

Daily Market Review

Market closed negative
28-Sep-2025

DSEX WENT DOWN BY 35.1 POINTS

Market closed negative today with decrease in turnover.

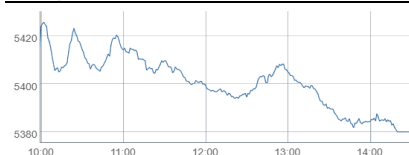
Broad index DSEX went down by 35.1 points.

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

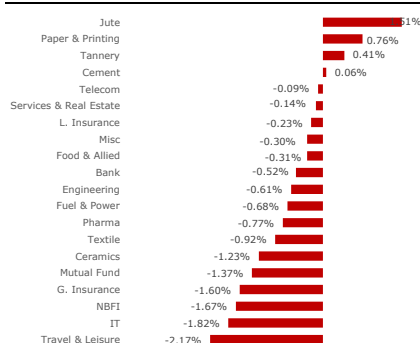
Turnover decreased by 20.4% to BDT 5,642mn (USD 46mn).

Textile sector dominated the turnover chart covering 16.0% of the total turnover.

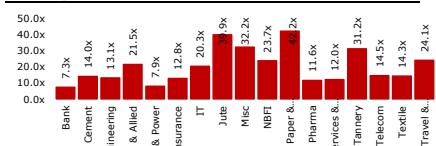
Intraday Performance of DSEX



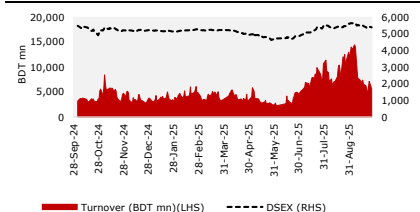
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,380.08	(35.1)	-0.65%	5,216.44	3.14%
DS30	2,085.94	(17.1)	-0.81%	1,939.73	7.54%
DS5	1,164.76	(6.7)	-0.57%	1,168.90	-0.35%
S&P 500	6,395.78	(15.5)	-0.24%	5,881.63	8.74%
Nikkei 225	45,354.99	(399.9)	-0.87%	39,894.54	13.69%
FTSE 100	9,284.83	70.9	0.77%	8,132.56	14.17%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	5,642	7,089	-1,448	-20.42%	8,589
Turnover (USD mn)	46	58	-12	-20.42%	72
Volume (mn)	167	236	-69	-29.17%	289
Market Cap (BDT bn)	7,227	7,234	-8	-0.11%	
Market Cap (USD bn)	59	59	0	-0.11%	
Market P/E (x)	11.8				
Particulars	Winner	Loser	Unchanged		
Market Breadth	70	282	44		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	693,897	19.43%	-0.5%	669.6	11.87%
Telecom	580,726	16.26%	-0.1%	79.3	1.41%
Pharma	576,034	16.13%	-0.8%	718.8	12.74%
Fuel & Power	307,836	8.62%	-0.7%	252.5	4.48%
Engineering	290,592	8.14%	-0.6%	401.8	7.12%
Food & Allied	263,705	7.38%	-0.3%	295.4	5.24%
Misc	233,982	6.55%	-0.3%	486.1	8.62%
Textile	126,977	3.55%	-0.9%	900.7	15.96%
NBFI	102,264	2.86%	-1.7%	104.9	1.86%
Cement	99,089	2.77%	0.1%	58.1	1.03%
G. Insurance	81,050	2.27%	-1.6%	114.1	2.02%
L. Insurance	54,688	1.53%	-0.2%	373.9	6.63%
Travel & Leisure	38,267	1.07%	-2.2%	52.2	0.93%
IT	27,600	0.77%	-1.8%	305.0	5.41%
Mutual Fund	26,221	0.73%	-1.4%	73.5	1.30%
Paper & Printing	24,358	0.68%	0.8%	231.7	4.11%
Tannery	23,339	0.65%	0.4%	173.5	3.08%
Services & Real Estate	21,676	0.61%	-0.1%	270.5	4.80%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SAPORTL	41.80	1.95%	246.85	5.97	13.40
BRACBANK	69.60	-0.57%	231.78	3.31	9.78
ORIONINFU	521.10	-3.00%	217.59	0.41	279.16
KBPPWIBL	151.90	-1.43%	190.03	1.25	759.50
SONALIPAPR	280.40	3.93%	172.62	0.63	32.21

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FIRSTSBANK	2.20	10.00%	5.17	2.38	n/a
APEXSPINN	175.80	9.94%	62.19	0.37	43.66
EXIMBANK	3.40	9.68%	13.48	3.99	13.08
KPPL	14.90	9.56%	2.33	0.16	n/a
PLFSL	1.20	9.09%	0.73	0.66	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
STANCERAM	73.30	-7.57%	0.40	0.01	n/a
INTECH	34.50	-6.76%	54.03	1.52	n/a
MITHUNKNIT	15.70	-6.55%	0.87	0.05	-
CAPMBDBLMF	10.50	-6.25%	8.15	0.76	n/a
NORTHNRINS	28.50	-5.63%	1.72	0.06	14.54

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CITYBANK

Board approves the establishment of a new subsidiary

The Board of Directors of City Bank PLC in its meeting held on September 25, 2025 has approved the establishment of a new subsidiary under the proposed name "City Credit Bureau". This initiative aims to support the Bank's continuous business growth.

NORTHRINNS

Category Change

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., 28.09.2025 as per provision 1(e) of BSEC Directive No. BSEC/CMRCD/2009-193/77, dated May 20, 2024 regarding non-disbursement of the approved dividend within the stipulated time frame.

GENEXIL

Category Change

The Company will be placed in 'B' category from existing 'Z' category with effect from September 29, 2025 as the Company has reported disbursement of 3% Cash Dividend for the year ended June 30, 2024.

ENVOYTEX

Dividend Declaration

The Board of Directors has recommended 30% Cash Dividend for the year ended June 30, 2025. Date of AGM: 06.12.2025, Time: 11:00 AM, Venue: Hybrid System at Gulshan Shooting Club, Gulshan Avenue, beside Police Plaza, Dhaka-1212. Record Date: 26.10.2025. The Company has also reported EPS of Tk. 8.40, NAV per share of Tk. 58.32 and NOCFPS of Tk. 4.77 for the year ended June 30, 2025 as against Tk. 3.58, Tk. 51.93 and Tk. 3.68 respectively for the year ended June 30, 2024.

CVOPRL

Dividend Declaration

The Board of Directors has recommended 11% Cash and 9% Stock Dividend for the year ended June 30, 2025. Stock Dividend shall be issued out of the retained earnings of the company subject to approval of the Bangladesh Securities and Exchange Commission (BSEC). Date of AGM: 10.12.2025; Time: 11:00 AM; Venue: Venue details will be conveyed through the AGM notice. Record Date: 30.10.2025. The Company has also reported EPS of Tk. 3.82, NAV per share of Tk. 13.12 (without revaluation), NAV per share of Tk. 30.29 (with revaluation), and NOCFPS of Tk. 7.65 for the year ended June 30, 2025 as against Tk. 2.34, Tk. 10.31 (without and with revaluation) and Tk. 2.77 respectively for the year ended June 30, 2024. Reasons and Disclosures for recommendation of Stock Dividend: 1. Regulatory requirements to raise capital to maintain a minimum paid-up capital of BDT 30 Crore. 2. Stock dividend has been recommended in view to utilize its retained amount as paid up capital for improving the capital adequacy of the Company. 3. Such declaration of stock dividend or bonus shares is out of the accumulated profit or retained earnings; and The declaration has not been made from the capital reserve or revaluation reserve, or any unrealized gain, or out of profit earned prior to incorporation of the company, or through reducing paid-up capital or through doing anything so that the post-dividend retained earnings become negative or a debit balance.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AL-HAJTEX	160	160	1	3450	0.552
AMANFEED	26.7	26.7	1	72000	1.922
APEXSPINN	165	151.1	5	76936	11.934
BDLAMP5	155.2	155.2	1	3223	0.5
BERGERPBL	1425	1425	1	50000	71.25
BRACBANK	70	70	1	3000000	210
CITYGENINS	64	62.8	2	79687	5.04
DBH1STMF	6.4	6.4	1	125000	0.8
EBL	23.8	23.8	2	3000000	71.4
FINEFOODS	307	300	4	46535	14.211
GQBALLPEN	530	530	1	1300	0.689
ICBAGRANI1	7.2	7.2	2	214025	1.541
ISNLTD	116.5	116.5	1	15000	1.748
KBPPWBIL	154.1	146	2	67950	10.443
KOHINOOR	529	529	1	4005	2.119
LOVELLO	107.1	107.1	1	5000	0.535
MALEKSPIN	34.6	31.1	2	106000	3.563
MONNOFABR	22.3	22.3	1	100000	2.23
ORIONINFU	549	515	4	15041	7.92
PRAGATILIF	213.9	213.9	1	3050	0.652
RANFOUNDRY	168.2	168.1	2	8000	1.345
RELIANCE1	15	15	1	40000	0.6
SEMLLECMF	7.8	7.8	1	224851	1.754
SHYAMPUG	195	195	3	10850	2.116
SONALILIFE	80	80	1	22000	1.76
UCB	10.7	10.7	1	389000	4.162

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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

Bulus Center

+880 2955 8481

Extensions of Head Office

Dilkusha +880 1701 205 090	Dilkusha (NIK Tower) +880 1701 205 000	Dhanmondi +880 1713 205 703	Nikunja +880 1701 205 013	Mohammadpur +880 1324 243 212
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		