BRAC EPL
STOCK BROKERAGE LTD

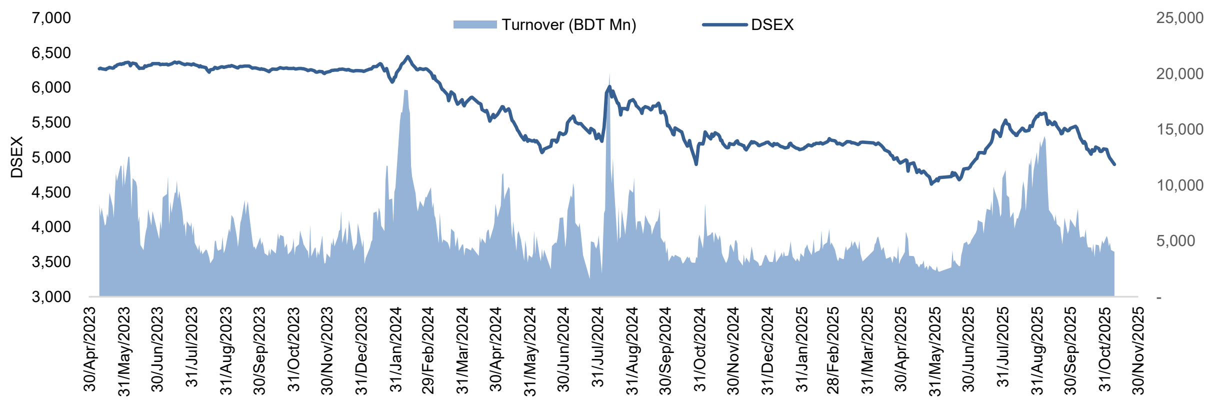
Sunday, November 9, 2025

DSEX Index Closing 4,899.93 ↓ (-68.01, -1.37%)

Daily Market Update

Market closed in red

The market closed in red today. The benchmark index DSEX (-1.37%) lost 68.01 points and closed at 4,899.93. The blue-chip index DS30 (-0.61%), the Shariah-based index DSES (-1.60%), and the large-cap index CDSET (-0.65%) closed at 1,928.80, 1,022.61, and 1,024.23 points, respectively. All the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 3.42% followed by Bank (-1.62%), Engineering (-0.94%), Telecommunication (-0.74%), Pharmaceutical (-0.72%), Fuel & Power (-0.62%), and Food & Allied (-0.52%), respectively. Block trades contributed 2.3% of the overall market turnover. Summit Alliance Port Limited (-3.0%) was the most traded share with a turnover of BDT 270 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,899.93	4,967.94	-68.01	-1.37%	-6.1%
DS30	1,928.80	1,940.62	-11.82	-0.61%	-0.6%
DSES	1,022.61	1,039.21	-16.60	-1.60%	-12.5%
CDSET	1,024.23	1,030.96	-6.73	-0.65%	-3.9%

	Advanced	Declined	Unchanged	Total
All Category	34	329	27	390
A Category (Equity)	25	169	20	214
B Category (Equity)	5	72	2	79
N Category (Equity)	0	0	0	0
Z Category (Equity)	4	88	5	97
Mutual Funds	0	25	10	35
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

** Based on Traded Scrips*

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,855,154	6,909,159	-0.8%
	Mn USD	56,152	56,594	
Turnover	Mn BDT	4,022	4,198	-4.2%
	Mn USD	33	34	
Volume	Mn Shares	133	140	-5.2%
No. of Trade		149,743	151,831	-1.4%

** Average Interbank Exchange Rate is BDT 122.08 as of Nov 09, 2025*

Figure: Sectorial Turnover (BDT Mn)

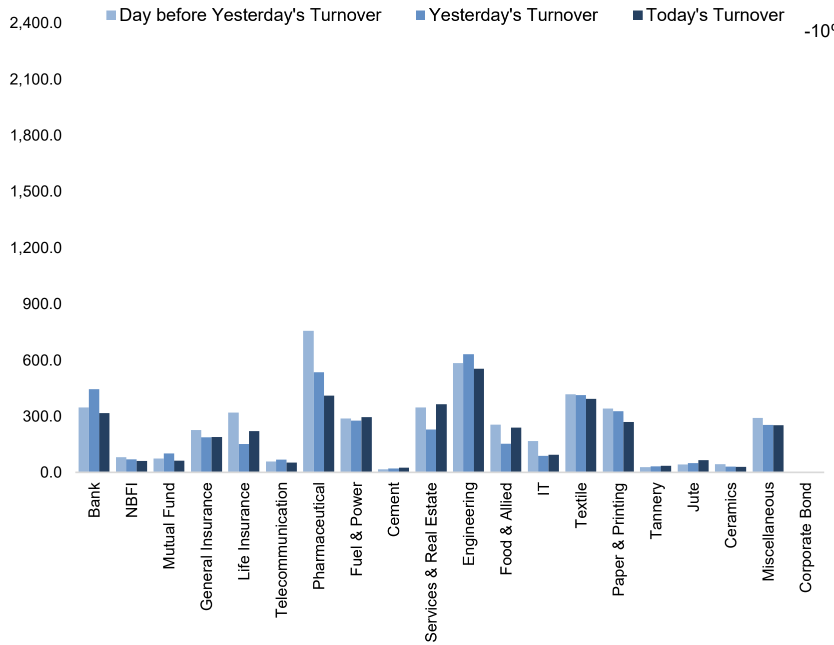
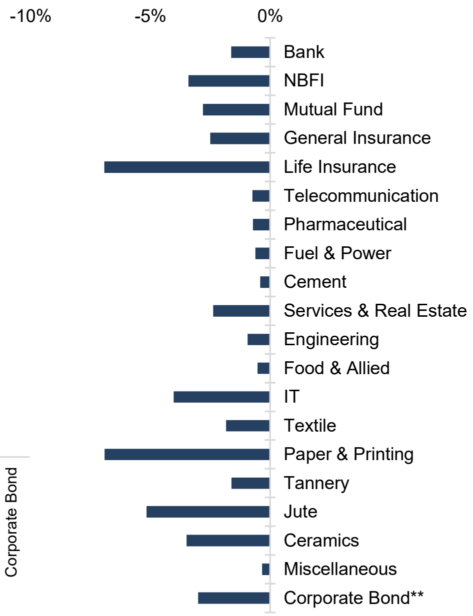


Figure: Sectorial Mcap Change



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Market PE 14.8x
Market PB 1.1x

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

BRAC EPL STOCK BROKERAGE LTD

Daily Market Update

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB
Bank	1,351	1,374	-22.29	-1.62%	36	639,448	9.3%	317.2	8.1%	NM	0.7x
NBFI	887	919	-31.37	-3.42%	23	84,537	1.2%	61.6	1.6%	NM	NM
Mutual Fund	493	507	-14.21	-2.80%	37	23,607	0.3%	62.9	1.6%	NM	0.5x
General Insurance	2,730	2,800	-70.09	-2.50%	43	77,908	1.1%	189.2	4.8%	12.9x	1.1x
Life Insurance	1,739	1,868	-129.36	-6.93%	15	46,241	0.7%	220.5	5.6%	NM	NM
Telecommunication	4,722	4,757	-35.05	-0.74%	3	553,745	8.1%	52.8	1.3%	13.7x	4.1x
Pharmaceutical	2,884	2,905	-20.78	-0.72%	34	546,812	8.0%	409.4	10.4%	12.2x	1.5x
Fuel & Power	1,051	1,058	-6.56	-0.62%	23	278,458	4.1%	294.7	7.5%	14.3x	0.6x
Cement	1,904	1,912	-7.85	-0.41%	7	90,743	1.3%	25.5	0.6%	19.4x	2.0x
Services & Real Estate	967	991	-23.60	-2.38%	9	53,207	0.8%	364.0	9.3%	18.6x	0.4x
Engineering	2,270	2,291	-21.64	-0.94%	42	256,030	3.7%	553.7	14.1%	14.0x	0.8x
Food & Allied	13,160	13,229	-69.19	-0.52%	21	240,793	3.5%	238.7	6.1%	19.1x	3.6x
IT	1,626	1,695	-68.30	-4.03%	11	21,451	0.3%	94.1	2.4%	23.2x	1.3x
Textile	1,017	1,036	-19.11	-1.84%	58	105,949	1.5%	392.3	10.0%	71.8x	0.7x
Paper & Printing	4,388	4,714	-325.97	-6.92%	6	19,824	0.3%	269.5	6.9%	NM	1.0x
Tannery	1,864	1,895	-30.62	-1.62%	6	21,581	0.3%	35.1	0.9%	NM	1.4x
Jute	12,680	13,370	-689.83	-5.16%	3	2,791	0.0%	66.0	1.7%	NM	NM
Ceramics	361	374	-13.05	-3.49%	5	16,173	0.2%	28.9	0.7%	NM	1.0x
Miscellaneous	3,962	3,975	-13.33	-0.34%	15	215,133	3.1%	251.3	6.4%	98.2x	1.7x
Corporate Bond**	16,530	17,042	-512.04	-3.00%	16	36,494	0.5%	0.6	0.0%	NM	NM
Treasury Bond**	2,331	2,337	-6.78	-0.29%	233	3,528,440	51.4%	0.5	0.0%	NM	NM

Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
GP	379,569	11.5%	5.0	12.9x	7.7x
SQURPHARMA	188,637	5.7%	58.7	7.9x	1.3x
ROBI	150,329	4.5%	37.5	16.3x	2.2x
BATBC	133,704	4.0%	13.0	11.6x	2.4x
BRACBANK	132,795	4.0%	25.2	8.5x	1.3x
WALTONHIL	121,526	3.7%	11.5	11.7x	1.0x
BEXIMCO	103,850	3.1%	0.0	NM	1.3x
MARICO	86,783	2.6%	2.5	14.0x	29.1x
UPGDCL	72,578	2.2%	2.7	6.1x	1.7x
BERGERPBL	69,554	2.1%	1.9	21.8x	4.0x
ISLAMIBANK	58,765	1.8%	3.8	NM	0.8x
BXPHARMA	49,563	1.5%	16.5	7.7x	1.0x
RENATA	46,670	1.4%	7.1	19.7x	1.3x
UNILEVERCL	45,780	1.4%	1.0	63.3x	22.1x
DUTCHBANGL	37,508	1.1%	4.6	7.6x	0.7x
EBL	36,863	1.1%	4.4	4.7x	0.8x
PUBALIBANK	36,570	1.1%	3.2	5.9x	0.5x
CITYBANK	36,509	1.1%	64.5	2.8x	0.6x
ICB	32,782	1.0%	1.8	NM	1.0x
PRIMEBANK	30,640	0.9%	3.2	3.5x	0.7x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
IFADAUTOS	20.0	+6.4%	10.8	NM	0.6x
POWERGRID	28.2	+4.8%	4.6	NM	0.2x
ORIONINFU	374.9	+4.5%	100.7	NM	23.9x
FEDERALINS	19.8	+4.2%	0.5	19.4x	1.5x
RUNNERAUTO	35.6	+4.1%	76.1	39.6x	0.5x
SAIHAMCOT	18.0	+4.05%	88.9	18.2x	0.5x
MEGHNAPET	22.1	+3.3%	0.1	NM	0x
SPCL	47.4	+3.3%	69.7	18.7x	1.2x
SHAHJABANK	16.9	+1.8%	5.3	12.4x	0.7x
APEXSPINN	132.2	+1.7%	9.1	39.5x	1.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FAREASTFIN	0.8	-10.6%	0.2	NM	NM
PLFSL	0.7	-10.1%	0.3	NM	NM
WATACHEM	3.6	-10.0%	4.2	NM	0.4x
MBL1STMF	3.6	-10.0%	4.2	NM	0.4x
PREMIERLEA	0.9	-10.0%	0.0	NM	NM
SHURWID	3.6	-10.0%	0.4	NM	0.3x
ILFSL	0.8	-10.0%	0.3	NM	NM
GSPFINANCE	1.8	-10.0%	0.6	NM	NM
FASFIN	0.8	-10.0%	0.1	NM	NM
OAL	4.5	-10.0%	1.5	NM	0.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	7.9x	1.3x
ISLAMIBANK	74,730	5.3%	NM	0.8x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	11.6x	2.4x
WALTONHIL	46,773	3.3%	11.7x	1.0x
BRACBANK	46,489	3.3%	8.5x	1.3x
GP	44,708	3.2%	12.9x	7.7x
RENATA	32,968	2.3%	19.7x	1.3x
BXPHARMA	23,409	1.7%	7.7x	1.0x
PUBALIBANK	22,905	1.6%	5.9x	0.5x
CITYBANK	21,020	1.5%	2.8x	0.6x
LHB	20,953	1.5%	15.0x	3.2x
OLYMPIC	20,496	1.5%	14.0x	2.3x
ALARABANK	18,282	1.3%	31.8x	0.6x
BEACONPHAR	17,838	1.3%	26.5x	3.8x
PRIMEBANK	16,142	1.1%	3.5x	0.7x
ROBI	14,876	1.1%	16.3x	2.2x
UTTARABANK	13,699	1.0%	NM	0.7x
NBL	13,055	0.9%	NM	NM
BSRMLTD	12,852	0.9%	4.0x	0.5x

* 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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAPORTL	46.0	-3.0%	270.0	16.1x	1.3x
ANWARGALV	102.1	-10.0%	159.8	NM	24.1x
MONOSPOOL	118.3	-9.7%	130.4	31.5x	2.6x
BSC	110.4	+0.5%	104.8	5.6x	1.1x
ORIONINFU	374.9	+4.5%	100.7	NM	23.9x
SAIHAMCOT	18.0	+4.0%	88.9	18.2x	0.5x
KBPPWBIL	69.0	-4.3%	84.9	NM	5.7x
RUNNERAUTO	35.6	+4.1%	76.1	39.6x	0.5x
CVOPRL	160.4	-9.2%	75.8	33.6x	5.0x
SPCL	47.4	+3.3%	69.7	18.7x	1.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DOMINAGE	22.0	21.0	4.0	1,089	23.67
FINEFOODS	290.0	290.0	2.0	38	11.02
FINEFOODS	290.0	290.0	2.0	38	11.02
ACMEPL	16.5	16.5	1.0	530	8.75
MALEKSPIN	26.4	26.4	1.0	200	5.28
ACI	185.5	185.5	1.0	24	4.55
ASIATICLAB	60.0	60.0	1.0	64	3.87
MONNOCERA	79.8	75.0	2.0	30	2.30
REPUBLIC	29.8	29.8	1.0	60	1.79
BEACONPHAR	112.5	112.5	1.0	15	1.63

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DOMINAGE	22.0	21.0	23.7	1,089	4
FINEFOODS	290.0	290.0	11.0	38	2
FINEFOODS	290.0	290.0	11.0	38	2
ACMEPL	16.5	16.5	8.7	530	1
MALEKSPIN	26.4	26.4	5.3	200	1
ACI	185.5	185.5	4.5	24	1
ASIATICLAB	60.0	60.0	3.9	64	1
MONNOCERA	79.8	75.0	2.3	30	2
REPUBLIC	29.8	29.8	1.8	60	1
BEACONPHAR	112.5	112.5	1.6	15	1
MIDLANDBNK	21.5	21.5	1.1	50	1
CONTININS	26.8	26.8	1.1	40	1
RAHIMAFOOD	125.0	125.0	1.1	9	1
BEXIMCO	112.9	100.0	1.0	10	2
KAY&QUE	415.0	415.0	0.8	2	1
ENVOYTEX	50.5	50.5	0.7	14	1
IPDC	21.4	21.4	0.7	32	1
BBSCABLES	13.5	13.5	0.7	50	1
NFML	16.0	16.0	0.6	40	1
LEGACYFOOT	49.9	49.9	0.6	13	1
IBNSINA	310.5	310.5	0.6	2	1
CVOPRL	185.0	185.0	0.6	3	1
Total			**93.8**		**35**

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ZEALBANGLA		0.0%	0.0%	Record Date	13-Nov-25

Important DSE News

EXIMBANK

The company has informed that Bangladesh Bank, vide its letter dated 5 November 2025, has appointed Mr. Md. Sawkatul Alam, Executive Director of Bangladesh Bank as the Administrator of the company.

SAPORTL

The Board of Directors has recommended 18% Cash Dividend for the year ended June 30, 2025. Date of AGM: 23.12.2025, Time: 11:30 AM, Venue: Digital Platform. Record Date: 27.11.2025. The Company has also reported Consolidated EPS of Tk. 2.85, Consolidated NAV per share of Tk. 35.67 and Consolidated NOCFPS of Tk. 3.84 for the year ended June 30, 2025 as against Tk. 1.75, Tk. 33.71 and Tk. 2.45 respectively for the year ended June 30, 2024.

WATACHEM

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2025. Date of AGM: 24.12.2025; Time: Will be published later on. Venue/Mode of AGM: Digital Platform. Record Date: 27.11.2025. The Company has also reported EPS of Tk. 0.74, NAV per share of Tk. 61.09 and NOCFPS of Tk. 19.93 for the year ended June 30, 2025 as against Tk. 0.67, Tk. 61.60 and Tk. 16.83 respectively for the year ended June 30, 2024.

PHARMAID

The Board of Directors has recommended a 30% Cash Dividend for the year ended June 30, 2025. Date of AGM: 24.12.2025, Time: 11:30 AM, Venue: Digital Platform. Record Date: 07.12.2025. The Company has also reported an EPS of Tk. 20.45, NAV per share of Tk. 138.58, and NOCFPS of Tk. 12.74 for the year ended June 30, 2025, as against an EPS of Tk. 19.61, NAV per share of Tk. 109.89, and NOCFPS of Tk. 7.30 for the year ended June 30, 2024.

SONALIANSH

The company has informed that Mr. Md. Shifat Hossain Khan has been appointed as the Company Secretary of the company with effect from November 01, 2025.

NTLTUBES

The Board of Directors has recommended 1% Cash Dividend for the year ended June 30, 2025. Date of AGM: 20.12.2025; Time: 11:00 AM; Venue/Mode of AGM: National Tubes Limited, 131-142 Tongi Industrial Area, Gazipur-1710. Record Date: 26.11.2025. The Company has also reported EPS of Tk. 1.72, NAV per share of Tk. 137.61 and NOCFPS of Tk. 2.15 for the year ended June 30, 2025 as against Tk. 2.00, Tk. 136.28 and Tk. (3.68) respectively for the year ended June 30, 2024.

MATINSPINN

(Q1 Un-audited): EPS was Tk. 1.09 for July-September 2025 as against Tk. 1.03 for July-September 2024; NOCFPS was Tk. 7.39 for July-September 2025 as against Tk. 4.79 for July-September 2024. NAV per share (with revaluation reserves) was Tk. 70.73 as on September 30, 2025 and Tk. 69.89 as on June 30, 2025.

FINEFOODS

(Q1 Un-audited): EPS was Tk. 2.57 for July-September 2025 as against Tk. 0.62 for July-September 2024; NOCFPS was Tk. 1.61 for July-September 2025 as against Tk. 0.19 for July-September 2024. NAV per share was Tk. 17.22 as on September 30, 2025 and Tk. 11.93 as on September 30, 2024.

HAKKANIPUL

(Q1 Un-audited): EPS was Tk. 0.05 for July-September 2025 as against Tk. 0.03 for July-September 2024; NOCFPS was Tk. 1.91 for July-September 2025 as against Tk. 3.31 for July-September 2024. NAV per share (with revaluation) was Tk. 24.34 as on September 30, 2025 and Tk. 24.24 as on June 30, 2025. NAV per share (without revaluation) was Tk. 12.11 as on September 30, 2025 and Tk. 11.92 as on June 30, 2025.

ILFSL

(Q3 Un-audited): Consolidated EPS was Tk. (0.62) for July-September 2025 as against Tk. (1.05) for July-September 2024; Consolidated EPS was Tk. (6.71) for January-September 2025 as against Tk. (2.86) for January-September 2024. Consolidated NOCFPS was Tk. (2.27) for January-September 2025 as against Tk. (4.15) for January-September 2024. Consolidated NAV per share was Tk. (219.03) as on September 30, 2025 and Tk. (212.32) as on December 31, 2024.

BXPHARMA

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Beximco Pharmaceuticals PLC.' instead of 'Beximco Pharmaceuticals Limited' with effect from November 10, 2025. Other information (except name) will remain unchanged.

BDTHAIFOOD

BD Thai Cosmo Ltd. (where Prof. Rubina Hamid, Dr. Kazi Aktar Hamid and Mr. Ryan Hamid are Directors of the company as well as Sponsor Directors of BD Thai Food & Beverage Limited), has expressed its intention to sell 1,50,000 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC.