Weekly Market Review

Market closed negative

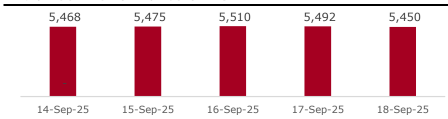
18-Sep-2025

DSEX WENT DOWN BY 73.9 POINTS

Market closed negative this week. Broad index DSEX went down by 73.9 points. Services & Real Estate, Textile and Engineering are the top three sectors that closed positive this week while NBFI, Travel & Leisure, and Life Insurance are the top three sectors that closed negative this week.

Average turnover decreased by 39.02% to BDT 7.0bn (USD 57mn). Pharma sector dominated the turnover chart covering 13.7% of the total turnover.

Intraweek Performance of DSEX



Index

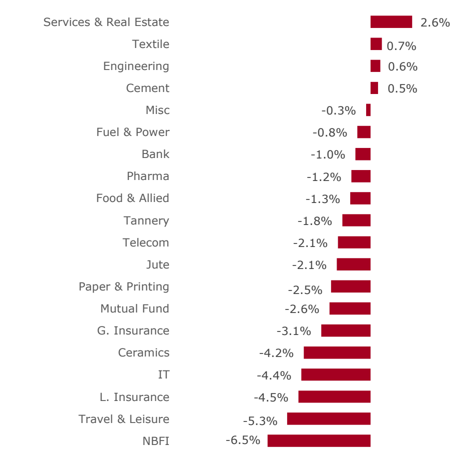
Particulars	Value	Δ Points	Weekly Δ %	Dec'24 Value	YTD Δ %
DSEX	5,449.93	(73.9)	-1.34%	5,199.62	4.81%
DS30	2,107.14	(43.9)	-2.04%	1,930.97	9.12%
DSES	1,178.20	(18.1)	-1.51%	1,155.10	2.00%
S&P 500	6,395.78	255.20	4.16%	5,942.46	7.63%
Nikkei 225	45,303.43	5,591.90	14.08%	39,522.25	14.63%
FTSE 100	9,240.15	422.69	4.79%	8,218.60	12.43%

Market Statistics

Particulars	This Week	Last Week	Weekly Δ	Weekly Δ %
Avg.Turnover (BDT mn)	7,011	11,497	(4,486.0)	-39.02%
Avg.Turnover (USD mn)	57	94	(36.5)	-39.02%
Avg. Volume (mn)	225	366	(140.9)	-38.46%
Market Cap (BDT bn)	7,245	7,246	(1.5)	-0.02%
Market Cap (USD bn)	59	59	(0.0)	-0.02%
Market P/E (x)	11.9			

Particulars	Gainer	Loser
Market Breadth	65	306

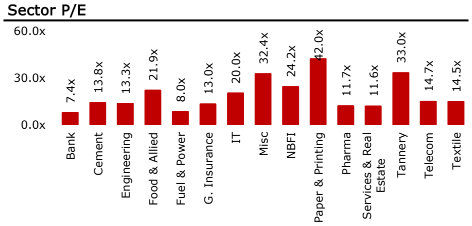
Sector Return



Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	710,963	19.6%	-1.0%	801	11.43%
Cement	97,753	2.7%	0.5%	72	1.03%
Ceramics	19,105	0.5%	-4.2%	123	1.75%
Engineering	294,532	8.1%	0.6%	791	11.28%
Food & Allied	268,383	7.4%	-1.3%	489	6.97%
Misc	235,148	6.5%	-0.3%	517	7.37%
Fuel & Power	312,075	8.6%	-0.8%	290	4.14%
G. Insurance	82,159	2.3%	-3.1%	172	2.45%
L. Insurance	55,279	1.5%	-4.5%	386	5.50%
IT	27,209	0.8%	-4.4%	396	5.65%
Jute	3,014	0.1%	-2.1%	38	0.53%
Mutual Fund	26,616	0.7%	-2.6%	123	1.75%
NBFI	104,074	2.9%	-6.5%	209	2.98%
Paper & Printing	24,239	0.7%	-2.5%	236	3.37%
Pharma	582,714	16.1%	-1.2%	962	13.71%
Services & Real Estate	20,922	0.6%	2.6%	235	3.36%
Tannery	23,288	0.6%	-1.8%	50	0.72%
Telecom	586,475	16.2%	-2.1%	216	3.08%
Textile	128,660	3.6%	0.7%	752	10.73%
Travel & Leisure	39,631	1.1%	-5.3%	150	2.14%

Sector P/E



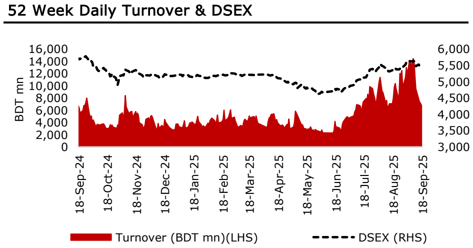
Top Turnover

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
KBPPWBIL	163.30	6.7%	315.82	2.07	816.50
SAPORTL	37.60	10.6%	203.91	5.60	12.05
ROBI	29.40	-6.4%	178.01	5.84	20.14
ASIATICLAB	63.20	13.1%	157.15	2.57	27.72
TECHNODRUG	40.70	14.6%	154.05	3.99	21.65

Top Gainers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ENVOYTEX	61.00	18.7%	24.49	1.50	7.59
SHYAMPSUG	204.30	16.9%	24.90	0.05	n/a
UCB	11.10	15.6%	19.03	6.65	46.25
TECHNODRUG	40.70	14.6%	240.42	3.99	21.65
CROWNCEMNT	61.30	14.2%	7.86	0.29	12.91

52 Week Daily Turnover & DSEX



Top Losers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PRIMEFIN	2.10	-27.6%	1.18	0.55	n/a
SIBL	4.10	-24.1%	1.26	0.65	n/a
GIB	1.80	-21.7%	4.08	1.87	n/a
CAPMBDBLMF	10.30	-20.2%	17.11	1.78	n/a
EXIMBANK	3.60	-18.2%	5.61	2.06	13.85

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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	**Dilkusha (NIK Tower)**	**Dhanmondi**	**Nikunja**	**Mohammadpur**
+880 1701 205 090	+880 1701 205 000	+880 1713 205 703	+880 1701 205 013	+880 1324 243 212
Bashundhara	**Mirpur-1**	**Mirpur-12**	**Banasree**	**Uttara**
+880 1718 106 217	+880 1713 205 723	+880 1911 197 188	+880 1701 205 075	+880 1913 128 156

Branch Offices

Chattogram	**Sylhet**
+880 1701 205 038	+880 1713 205 760

Digital Booths

Khulna	**Barishal**	**Cumilla**	**Jashore**	**Gazipur**
+880 1717 411 466	+880 1713 205 762	+880 1324 243 163	+880 1324 243 203	+880 1324 243 165
Feni	**Khatungonj**	**Chawkbazar**	**Madhobdi**	
+880 1324 243 210	+880 1713 205 742	+880 1817 206 965	+880 1324 243 156	
Narayangonj	**Agrabad**			
+880 1324 243 207	+880 1324 243 198			