

Weekly Market Review

Market closed flat

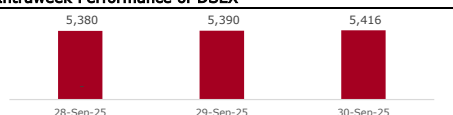
30-Sep-2025

DSEX WENT UP BY 0.7 POINTS

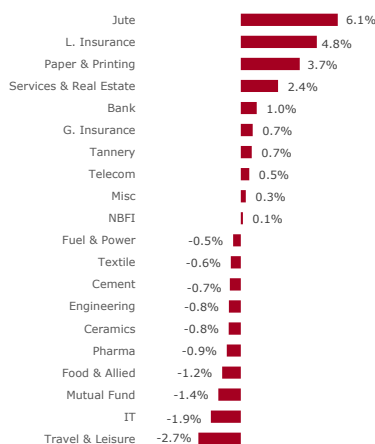
Market closed flat this week. Broad index DSEX went up by 0.7 points. Jute, Life Insurance and Paper & Printing are the top three sectors that closed positive this week while Travel & Leisure, IT and Mutual Fund, are the top three sectors that closed negative this week.

Average turnover increased by 6.23% to BDT 6,201mn (USD 50mn). Textile sector dominated the turnover chart covering 13.86% of the total turnover.

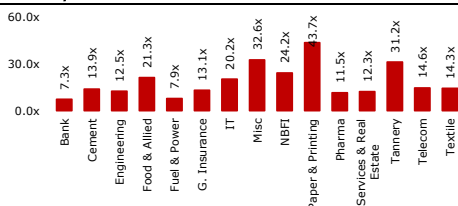
Intraweek Performance of DSEX



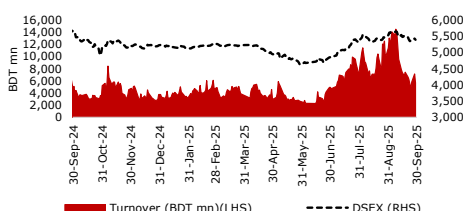
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Weekly Δ %	Dec'24 Value	YTD Δ %
DSEX	5,415.79	0.7	0.01%	5,199.62	4.16%
DS30	2,081.84	(21.2)	-1.01%	1,930.97	7.81%
DSES	1,171.98	0.5	0.04%	1,155.10	1.46%
S&P 500	6,395.78	(261.1)	-3.92%	5,942.46	7.63%
Nikkei 225	44,932.63	(822.3)	-1.80%	39,522.25	13.69%
FTSE 100	9,306.65	92.6	1.01%	8,218.60	13.24%

Market Statistics

Particulars	This Week	Last Week	Weekly Δ	Weekly Δ %
Avg.Turnover (BDT mn)	6,201	5,838	363.4	6.23%
Avg.Turnover (USD mn)	50	48	3.0	6.23%
Avg. Volume (mn)	183	198	(15.0)	-7.55%
Market Cap (BDT bn)	7,251	7,234	16.1	0.22%
Market Cap (USD bn)	59	59	0.1	0.22%
Market P/E (x)	11.8			
Particulars	Galner	Loser		
Market Breadth	149	214		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	704,566	19.6%	1.0%	844	13.61%
Cement	98,339	2.7%	-0.7%	59	0.95%
Ceramics	19,272	0.5%	-0.8%	47	0.76%
Engineering	290,176	8.1%	-0.8%	509	8.21%
Food & Allied	261,368	7.3%	-1.2%	286	4.62%
Misc	235,426	6.6%	0.3%	414	6.68%
Fuel & Power	308,414	8.6%	-0.5%	290	4.68%
G. Insurance	82,981	2.3%	0.7%	157	2.53%
L. Insurance	57,449	1.6%	4.8%	511	8.24%
IT	27,577	0.8%	-1.9%	320	5.17%
Jute	3,158	0.1%	6.1%	51	0.83%
Mutual Fund	26,205	0.7%	-1.4%	80	1.28%
NBFI	104,136	2.9%	0.1%	113	1.82%
Paper & Printing	25,076	0.7%	3.7%	295	4.75%
Pharma	575,311	16.0%	-0.9%	800	12.90%
Services & Real Estate	22,217	0.6%	2.4%	275	4.43%
Tannery	23,404	0.7%	0.7%	103	1.66%
Telecom	584,332	16.3%	0.5%	91	1.47%
Textile	127,334	3.5%	-0.6%	859	13.86%
Travel & Leisure	38,063	1.1%	-2.7%	54	0.87%

Top Turnover

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BRACBANK	69.50	-0.7%	284.85	4.10	9.76
ORIONINFU	528.80	-1.6%	241.26	0.46	283.29
SAPORTL	42.50	3.7%	231.81	5.54	13.62
SONALIPAPR	293.30	8.7%	220.68	0.77	33.69
KBPPWBIL	149.40	-3.0%	181.42	1.21	747.00

Top Gainers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FIRSTSBANK	2.60	30.0%	5.03	2.16	n/a
SIBL	4.40	29.4%	7.73	2.01	n/a
EXIMBANK	4.00	29.0%	11.88	3.28	15.38
GIB	1.80	20.0%	0.64	0.38	n/a
UNIONBANK	1.90	18.8%	2.10	1.21	10.18

Top Losers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
DBH1STMF	6.10	-7.6%	3.77	0.60	n/a
DBH1STMF	6.10	-7.6%	3.77	0.60	n/a
INTECH	34.20	-7.6%	41.03	1.17	n/a
EGEN	25.90	-6.8%	51.99	1.98	33.49
SEAPPEARL	45.30	-6.6%	36.73	0.79	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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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

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Feni +880 1324 243 210	Khatungonj +880 1713 205 742	Chawkbazar +880 1817 206 965	Madhobdi +880 1324 243 156	
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