

Daily Market Review

Market closed positive
31-Aug-2025

DSEX WENT UP BY 76.4 POINTS

Market closed positive today with increase in turnover.

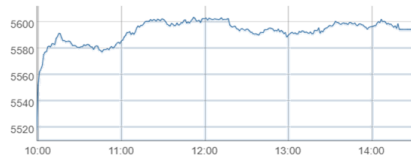
Broad index DSEX went up by 76.4 points.

Engineering, IT and Ceramics are the top three sectors that closed positive today while only the Mutual Fund and Textile sectors closed negative today.

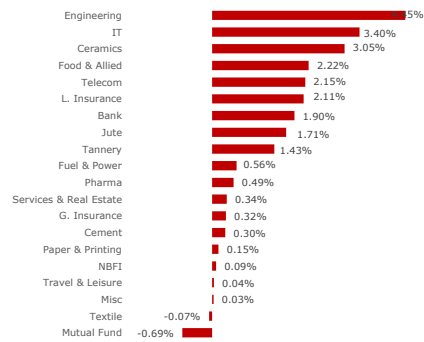
Turnover increased by 14.5% to BDT 12,964mn (USD 106mn).

Pharma sector dominated the turnover chart covering 14.5% of the total turnover.

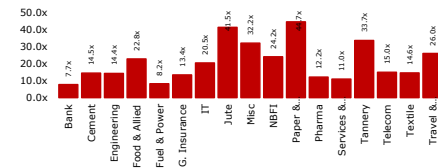
Intraday Performance of DSEX



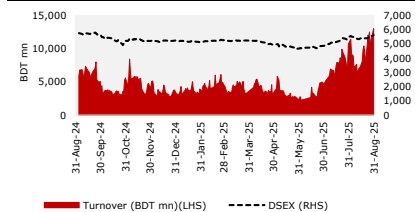
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,594.39	76.4	1.39%	5,216.44	7.25%
DS30	2,193.72	36.7	1.70%	1,939.73	13.09%
DSES	1,227.71	20.5	1.70%	1,168.90	5.03%
S&P 500	6,460.26	(41.6)	-0.64%	5,881.63	9.84%
Nikkei 225	42,718.47	(110.3)	-0.26%	39,894.54	7.08%
FTSE 100	9,187.34	(29.5)	-0.32%	8,132.56	12.97%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	12,964	11,323	1,641	14.49%	6,705
Turnover (USD mn)	106	92	13	14.49%	56
Volume (mn)	404	376	28	7.51%	241
Market Cap (BDT bn)	7,280	7,184	97	1.35%	
Market Cap (USD bn)	59	58	1	1.35%	
Market P/E (x)	12.3				
Particulars	Winner	Loser	Unchanged		
Market Breadth	201	141	56		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	733,519	19.74%	1.9%	1,358.4	10.48%
Pharma	606,046	16.31%	0.5%	1,874.5	14.46%
Telecom	597,649	16.09%	2.1%	427.7	3.30%
Fuel & Power	320,274	8.62%	0.6%	750.7	5.79%
Engineering	302,521	8.14%	4.5%	1,170.4	9.03%
Food & Allied	280,080	7.54%	2.2%	1,076.3	8.30%
Misc	233,361	6.28%	0.0%	790.3	6.10%
Textile	129,025	3.47%	-0.1%	1,611.0	12.43%
NBFI	104,036	2.80%	0.1%	275.9	2.13%
Cement	102,646	2.76%	0.3%	143.5	1.11%
G. Insurance	84,752	2.28%	0.3%	555.9	4.29%
L. Insurance	56,434	1.52%	2.1%	595.5	4.59%
Travel & Leisure	41,383	1.11%	0.0%	262.7	2.03%
IT	27,896	0.75%	3.4%	929.4	7.17%
Mutual Fund	26,830	0.72%	-0.7%	142.7	1.10%
Paper & Printing	25,837	0.70%	0.1%	431.4	3.33%
Tannery	23,789	0.64%	1.4%	133.3	1.03%
Services & Real Estate	19,473	0.52%	0.3%	175.2	1.35%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
LOVELLO	103.30	9.08%	360.09	3.58	33.98
BRACBANK	76.50	7.14%	333.77	4.47	10.74
ROBI	28.80	3.97%	327.04	11.50	19.73
ORIONINFU	535.00	2.94%	318.15	0.61	286.61
CITYBANK	25.40	0.40%	258.59	10.16	5.70

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NTC	214.50	10.00%	11.46	0.05	n/a
BAYLEASING	4.40	10.00%	0.71	0.16	n/a
ETL	11.00	10.00%	99.89	9.10	n/a
SHYAMPSUG	165.70	9.95%	12.22	0.08	n/a
ORIONPHARM	39.80	9.94%	163.26	4.14	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PLFSL	1.40	-6.67%	4.26	3.03	n/a
SAFKOSPINN	15.50	-6.06%	7.57	0.48	n/a
PREMIERBAN	6.40	-5.88%	21.24	3.27	n/a
FAREASTFIN	1.90	-5.00%	2.78	1.45	n/a
EBL1STMF	4.20	-4.55%	2.37	0.56	n/a

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ETL

Board decision to purchase/import brand new Capital Machineries

The company has informed that the Board of Directors of the company in its meeting held on 30 August 2025 has taken a decision to purchase/import a brand new Capital Machineries in order to increase the production of Denim Fabrics. The List of Machineries as under: A. Continuous Denim Dyeing Sizing Machine with Standard Accessories, Quantity: 1 Set; B. Highspeed Warping Machine with Standard Accessories, Quantity: 1 SET. Brand/Origin: Panon/Taiwan. Total Value including Freight charges: USD 1,200,000. Exchange Rate as on 30.08.2025: 121.86. Value in BDT: 146,232,000.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ABB1STMF	3.6	3.6	1	147000	0.529
ACMELAB	78	78	1	6500	0.507
AIL	63.9	63.9	1	145245	9.281
AL-HAJTEX	151	151	1	10200	1.54
AOL	16.4	16.4	2	90000	1.476
BEXIMCO	99.6	99.6	1	8501	0.847
BRACBANK	76	71.4	3	754000	55.33
BSCPLC	152.1	152.1	1	3500	0.532
CITYBANK	26.5	26.5	1	21000	0.556
CITYGENINS	58	56	4	101000	5.709
DBH1STMF	6.3	6.3	1	500000	3.15
EHL	92.7	92.7	1	9009	0.835
ENVOYTEX	55.5	55.5	2	41000	2.276
EXIM1STMF	4.7	4.4	3	951100	4.245
FINEFOODS	280	272	11	148369	41.331
GP	305	305	1	4240	1.293
IFIC	6.2	6.2	1	100000	0.62
INTRACO	23.7	23.7	1	100000	2.37
KBPPWBIL	105.4	105.4	1	5050	0.532
LEGACYFOOT	72.3	71.9	9	417400	30.093
LOVELLO	104	97	2	16000	1.594
MONNOFABR	17.8	17.8	1	300000	5.34
NRBBANK	9.3	9.3	1	54000	0.502
ORIONINFU	520	500	6	170000	86.104
PIONEERINS	51	51	1	10000	0.51
PTL	58.2	56.9	14	1030183	59.723
RELIANCE1	15.5	15	4	224400	3.45
SEAPPEARL	61.9	60.6	2	490000	30.019
SIMTEX	20.4	19.8	6	221868	4.449
TILIL	80	75	6	144978	11.312
YPL	17	17	1	40500	0.689

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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

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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	
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