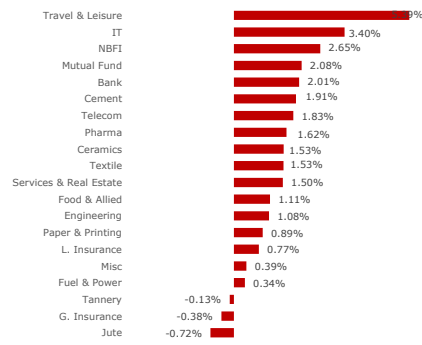
Turnover increased by 16.6% to BDT 11,323mn (USD 92mn).

Pharma sector dominated the turnover chart covering 15.4% of the total turnover.

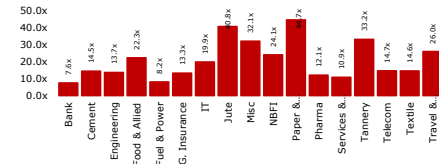
Intraday Performance of DSEX



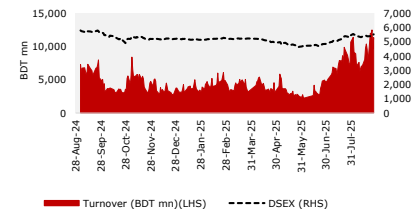
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,517.95	74.6	1.37%	5,216.44	5.78%
DS30	2,156.99	40.8	1.93%	1,939.73	11.20%
DS5	1,207.20	18.5	1.55%	1,168.90	3.28%
S&P 500	6,481.40	15.5	0.24%	5,881.63	10.20%
Nikkei 225	42,828.79	308.5	0.73%	39,894.54	7.36%
FTSE 100	9,223.78	(31.7)	-0.34%	8,132.56	13.42%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	11,323	9,715	1,608	16.55%	6,536
Turnover (USD mn)	92	79	13	16.55%	55
Volume (mn)	376	311	65	21.04%	237
Market Cap (BDT bn)	7,184	7,130	54	0.75%	
Market Cap (USD bn)	58	58	0	0.75%	
Market P/E (x)	12.1				
Particulars	Winner	Loser	Unchanged		
Market Breadth	281	86	31		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	719,862	19.66%	2.0%	1,129.0	9.97%
Pharma	603,066	16.47%	1.6%	1,738.4	15.35%
Telecom	585,098	15.98%	1.8%	173.3	1.53%
Fuel & Power	318,483	8.70%	0.3%	741.4	6.55%
Engineering	289,631	7.91%	1.1%	1,240.2	10.95%
Food & Allied	273,986	7.48%	1.1%	768.2	6.78%
Misc	233,281	6.37%	0.4%	560.3	4.95%
Textile	129,116	3.53%	1.5%	1,591.1	14.05%
NBFI	103,941	2.84%	2.7%	206.7	1.83%
Cement	102,337	2.79%	1.9%	145.7	1.29%
G. Insurance	84,485	2.31%	-0.4%	489.4	4.32%
L. Insurance	55,269	1.51%	0.8%	526.0	4.65%
Travel & Leisure	41,366	1.13%	5.4%	243.0	2.15%
Mutual Fund	27,015	0.74%	2.1%	172.9	1.53%
IT	26,980	0.74%	3.4%	623.1	5.50%
Paper & Printing	25,799	0.70%	0.9%	448.0	3.96%
Tannery	23,452	0.64%	-0.1%	118.6	1.05%
Services & Real Estate	19,408	0.53%	1.5%	194.5	1.72%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
RENATA	516.10	8.74%	226.51	0.46	24.27
BRACBANK	71.40	3.33%	224.54	3.16	10.03
CITYBANK	25.30	2.02%	221.11	8.78	5.67
SONALIPAPR	280.70	4.35%	210.86	0.75	32.24
QUASEMIND	45.80	6.51%	183.07	4.02	60.26

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
UNIONCAP	4.40	10.00%	2.11	0.49	n/a
ISNLTD	105.70	9.99%	163.08	1.72	n/a
HRTEX	31.30	9.82%	29.42	0.95	n/a
EPGL	22.50	9.76%	148.36	6.69	n/a
BESTHLDNG	18.20	9.64%	131.77	7.46	54.60

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FASFIN	1.60	-5.88%	0.51	0.32	n/a
FAREASTFIN	2.00	-4.76%	4.51	2.30	n/a
REPUBLIC	34.10	-4.21%	18.82	0.55	15.93
CONTININS	27.90	-3.79%	21.40	0.76	19.65
CENTRALINS	45.70	-3.79%	43.54	0.94	24.84

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PREMIERBAN

Dividend Declaration

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 13.10.2025; Time: 11:00 AM; Venue: Digital Platform: <https://premierbank.bdvirtualagm.com>. Record Date: 17.09.2025. The Company has also reported Consolidated EPS of Tk. 1.09, Consolidated NAV per share of Tk. 21.73 and Consolidated NOCFPS of Tk. (4.55) for the year ended December 31, 2024 as against Tk. 3.37, Tk. 22.08 and Tk. (4.89) respectively for the year ended December 31, 2023.

PREMIERBAN

Q2 Financials

Consolidated EPS was Tk. (1.33) for April-June 2025 as against Tk. 0.94 for April-June 2024; Consolidated EPS was Tk. (1.11) for January-June 2025 as against Tk. 1.58 for January-June 2024. Consolidated NOCFPS was Tk. (7.64) for January-June 2025 as against Tk. 3.13 for January-June 2024. Consolidated NAV per share was Tk. 20.53 as on June 30, 2025 and Tk. 22.32 as on June 30, 2024. EPS decreased due to increase of interest expenses as well as decrease of exchange earnings.

CONFIDCEM

Rejection of review of rejected rights issue application

Refer to their earlier news disseminated by DSE on 15.07.2025 regarding reconsideration of Rights Issue Proposal, Bangladesh Securities and Exchange Commission has informed the company that under the Securities and Exchange Commission (Rights Issue) Rules, 2006, there is no provision for review or reconsideration of rejected rights issue applications. Accordingly, the commission has informed the company that their application cannot be reviewed or reconsidered.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ACMEPL	17.3	17.3	1	79400	1.374
AL-HAJTEX	163.5	163.5	3	19900	3.254
AMBEEPHA	867.1	867.1	1	738	0.64
BEACHHATCH	57.5	57.5	1	8700	0.5
BEACONPHAR	151.5	125	2	21000	3.075
BRACBANK	72.5	72	2	458000	33.124
BSC	122	122	1	97000	11.834
CENTRALINS	47.5	47.5	1	65000	3.087
CITYGENINS	58	55.5	2	65822	3.778
CLICL	52.6	52.5	2	45000	2.364
DBH1STMF	5.8	5.8	1	90000	0.522
DSSL	11.6	11.6	1	300000	3.48
EIL	37	37	1	19000	0.703
ENVOYTEX	51	51	1	15000	0.765
ESQUIRENIT	25.6	25.6	1	20000	0.512
EXIM1STMF	4.5	4.5	1	295000	1.327
FINEFOODS	279	260	5	131600	36.155
FUWANGFOOD	15.9	15.9	1	48000	0.763
GQBALLPEN	420	390	3	52911	21.145
HAKKANIPUL	85.8	85.8	2	47398	4.067
ISNLTD	95.2	87	6	59370	5.429
LHB	60	60	1	22000	1.32
MALEKSPIN	35.2	32	3	676630	23.757
NATLIFEINS	119	119	2	34319	4.084
OIMEX	25.6	25.2	2	109000	2.77
PDL	6.4	6.4	1	313400	2.006
PRAGATILIF	160.5	160.5	1	3500	0.562
PROVATIINS	38.1	38.1	1	63682	2.426
PTL	62.6	57.8	2	104910	6.144
QUASEMIND	39	39	1	13000	0.507
RELIANCE1	14	14	2	135750	1.901
SEAPEARL	53.9	53.9	1	129600	6.985
SHEPHERD	20.1	18.5	3	135000	2.658
SIMTEX	20.1	20.1	2	187412	3.767
SOUTHEASTB	9.6	9.6	1	150000	1.44
SPCERAMICS	22.1	22.1	1	125000	2.763
TILIL	76	69.5	2	38000	2.804

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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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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		