

## Weekly Market Review

Market closed negative

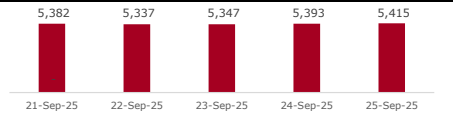
25-Sep-2025

## DSEX WENT DOWN BY 34.8 POINTS

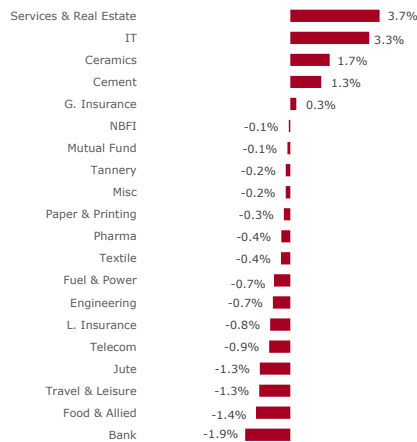
Market closed negative this week. Broad index DSEX went down by 34.8 points. Services & Real Estate, IT and Ceramics are the top three sectors that closed positive this week while Bank, Food & Allied, and Travel & Leisure, are the top three sectors that closed negative this week.

Average turnover decreased by 16.7% to BDT 5,838bn (USD 48mn). Textile sector dominated the turnover chart covering 15.5% of the total turnover.

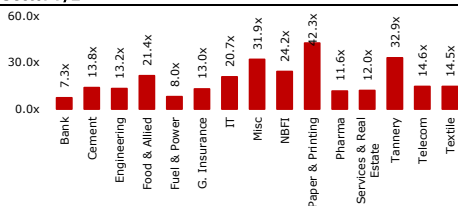
## Intraweek Performance of DSEX



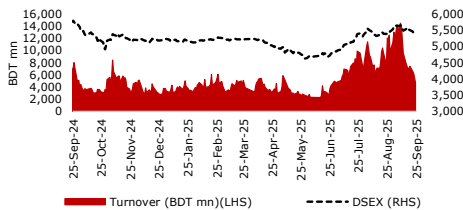
## Sector Return



## Sector P/E



## 52 Week Daily Turnover &amp; DSEX



## Index

Particulars	Value	Δ Points	Weekly Δ %	Dec'24 Value	YTD Δ %
DSEX	5,415.13	(34.8)	-0.64%	5,199.62	4.14%
DS30	2,103.04	(4.1)	-0.19%	1,930.97	8.91%
DSES	1,171.47	(6.7)	-0.57%	1,155.10	1.42%
S&P 500	6,395.78	255.20	4.16%	5,942.46	7.63%
Nikkei 225	45,754.93	6,043.40	15.22%	39,522.25	15.77%
FTSE 100	9,238.69	421.23	4.78%	8,218.60	12.41%

## Market Statistics

Particulars	This Week	Last Week	Weekly Δ	Weekly Δ %
Avg. Turnover (BDT mn)	5,838	7,011	(1,173.0)	-16.73%
Avg. Turnover (USD mn)	48	57	(9.5)	-16.73%
Avg. Volume (mn)	198	225	(27.1)	-12.01%
Market Cap (BDT bn)	7,234	7,245	(10.2)	-0.14%
Market Cap (USD bn)	59	59	(0.1)	-0.14%
Market P/E (x)	11.8			

Particulars	Gainer	Loser
Market Breadth	139	218

## Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	697,520	19.4%	-1.9%	624	10.68%
Cement	99,026	2.8%	1.3%	57	0.98%
Ceramics	19,422	0.5%	1.7%	64	1.09%
Engineering	292,379	8.1%	-0.7%	475	8.13%
Food & Allied	264,514	7.4%	-1.4%	354	6.06%
Misc	234,694	6.5%	-0.2%	412	7.06%
Fuel & Power	309,947	8.6%	-0.7%	246	4.21%
G. Insurance	82,368	2.3%	0.3%	162	2.77%
L. Insurance	54,812	1.5%	-0.8%	343	5.88%
IT	28,111	0.8%	3.3%	405	6.93%
Jute	2,976	0.1%	-1.3%	26	0.44%
Mutual Fund	26,583	0.7%	-0.1%	90	1.54%
NBFI	104,005	2.9%	-0.1%	122	2.09%
Paper & Printing	24,174	0.7%	-0.3%	176	3.01%
Pharma	580,513	16.2%	-0.4%	838	14.36%
Services & Real Estate	21,706	0.6%	3.7%	266	4.55%
Tannery	23,244	0.6%	-0.2%	36	0.62%
Telecom	581,277	16.2%	-0.9%	137	2.35%
Textile	128,153	3.6%	-0.4%	902	15.46%
Travel & Leisure	39,115	1.1%	-1.3%	91	1.56%

## Top Turnover

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SAPORTL	41.00	9.0%	242.78	6.10	13.21
KBPPWBIL	154.10	-5.6%	217.45	1.42	769.50
ORIONINFU	537.20	1.2%	196.69	0.39	277.13
FEKDIL	20.60	5.6%	163.63	7.97	10.81
TECHNODRUG	38.60	-5.2%	128.70	3.26	21.12

## Top Gainers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
GQBALLPEN	572.40	17.8%	44.62	0.06	n/a
GENEXIL	29.40	17.6%	4.66	1.26	10.21
SIMTEX	22.10	16.3%	21.64	3.07	17.84
DULAMIACOT	144.50	14.7%	6.82	0.06	411.88
DBH1STMF	6.60	13.8%	9.98	1.49	n/a

## Top Losers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BARKAPOWER	8.80	-20.7%	5.91	0.92	22.24
ZAHEENSPIN	5.40	-20.6%	4.92	0.60	n/a
ILFSL	1.30	-18.8%	0.10	0.10	n/a
SIBL	3.40	-17.1%	3.80	1.32	n/a
FIRSTSBANK	2.00	-16.7%	6.68	3.57	n/a

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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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Bulus Center

+880 2955 8481

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<b>Bashundhara</b> +880 1718 106 217	<b>Mirpur-1</b> +880 1713 205 723	<b>Mirpur-12</b> +880 1911 197 188	<b>Banasree</b> +880 1701 205 075	<b>Uttara</b> +880 1913 128 156

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<b>Feni</b> +880 1324 243 210	<b>Khatungonj</b> +880 1713 205 742	<b>Chawkbazar</b> +880 1817 206 965	<b>Madhobdi</b> +880 1324 243 156	
	<b>Narayangonj</b> +880 1324 243 207	<b>Agrabad</b> +880 1324 243 198		