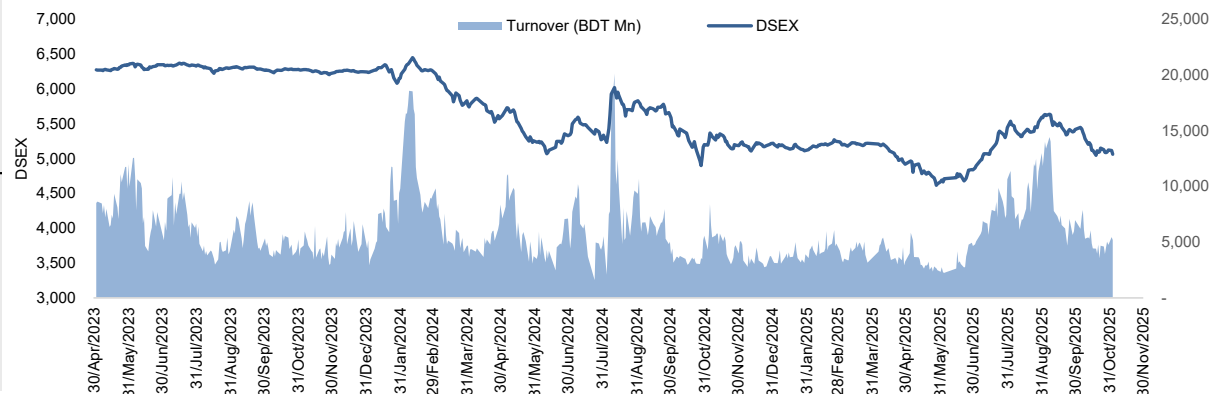


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.07%) lost 54.87 points and closed at 5,061.01. The blue-chip index DS30 (-1.11%), the Shariah-based index DSES (-1.15%), and the large-cap index CDSET (-0.70%) closed at 1,961.00, 1,066.62, and 1,042.87 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.02% followed by Fuel & Power (-1.23%), Engineering (-1.17%), Pharmaceutical (-1.05%), Food & Allied (-0.67%), Bank (-0.58%), and Telecommunication (-0.50%), respectively. Block trades contributed 5.7% of the overall market turnover. Summit Alliance Port Limited (-2.1%) was the most traded share with a turnover of BDT 277 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 5,061.01 | 5,115.88 | -54.87  | -1.07% | -3.0%  |
| DS30  | 1,961.00 | 1,982.95 | -21.95  | -1.11% | +1.1%  |
| DSES  | 1,066.62 | 1,078.98 | -12.36  | -1.15% | -8.8%  |
| CDSET | 1,042.87 | 1,050.19 | -7.32   | -0.70% | -2.2%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 45       | 300      | 53        | 398   |
| A Category (Equity) | 25       | 166      | 28        | 219   |
| B Category (Equity) | 8        | 69       | 3         | 80    |
| N Category (Equity) | 0        | 0        | 0         | 0     |
| Z Category (Equity) | 12       | 65       | 22        | 99    |
| Mutual Funds        | 2        | 15       | 18        | 35    |
| Corporate Bonds     | 1        | 3        | 1         | 5     |
| Treasury Bonds      | 1        | 0        | 0         | 1     |

\* Based on Traded Scrips

|              |           | Today     | Last Day  | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap         | Mn BDT    | 6,943,091 | 6,984,459 | -0.6%    |
|              | Mn USD    | 56,778    | 57,116    |          |
| Turnover     | Mn BDT    | 5,186     | 5,448     | -4.8%    |
|              | Mn USD    | 42        | 45        |          |
| Volume       | Mn Shares | 147       | 152       | -2.8%    |
| No. of Trade |           | 168,929   | 183,787   | -8.1%    |

\* Average Interbank Exchange Rate is BDT 122.29 as of Nov 03, 2025

|                                                                                         |                                                                                                |
|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| <b>Fahim Hassan</b><br>Research Analyst<br>(880) 1709636546<br>fahim.hassan@bracepl.com | <b>Md Rakibul Hasan</b><br>Research Associate<br>(880) 1708805229<br>rakibul.hasan@bracepl.com |
|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|

Figure: Sectorial Turnover (BDT Mn)

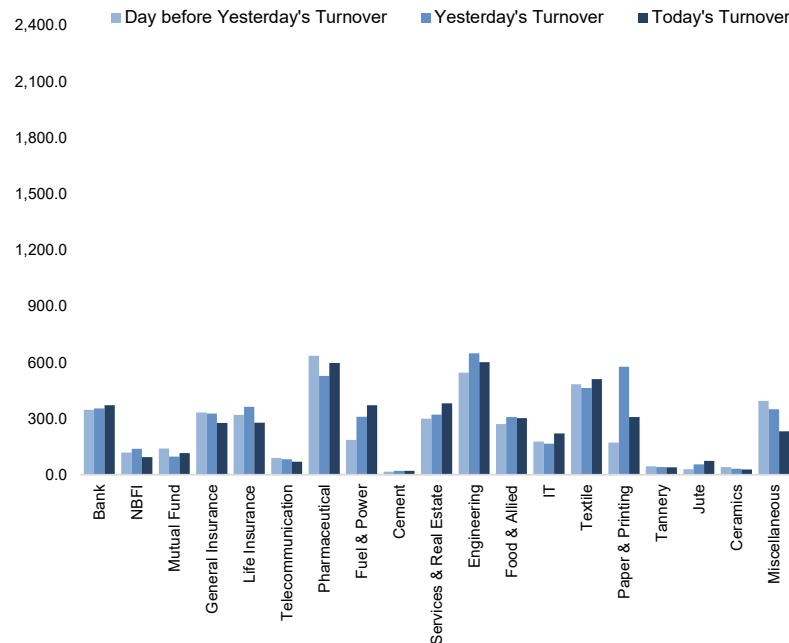
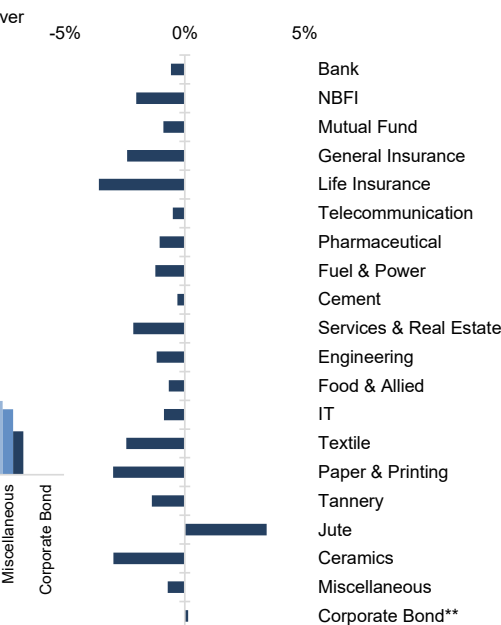


Figure: Sectorial Mcap Change



Market PE 15.2x

Market PB 1.1x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, several NBFIs and Banks

| Sector Index           | Closing | Opening | Points Δ | %Δ     | No. of Companies | Mcap (BDT Mn) | % of Total Mcap | Turnover (BDT Mn) | % of Total Turnover | PE    | PB   | Top Twenty Market Cap | Mcap (BDT Mn) | % of Total Mcap | Turnover (BDT Mn) | PE    | PB    |
|------------------------|---------|---------|----------|--------|------------------|---------------|-----------------|-------------------|---------------------|-------|------|-----------------------|---------------|-----------------|-------------------|-------|-------|
| Bank                   | 1,399   | 1,407   | -8.10    | -0.58% | 36               | 662,097       | 9.5%            | 371.2             | 7.6%                | NM    | 0.8x | GP                    | 379,569       | 11.1%           | 7.3               | 12.9x | 7.7x  |
| NBFI                   | 957     | 976     | -19.74   | -2.02% | 23               | 91,167        | 1.3%            | 94.1              | 1.9%                | NM    | NM   | SQURPHARMA            | 188,371       | 5.5%            | 56.1              | 7.9x  | 1.3x  |
| Mutual Fund            | 525     | 530     | -4.70    | -0.89% | 37               | 25,162        | 0.4%            | 115.0             | 2.4%                | NM    | 0.5x | ROBI                  | 151,900       | 4.5%            | 57.5              | 16.5x | 2.3x  |
| General Insurance      | 2,893   | 2,964   | -71.28   | -2.40% | 43               | 82,569        | 1.2%            | 277.0             | 5.7%                | 13.7x | 1.2x | BATBC                 | 136,350       | 4.0%            | 21.7              | 11.9x | 2.4x  |
| Life Insurance         | 1,955   | 2,028   | -72.81   | -3.59% | 15               | 51,991        | 0.7%            | 277.8             | 5.7%                | NM    | NM   | BRACBANK              | 136,179       | 4.0%            | 26.6              | 8.7x  | 1.3x  |
| Telecommunication      | 4,740   | 4,764   | -23.63   | -0.50% | 3                | 555,841       | 8.0%            | 70.2              | 1.4%                | 13.7x | 4.2x | WALTONHIL             | 126,791       | 3.7%            | 9.7               | 12.2x | 1.0x  |
| Pharmaceutical         | 2,940   | 2,971   | -31.10   | -1.05% | 34               | 557,436       | 8.0%            | 596.8             | 12.2%               | 12.5x | 1.5x | BEXIMCO               | 103,850       | 3.0%            | 0.2               | NM    | 1.3x  |
| Fuel & Power           | 1,073   | 1,087   | -13.40   | -1.23% | 23               | 284,284       | 4.1%            | 370.5             | 7.6%                | 14.9x | 0.6x | MARICO                | 87,318        | 2.6%            | 3.2               | 14.1x | 29.3x |
| Cement                 | 1,952   | 1,958   | -5.95    | -0.30% | 7                | 93,048        | 1.3%            | 21.3              | 0.4%                | 19.9x | 2.0x | UPGDCL                | 75,013        | 2.2%            | 4.7               | 6.3x  | 1.8x  |
| Services & Real Estate | 1,001   | 1,023   | -21.97   | -2.15% | 9                | 55,069        | 0.8%            | 381.1             | 7.8%                | 19.5x | 0.4x | BERGERPBL             | 70,001        | 2.1%            | 5.2               | 21.9x | 4.0x  |
| Engineering            | 2,352   | 2,380   | -27.84   | -1.17% | 42               | 265,294       | 3.8%            | 601.5             | 12.3%               | 14.5x | 0.8x | ISLAMIBANK            | 60,053        | 1.8%            | 5.1               | NM    | 0.8x  |
| Food & Allied          | 13,459  | 13,551  | -91.17   | -0.67% | 21               | 246,269       | 3.5%            | 302.8             | 6.2%                | 19.6x | 3.7x | BXPBARMA              | 49,920        | 1.5%            | 16.1              | 7.8x  | 1.0x  |
| IT                     | 1,812   | 1,828   | -15.96   | -0.87% | 11               | 23,896        | 0.3%            | 219.8             | 4.5%                | 25.8x | 1.5x | RENATA                | 49,526        | 1.5%            | 9.3               | 20.9x | 1.4x  |
| Textile                | 1,075   | 1,102   | -26.90   | -2.44% | 58               | 111,997       | 1.6%            | 510.2             | 10.4%               | 76.1x | 0.7x | UNILEVERCL            | 46,245        | 1.4%            | 0.7               | 64.0x | 22.3x |
| Paper & Printing       | 4,932   | 5,083   | -151.89  | -2.99% | 6                | 22,280        | 0.3%            | 307.9             | 6.3%                | NM    | 1.1x | DUTCHBANGL            | 38,378        | 1.1%            | 1.5               | 7.8x  | 0.7x  |
| Tannery                | 1,926   | 1,953   | -26.82   | -1.37% | 6                | 22,296        | 0.3%            | 39.0              | 0.8%                | NM    | 1.5x | PUBALIBANK            | 37,742        | 1.1%            | 6.2               | 6.1x  | 0.5x  |
| Jute                   | 13,343  | 12,902  | +440.86  | +3.42% | 3                | 2,937         | 0.0%            | 73.5              | 1.5%                | NM    | NM   | EBL                   | 37,023        | 1.1%            | 4.5               | 4.7x  | 0.8x  |
| Ceramics               | 380     | 391     | -11.66   | -2.98% | 5                | 17,029        | 0.2%            | 27.3              | 0.6%                | NM    | 1.1x | CITYBANK              | 36,814        | 1.1%            | 39.0              | 2.8x  | 0.6x  |
| Miscellaneous          | 3,991   | 4,020   | -28.55   | -0.71% | 15               | 216,749       | 3.1%            | 232.3             | 4.7%                | 98.9x | 1.7x | ICB                   | 36,078        | 1.1%            | 3.4               | NM    | 1.1x  |
| Corporate Bond**       | 17,291  | 17,266  | +25.12   | +0.15% | 16               | 38,174        | 0.5%            | 0.9               | 0.0%                | NM    | NM   | PRIMEBANK             | 30,872        | 0.9%            | 7.3               | 3.5x  | 0.7x  |
| Treasury Bond**        | 2,326   | 2,331   | -4.77    | -0.20% | 233              | 3,521,116     | 50.7%           | 0.2               | 0.0%                | NM    | NM   |                       |               |                 |                   |       |       |

| Top Ten Gainers | Close Price (BDT) | Δ%     | Turnover (BDT Mn) | PE    | PB    | Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE    | PB   | Most Traded Share | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB    |
|-----------------|-------------------|--------|-------------------|-------|-------|----------------------------|--------------------------|----------------------------|-------|------|-------------------|-------------------|-------|-------------------|-------|-------|
| NLTUBES         | 78.5              | +7.1%  | 38.8              | 40.9x | 0.6x  | SQURPHARMA                 | 108,958                  | 7.7%                       | 7.9x  | 1.3x | SAPORTL           | 45.8              | -2.1% | 277.2             | 17.0x | 1.3x  |
| NTC             | 170.7             | +6.7%  | 0.6               | NM    | NM    | ISLAMIBANK                 | 74,730                   | 5.3%                       | NM    | 0.8x | ANWARGALV         | 94.5              | -5.3% | 198.6             | NM    | 22.3x |
| CAPMBDBLMF      | 11.8              | +6.3%  | 39.2              | NM    | 1.4x  | BEXIMCO                    | 69,463                   | 4.9%                       | NM    | 1.3x | ORIONINFU         | 455.3             | +1.0% | 173.1             | NM    | 29.0x |
| ASIATICLAB      | 60.9              | +5.2%  | 121.7             | 29.1x | 1.1x  | BATBC                      | 50,233                   | 3.6%                       | 11.9x | 2.4x | SIMTEX            | 31.8              | +2.9% | 161.3             | 30.9x | 1.4x  |
| UCB             | 10.3              | +5.1%  | 38.2              | 4.0x  | 0.4x  | WALTONHIL                  | 46,773                   | 3.3%                       | 12.2x | 1.0x | MONOSPOOL         | 124.4             | -6.0% | 142.2             | 33.1x | 2.8x  |
| ISNLTD          | 90.2              | +4.88% | 65.5              | NM    | 37.6x | BRACBANK                   | 46,489                   | 3.3%                       | 8.7x  | 1.3x | KBPPWBIL          | 81.8              | -6.5% | 127.5             | NM    | 6.8x  |
| SONALIANSH      | 223.1             | +4.3%  | 73.4              | NM    | 3x    | GP                         | 44,708                   | 3.2%                       | 12.9x | 7.7x | CVOPRL            | 190.8             | +3.4% | 126.1             | 49.9x | 14.5x |
| PF1STMF         | 5.1               | +4.1%  | 12.0              | NM    | 0.9x  | RENATA                     | 32,968                   | 2.3%                       | 20.9x | 1.4x | ASIATICLAB        | 60.9              | +5.2% | 121.7             | 29.1x | 1.1x  |
| RINGSHINE       | 2.7               | +3.8%  | 1.1               | NM    | NM    | BXPBARMA                   | 23,409                   | 1.7%                       | 7.8x  | 1.0x | MIDLANDBNK        | 21.5              | +1.4% | 119.0             | 16.5x | 1.4x  |
| CVOPRL          | 190.8             | +3.4%  | 126.1             | 49.9x | 14.5x | PUBALIBANK                 | 22,905                   | 1.6%                       | 6.1x  | 0.5x | PRAGATILIF        | 236.4             | -8.2% | 103.9             | NM    | NM    |

| Top Ten Losers | Close Price (BDT) | Δ%     | Turnover (BDT Mn) | PE    | PB   | LHB    | OLYMPIC | ALARABANK | BEACONPHAR | PRIMEBANK | ROBI   | UTTARABANK | NBL    | BSRMLTD | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|----------------|-------------------|--------|-------------------|-------|------|--------|---------|-----------|------------|-----------|--------|------------|--------|---------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| PREMIERLEA     | 0.9               | -12.6% | 0.1               | NM    | NM   | 20,953 | 20,496  | 18,282    | 17,838     | 16,142    | 14,876 | 13,699     | 13,055 | 12,852  | PRIMEBANK   | 26.1                | 26.1                | 1.0          | 4,000           | 104.40            |
| FAREASTFIN     | 0.9               | -10.9% | 0.4               | NM    | NM   | 18,282 | 17,838  | 16,142    | 14,876     | 13,699    | 13,055 | 12,852     |        |         | ORIONINFU   | 430.0               | 430.0               | 4.0          | 44              | 18.92             |
| TAMIJTEX       | 236.4             | -8.2%  | 103.9             | NM    | NM   | 17,838 | 16,142  | 14,876    | 13,699     | 13,055    | 12,852 |            |        |         | ORIONINFU   | 430.0               | 430.0               | 4.0          | 44              | 18.92             |
| PRAGATILIF     | 236.4             | -8.2%  | 103.9             | NM    | NM   | 16,142 | 14,876  | 13,699    | 13,055     | 12,852    |        |            |        |         | ASIATICLAB  | 60.9                | 57.3                | 5.0          | 302             | 17.80             |
| SALAMCRST      | 15.9              | -8.1%  | 22.2              | 99.4x | 0.9x | 14,876 | 13,699  | 13,055    | 12,852     |           |        |            |        |         | SIMTEX      | 31.0                | 28.0                | 7.0          | 597             | 17.63             |
| IFILISLMF1     | 3.7               | -7.5%  | 0.4               | NM    | 0.6x | 13,699 | 13,055  | 12,852    |            |           |        |            |        |         | BEACONPHAR  | 120.0               | 100.1               | 7.0          | 132             | 15.47             |
| LEGACYFOOT     | 56.1              | -7.1%  | 15.9              | NM    | 5.0x | 13,055 | 12,852  |           |            |           |        |            |        |         | SUNLIFEINS  | 58.0                | 51.1                | 3.0          | 259             | 14.92             |
| RENWICKJA      | 490.6             | -7.0%  | 0.2               | NM    | NM   | 12,852 |         |           |            |           |        |            |        |         | PTL         | 53.0                | 51.0                | 2.0          | 208             | 10.72             |
| GOLDENSON      | 10.7              | -7.0%  | 10.0              | NM    | 0.6x |        |         |           |            |           |        |            |        |         | FINEFOODS   | 295.0               | 288.0               | 3.0          | 31              | 9.05              |
| TILIL          | 47.5              | -6.9%  | 54.7              | 10.6x | NM   |        |         |           |            |           |        |            |        |         | SAPORTL     | 43.5                | 43.5                | 3.0          | 176             | 7.68              |

\* Bank and NBFI sector PE calculation methodology has been modified.

\*\* The base of the Bond Index starts at 100, starting from Jan 13, 2022.

Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

| Block Trade  | Maximum Price (BDT) | Minimum Price | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------|-------------------|-----------------|--------------|
| PRIMEBANK    | 26.1                | 26.1          | 104.4             | 4,000           | 1            |
| ORIONINFU    | 430.0               | 430.0         | 18.9              | 44              | 4            |
| ORIONINFU    | 430.0               | 430.0         | 18.9              | 44              | 4            |
| ASIATICLAB   | 60.9                | 57.3          | 17.8              | 302             | 5            |
| SIMTEX       | 31.0                | 28.0          | 17.6              | 597             | 7            |
| BEACONPHAR   | 120.0               | 100.1         | 15.5              | 132             | 7            |
| SUNLIFEINS   | 58.0                | 51.1          | 14.9              | 259             | 3            |
| PTL          | 53.0                | 51.0          | 10.7              | 208             | 2            |
| FINEFOODS    | 295.0               | 288.0         | 9.1               | 31              | 3            |
| SAPORTL      | 43.5                | 43.5          | 7.7               | 176             | 3            |
| AL-HAJTEX    | 145.1               | 141.5         | 4.3               | 30              | 3            |
| ACI          | 185.0               | 185.0         | 3.7               | 20              | 2            |
| GP           | 300.0               | 300.0         | 3.0               | 10              | 1            |
| MPETROLEUM   | 222.0               | 222.0         | 2.2               | 10              | 1            |
| PADMAOIL     | 204.0               | 204.0         | 2.0               | 10              | 1            |
| IBBLPBOND    | 706.0               | 706.0         | 2.0               | 3               | 1            |
| JAMUNAOIL    | 192.0               | 192.0         | 1.9               | 10              | 1            |
| CAPMBDBLMF   | 11.1                | 10.8          | 1.6               | 150             | 2            |
| LOVELLO      | 90.2                | 90.2          | 1.6               | 18              | 1            |
| CITYGENINS   | 76.2                | 76.2          | 1.1               | 14              | 1            |
| PRAGATILIF   | 275.0               | 275.0         | 0.9               | 3               | 1            |
| AIL          | 55.5                | 55.5          | 0.5               | 9               | 1            |
| <b>Total</b> |                     |               | <b>295.8</b>      |                 | <b>57</b>    |

**Important DSE News**
**ISNLTD**

**(Q1 Un-audited):** EPS was Tk. (0.01) for July-September 2025 as against Tk. (0.05) for July-September 2024; NOCFPS was Tk. 0.45 for July-September 2025 as against Tk. 0.41 for July-September 2024. NAV per share was Tk. 2.40 as on September 30, 2025 and Tk. 2.42 as on June 30, 2025.

**ALARABANK**

The company has informed that the Board has appointed Mr. Mohd. Rafat Ullah Khan as the Managing Director (Acting) of the company.

**ISLAMICFIN**

Mr. Abul Quasem Haider, Chairman of the Company, has completed his buying of 2,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated by DSE on 19.10.2025.

**PRIMEBANK**

Refer to their earlier news disseminated by DSE on 30.10.2025 regarding sale and buy declarations among the sponsors and/or directors, the company has further informed that the buy declaration of Mr. Md. Shahadat Hossain, one of the Directors of the company, was inadvertently reported as 95,324 shares instead of 95,326 shares.

**Upcoming Corporate Events**

| DSE Ticker | Right Share | Dividend |       | Event       | Date      |
|------------|-------------|----------|-------|-------------|-----------|
|            |             | Stock    | Cash  |             |           |
| LOVELLO    |             | 5.0%     | 11.0% | Record Date | 6-Nov-25  |
| INDEXAGRO  |             | 5.0%     | 12.0% | Record Date | 9-Nov-25  |
| LANKABAFIN |             | 0.0%     | 0.0%  | Record Date | 10-Nov-25 |
| APEXTANRY  |             | 0.0%     | 0.0%  | Record Date | 10-Nov-25 |
| ANLIMAYARN |             | 0.0%     | 0.0%  | Record Date | 10-Nov-25 |
| BSRMSTEEL  |             | 0.0%     | 50.0% | Record Date | 10-Nov-25 |
| BSRMLTD    |             | 0.0%     | 50.0% | Record Date | 10-Nov-25 |
| LHB        |             | 0.0%     | 18.0% | Record Date | 11-Nov-25 |
| SUMITPOWER |             | 0.0%     | 10.5% | Record Date | 11-Nov-25 |
| SAMORITA   |             | 0.0%     | 5.0%  | Record Date | 12-Nov-25 |
| SHYAMPSUG  |             | 0.0%     | 0.0%  | Record Date | 12-Nov-25 |
| FEKDIL     |             | 0.0%     | 12.0% | Record Date | 13-Nov-25 |
| MONNOAGML  |             | 0.0%     | 5.0%  | Record Date | 13-Nov-25 |
| KDSALTD    |             | 0.0%     | 10.0% | Record Date | 13-Nov-25 |
| ISNLTD     |             | 0.0%     | 0.0%  | Record Date | 13-Nov-25 |
| MATINSPINN |             | 0.0%     | 35.0% | Record Date | 13-Nov-25 |
| RENWICKJA  |             | 0.0%     | 0.0%  | Record Date | 13-Nov-25 |

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