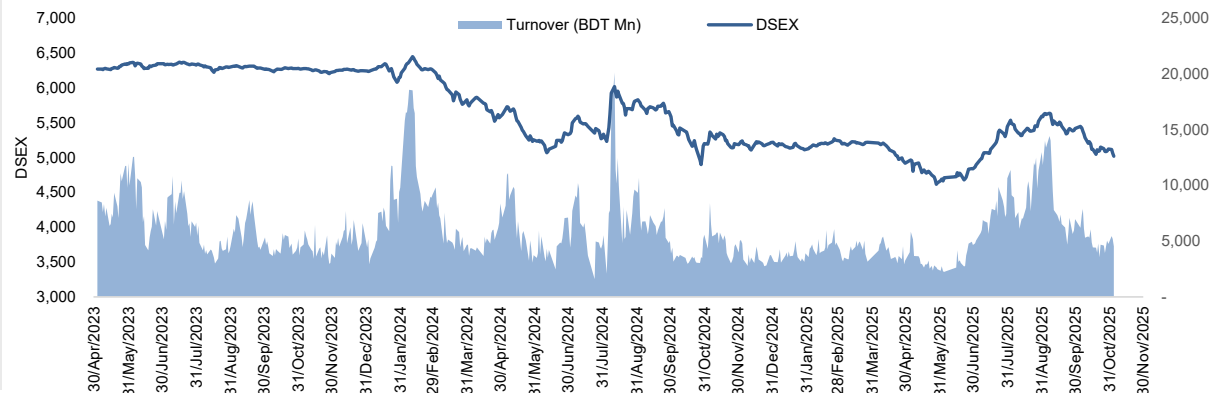


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.83%) lost 41.94 points and closed at 5,019.07. The blue-chip index DS30 (-0.75%), the Shariah-based index DSES (-1.02%), and the large-cap index CDSET (-0.61%) closed at 1,946.25, 1,055.72, and 1,036.48 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.21% followed by Engineering (-1.04%), Fuel & Power (-0.86%), Pharmaceutical (-0.82%), NBFi (-0.65%), Bank (-0.56%), and Telecommunication (+0.40%), respectively. Block trades contributed 3.2% of the overall market turnover. Summit Alliance Port Limited (+1.3%) was the most traded share with a turnover of BDT 308 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,019.07	5,061.01	-41.94	-0.83%	-3.8%
DS30	1,946.25	1,961.00	-14.74	-0.75%	+0.3%
DSES	1,055.72	1,066.62	-10.90	-1.02%	-9.7%
CDSET	1,036.48	1,042.87	-6.39	-0.61%	-2.8%

	Advanced	Declined	Unchanged	Total
All Category	56	277	63	396
A Category (Equity)	25	167	26	218
B Category (Equity)	12	58	9	79
N Category (Equity)	0	0	0	0
Z Category (Equity)	19	52	28	99
Mutual Funds	6	17	12	35
Corporate Bonds	0	2	1	3
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,905,903	6,943,091	-0.5%
	Mn USD	56,473	56,778	
Turnover	Mn BDT	4,536	5,186	-12.5%
	Mn USD	37	42	
Volume	Mn Shares	126	147	-14.5%
No. of Trade		152,967	168,929	-9.4%

* Average Interbank Exchange Rate is BDT 122.29 as of Nov 04, 2025

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Figure: Sectorial Turnover (BDT Mn)

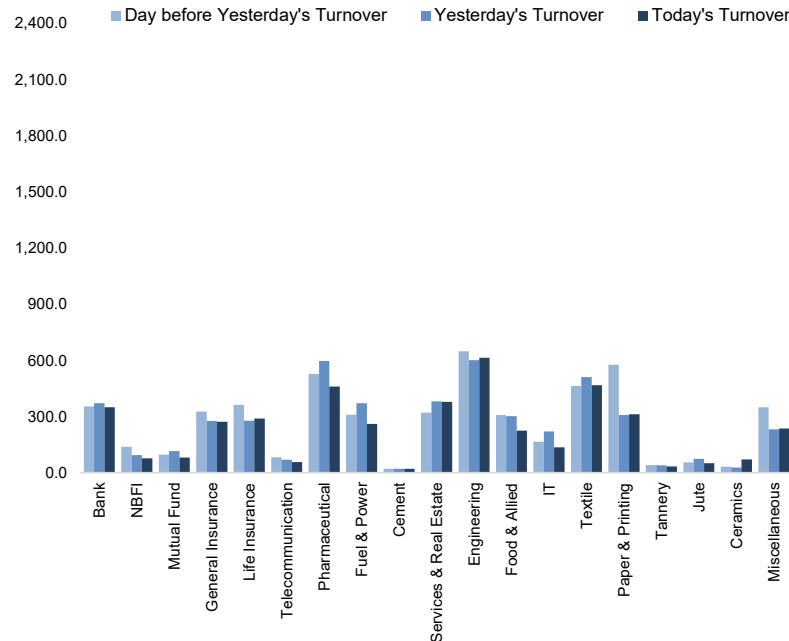
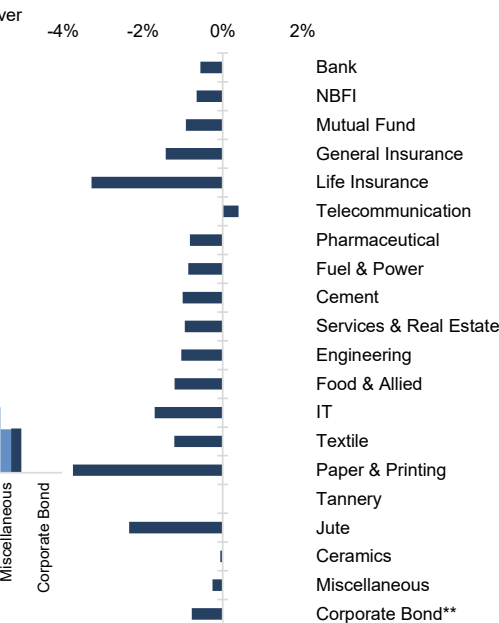


Figure: Sectorial Mcap Change



Market PE 15.1x

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	1,392	1,399	-7.82	-0.56%	36	658,399	9.5%	349.2	8.0%	NM	0.7x	GP	382,540	11.3%	6.9	13.0x	7.7x
NBFI	950	957	-6.22	-0.65%	23	90,575	1.3%	76.6	1.7%	NM	NM	SQURPHARMA	188,371	5.6%	52.1	7.9x	1.3x
Mutual Fund	520	525	-4.83	-0.92%	37	24,930	0.4%	80.9	1.8%	NM	0.5x	ROBI	151,376	4.5%	40.7	16.4x	2.3x
General Insurance	2,852	2,893	-41.25	-1.43%	43	81,391	1.2%	272.4	6.2%	13.5x	1.2x	BRACBANK	135,781	4.0%	48.7	8.6x	1.3x
Life Insurance	1,891	1,955	-64.22	-3.29%	15	50,283	0.7%	288.7	6.6%	NM	NM	BATBC	134,028	4.0%	34.0	11.7x	2.4x
Telecommunication	4,759	4,740	+18.79	+0.40%	3	558,044	8.1%	56.7	1.3%	13.8x	4.2x	WALTONHIL	125,158	3.7%	9.1	12.1x	1.0x
Pharmaceutical	2,916	2,940	-24.20	-0.82%	34	552,848	8.0%	460.5	10.5%	12.4x	1.5x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,064	1,073	-9.28	-0.86%	23	281,827	4.1%	260.7	5.9%	14.8x	0.6x	MARICO	87,280	2.6%	1.4	14.1x	29.3x
Cement	1,933	1,952	-19.59	-1.00%	7	92,114	1.3%	20.6	0.5%	19.7x	2.0x	UPGDCL	74,085	2.2%	2.4	6.2x	1.7x
Services & Real Estate	992	1,001	-9.53	-0.95%	9	54,545	0.8%	378.0	8.6%	19.3x	0.4x	BERGERPBL	69,961	2.1%	2.8	21.9x	4.0x
Engineering	2,327	2,352	-24.39	-1.04%	42	262,542	3.8%	613.7	14.0%	14.3x	0.8x	ISLAMIBANK	59,892	1.8%	4.7	NM	0.8x
Food & Allied	13,297	13,459	-162.54	-1.21%	21	243,295	3.5%	225.3	5.1%	19.4x	3.7x	BXPBARMA	49,162	1.5%	22.8	7.7x	1.0x
IT	1,781	1,812	-30.86	-1.70%	11	23,489	0.3%	135.5	3.1%	25.4x	1.5x	RENATA	48,643	1.4%	7.6	20.5x	1.4x
Textile	1,062	1,075	-13.01	-1.21%	58	110,642	1.6%	467.6	10.6%	75.2x	0.7x	UNILEVERCL	46,245	1.4%	0.0	64.0x	22.3x
Paper & Printing	4,747	4,932	-184.95	-3.75%	6	21,444	0.3%	311.9	7.1%	NM	1.1x	DUTCHBANGL	38,378	1.1%	1.9	7.8x	0.7x
Tannery	1,926	1,926	-0.08	-0.00%	6	22,295	0.3%	33.1	0.8%	NM	1.5x	PUBALIBANK	37,091	1.1%	10.7	6.0x	0.5x
Jute	13,030	13,343	-312.63	-2.34%	3	2,868	0.0%	50.3	1.1%	NM	NM	EBL	36,863	1.1%	3.4	4.7x	0.8x
Ceramics	379	380	-0.22	-0.06%	5	17,019	0.2%	71.2	1.6%	NM	1.1x	CITYBANK	36,509	1.1%	45.1	2.8x	0.6x
Miscellaneous	3,981	3,991	-10.18	-0.25%	15	216,196	3.1%	236.6	5.4%	98.7x	1.7x	ICB	36,078	1.1%	2.3	NM	1.1x
Corporate Bond**	17,157	17,291	-133.61	-0.77%	16	37,879	0.5%	0.2	0.0%	NM	NM	PRIMEBANK	30,988	0.9%	29.5	3.6x	0.7x
Treasury Bond**	2,317	2,326	-8.98	-0.39%	233	3,506,974	50.8%	1.0	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
PREMIERLEA	1.0	+10.0%	0.1	NM	NM	SQURPHARMA	108,958	7.7%	7.9x	1.3x	SAPORTL	46.4	+1.3%	308.3	17.2x	1.3x
ILFSL	1.1	+10.0%	0.0	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.8x	ANWARGALV	101.1	+7.0%	219.3	NM	23.8x
MONNOCERA	84.2	+9.9%	58.3	NM	1.1x	BEXIMCO	69,463	4.9%	NM	1.3x	MONOSPOOL	120.6	-3.1%	168.2	32.1x	2.7x
MONNOFABR	19.1	+9.8%	103.7	NM	0.8x	BATBC	50,233	3.6%	11.7x	2.4x	KBPPWBIL	76.9	-6.0%	140.2	NM	6.4x
FIRSTFIN	2.4	+9.1%	0.2	NM	NM	WALTONHIL	46,773	3.3%	12.1x	1.0x	ORIONINFU	415.5	-8.7%	124.0	NM	26.4x
VFSTDL	11.0	+8.91%	13.4	NM	0.5x	BRACBANK	46,489	3.3%	8.6x	1.3x	MONNOFABR	19.1	+9.8%	103.7	NM	0.8x
MONNOAGML	335.7	+8.7%	18.3	NM	3x	GP	44,708	3.2%	13.0x	7.7x	SIMTEX	31.6	-0.6%	100.2	30.7x	1.4x
ANWARGALV	101.1	+7.0%	219.3	NM	23.8x	RENATA	32,968	2.3%	20.5x	1.4x	PRAGATILIF	216.1	-8.6%	99.3	NM	NM
DBH1STMF	5.8	+5.5%	3.9	NM	0.7x	BXPHARMA	23,409	1.7%	7.7x	1.0x	CVOPRL	185.2	-2.9%	98.3	48.5x	14.1x
KAY&QUE	415.9	+5.3%	96.7	43.8x	4.1x	PUBALIBANK	22,905	1.6%	6.0x	0.5x	KAY&QUE	415.9	+5.3%	96.7	43.8x	4.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	OLYMPIC	ALARABANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD
FARCHEM	15.1	-9.0%	5.8	NM	0.5x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852
ORIONINFU	415.5	-8.7%	124.0	NM	26x	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%
PRAGATILIF	1.3	-7.1%	0.1	NM	0.1x	15.0x	14.4x	38.3x	26.2x	3.6x	16.4x	NM	NM	3.9x
FAMILYTEX	1.3	-7.1%	0.1	NM	0.1x	3.2x	2.3x	0.7x	3.7x	0.7x	2.3x	0.7x	NM	0.5x
BIFC	2.9	-6.5%	0.0	NM	NM									
GEMINISEA	146.2	-6.3%	11.4	NM	11.9x									
KBPPWBIL	76.9	-6.0%	140.2	NM	6.4x									
SONALIPAPR	237.1	-5.5%	76.3	33.1x	1.4x									
NURANI	1.8	-5.3%	0.1	NM	0.2x									
PRIMELIFE	36.1	-5.2%	1.4	NM	NM									

* 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 (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
KBPPWBIL	89.9	83.7	5.0	952	85.56
BANKASIA	17.5	17.5	1.0	630	11.03
BANKASIA	17.5	17.5	1.0	630	11.03
DOMINAGE	22.8	21.0	3.0	388	8.40
ACI	196.0	196.0	1.0	28	5.40
ORIONINFU	485.0	415.5	3.0	11	5.07
ASIATICLAB	63.2	62.7	2.0	46	2.90
CITYGENINS	69.0	69.0	1.0	30	2.07
BEACONPHAR	119.8	111.0	2.0	16	1.81
RUPALILIFE	104.2	97.2	2.0	16	1.55

* 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
KBPPWBIL	89.9	83.7	85.6	952	5
BANKASIA	17.5	17.5	11.0	630	1
BANKASIA	17.5	17.5	11.0	630	1
DOMINAGE	22.8	21.0	8.4	388	3
ACI	196.0	196.0	5.4	28	1
ORIONINFU	485.0	415.5	5.1	11	3
ASIATICLAB	63.2	62.7	2.9	46	2
CITYGENINS	69.0	69.0	2.1	30	1
BEACONPHAR	119.8	111.0	1.8	16	2
RUPALILIFE	104.2	97.2	1.5	16	2
ANWARGALV	96.6	96.6	1.4	15	1
ENVOYTEX	53.0	53.0	0.9	17	1
FINEFOODS	282.7	282.7	0.9	3	1
ITC	43.8	43.8	0.7	17	1
LOVELLO	101.9	101.9	0.7	7	1
AL-HAJTEX	142.0	142.0	0.7	5	1
RAHIMAFOOD	142.0	142.0	0.7	5	1
TILIL	52.2	52.2	0.7	13	1
RANFOUNDRY	154.3	154.3	0.6	4	1
PTL	52.4	52.4	0.6	11	1
CAPMBDBLMF	11.2	11.2	0.6	50	1
SILCOPHL	15.0	15.0	0.5	36	1
Total			145.0		37

Important DSE News

PRIMEBANK

The company has informed that Mr. Mohammed Nader Khan, a sponsor of the company, has completed his sale of 980,442 shares of the company through DSE as per declaration disseminated by DSE on 30.10.2025. On the other hand, the following sponsors and/or directors of the company have completed their buying of shares in the following manner through DSE as per declaration disseminated by DSE on 30.10.2025: 1. Mr. Azam J Chowdhury (director of the company): 97,162 shares; 2. Mr. Tanveer A Chowdhury (director of the company): 95,264 shares; 3. MJL Bangladesh PLC. (corporate director of the company): 190,982 shares; 4. Mr. Md. Shahadat Hossain (a sponsor director of the company): 95,326 shares; 5. Mr. S.M Tamjid (director of the company): 95,280 shares; 6. Mr. Quazi Sirazul Islam (sponsor director of the company): 95,345 shares; 7. Mrs. Nazma Haque (director of the company): 95,631 shares; 8. Mr. Nafis Sikder (director of the company): 119,440 shares, and 9. Uniglory Cycle Industries Limited (corporate director of the company): 96,012 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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