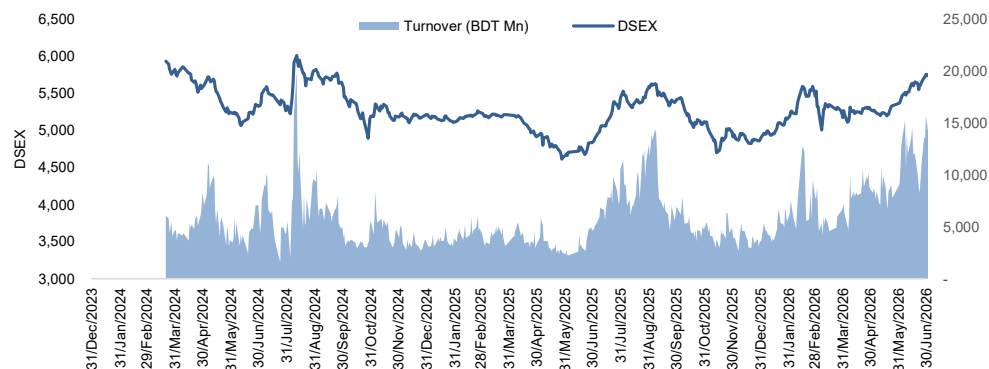


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.34%) lost 18.79 points and closed at 5,531.65. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.20%), and the large-cap index CDSET (-0.21%) closed at 2,103.55, 1,100.26, and 1,103.26 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.20% followed by Food & Allied (-0.44%), Fuel & Power (-0.32%), Pharmaceutical (-0.26%), Engineering (-0.15%), Bank (-0.14%), and Telecommunication (+0.01%), respectively. Block trades contributed 8.4% of the overall market turnover. IPDC Finance PLC. (-6.5%) was the most traded share with a turnover of BDT 510 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,531.65	5,550.44	-18.79	-0.34%	+13.7%
DS30	2,103.55	2,108.45	-4.90	-0.23%	+13.5%
DSES	1,100.26	1,102.49	-2.24	-0.20%	+9.9%
CDSET	1,103.26	1,105.61	-2.35	-0.21%	+9.8%

	Advanced	Declined	Unchanged	Total
All Category	85	242	58	385
A Category (Equity)	32	141	21	194
B Category (Equity)	20	49	4	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	33	52	33	118
Mutual Funds	1	23	9	33
Corporate Bonds	0	1	0	1
Treasury Bonds	1	1	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,859,358	6,874,766	
	Mn USD	55,692	55,817	-0.2%
Turnover	Mn BDT	7,231	6,991	+3.4%
	Mn USD	59	57	
Volume	Mn Shares	230	205	+12.2%
No. of Trade		184,783	176,960	+4.4%

* Average Interbank Exchange Rate is BDT 123.17 as of Oct 01, 2026

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Figure: Sectorial Turnover (BDT Mn)

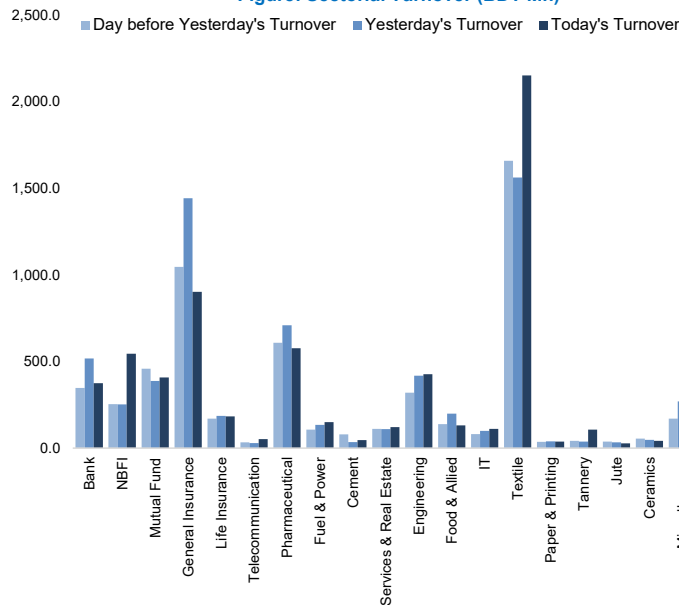
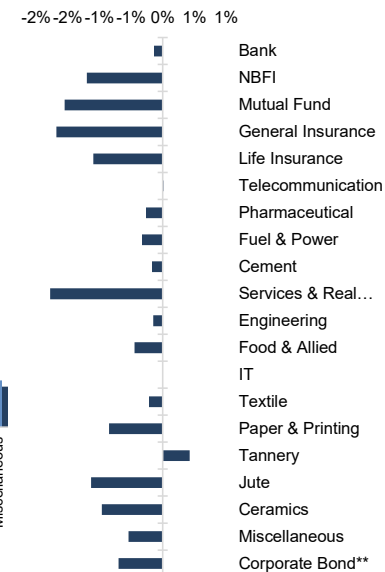


Figure: Sectorial Mcap Change



Market PE 13.0x
Market PB 1.6x

* Market P/E and P/BV calculation excludes
Mutual Fund, Life Insurance, selected 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	1,545	1,548	-2.14	-0.14%	36	736,575	10.7%	375.3	5.7%	7.2x	0.7x	GP	325,557	9.3%	14.0	9.2x	5.8x
NBFI	1,063	1,076	-12.91	-1.20%	23	101,128	1.5%	545.1	8.2%	NM	1.1x	SQURPHARMA	193,512	5.6%	60.8	7.5x	1.3x
Mutual Fund	679	689	-10.69	-1.55%	34	31,584	0.5%	407.5	6.1%	NM	0.6x	ROBI	157,662	4.5%	34.8	15.1x	2.4x
General Insurance	4,548	4,625	-77.68	-1.68%	43	128,483	1.9%	902.1	13.6%	18.9x	1.8x	BRACBANK	150,424	4.3%	107.2	6.6x	1.3x
Life Insurance	1,707	1,726	-18.92	-1.10%	15	48,112	0.7%	183.3	2.8%	NM	NM	WALTONHIL	123,415	3.5%	13.8	11.0x	1.0x
Telecommunication	4,398	4,398	+0.47	+0.01%	3	510,340	7.4%	51.5	0.8%	10.5x	3.6x	BATBC	120,582	3.5%	12.6	20.7x	2.1x
Pharmaceutical	3,084	3,092	-8.17	-0.26%	34	582,190	8.5%	575.7	8.7%	10.6x	1.5x	MARICO	83,828	2.4%	7.7	7.5x	18.2x
Fuel & Power	1,092	1,095	-3.56	-0.32%	23	288,231	4.2%	150.0	2.3%	9.3x	0.6x	BERGERPBL	71,837	2.1%	1.5	15.4x	3.3x
Cement	1,959	1,962	-3.33	-0.17%	7	92,167	1.3%	45.8	0.7%	21.4x	2.1x	UPGDCL	65,911	1.9%	2.1	7.1x	1.4x
Services & Real Estate	1,133	1,153	-20.48	-1.78%	9	61,626	0.9%	121.9	1.8%	25.1x	0.5x	BXPHARMA	65,668	1.9%	57.7	7.6x	1.1x
Engineering	2,520	2,523	-3.77	-0.15%	42	282,416	4.1%	426.6	6.4%	14.9x	0.8x	PUBALIBANK	59,658	1.7%	8.0	5.0x	0.8x
Food & Allied	12,137	12,191	-54.14	-0.44%	21	221,564	3.2%	131.2	2.0%	32.4x	3.3x	CITYBANK	52,307	1.5%	34.6	3.4x	0.8x
IT	2,339	2,339	+0.05	+0.00%	11	30,973	0.5%	110.7	1.7%	50.4x	1.9x	RENATA	51,464	1.5%	6.7	18.9x	1.4x
Textile	1,410	1,413	-3.08	-0.22%	58	146,673	2.1%	2,150.4	32.4%	NM	1.0x	DUTCHBANGL	46,489	1.3%	7.0	3.6x	0.7x
Paper & Printing	4,406	4,444	-37.70	-0.85%	6	20,638	0.3%	38.3	0.6%	NM	1.4x	ISLAMIBANK	42,987	1.2%	0.7	NM	0.7x
Tannery	2,069	2,060	+8.79	+0.43%	6	24,030	0.4%	107.0	1.6%	NM	1.5x	UNILEVERCL	38,053	1.1%	0.2	62.2x	23.3x
Jute	13,418	13,571	-153.47	-1.13%	3	2,927	0.0%	28.0	0.4%	NM	1.8x	EBL	37,805	1.1%	72.0	4.2x	0.7x
Ceramics	441	445	-4.28	-0.96%	5	19,914	0.3%	42.0	0.6%	NM	1.3x	PRIMEBANK	34,487	1.0%	9.9	3.7x	0.7x
Miscellaneous	2,452	2,466	-13.28	-0.54%	15	133,170	1.9%	233.8	3.5%	37.6x	1.0x	POWERGRID	34,359	1.0%	4.0	8.5x	0.3x
Corporate Bond**	18,227	18,355	-127.91	-0.70%	16	40,326	0.6%	0.5	0.0%	NM	NM	ICB	33,216	1.0%	1.4	NM	1.2x
Treasury Bond**	2,188	2,190	-2.08	-0.10%	232	3,360,178	49.0%	0.8	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
TUNGHA	4.6	+9.5%	17.0	NM	NM	SQURPHARMA	108,077	7.3%	7.5x	1.3x	IPDC	33.1	-6.5%	509.9	27.8x	1.9x
DOMINAGE	66.1	+7.7%	149.9	NM	3.9x	BRACBANK	80,973	5.5%	6.6x	1.3x	MALEKSPIN	50.0	+2.2%	462.9	8.8x	0.8x
SAMATALETH	96.6	+7.3%	44.8	NM	6.7x	BXPHARMA	45,882	3.1%	7.6x	1.1x	PTL	81.9	-4.4%	252.3	12.9x	1.7x
PLFSL	1.8	+5.9%	3.4	NM	NM	ISLAMIBANK	42,909	2.9%	NM	0.7x	SAIHAMTEX	42.5	+4.9%	214.2	68.5x	1.0x
BDAUTOCA	189.9	+5.9%	21.2	NM	25.7x	PUBALIBANK	40,645	2.8%	5.0x	0.8x	SHARPIND	18.2	-5.2%	158.2	NM	2.3x
ARGONDENIM	22.6	+5.61%	113.9	19.7x	0.9x	WALTONHIL	40,616	2.8%	11.0x	1.0x	DOMINAGE	66.1	+7.7%	149.9	NM	3.9x
PREMIERLEA	2.0	+5.3%	1.0	NM	NM	CITYBANK	36,422	2.5%	3.4x	0.8x	SAIHAMCOT	23.9	+0.8%	145.4	26.3x	0.6x
SAIHAMTEX	42.5	+4.9%	214.2	68.5x	1.0x	GP	32,556	2.2%	9.2x	5.8x	ETL	15.9	+0.6%	130.7	24.8x	1.2x
APEXTANRY	95.0	+4.9%	19.7	NM	0.4x	BATBC	31,894	2.2%	20.7x	2.1x	ENVOYTEX	72.8	+0.8%	120.3	8.8x	1.2x
FAMILYTEX	2.3	+4.5%	1.0	NM	0.2x	EBL	25,919	1.8%	4.2x	0.7x	ARGONDENIM	22.6	+5.6%	113.9	19.7x	0.9x
						RENATA	25,068	1.7%	18.9x	1.4x						
						LHB	22,322	1.5%	12.4x	3.3x						
						PRIMEBANK	21,544	1.5%	3.7x	0.7x						
						UCB	17,991	1.2%	3.8x	0.5x						
						OLYMPIC	17,816	1.2%	15.0x	2.1x						
						UTTARABANK	17,441	1.2%	NM	0.8x						
						ROBI	15,766	1.1%	15.1x	2.4x						
						ALARABANK	14,958	1.0%	19.6x	0.7x						
						BSRMLTD	14,858	1.0%	4.3x	0.5x						
						BEACONPHAR	14,254	1.0%	16.3x	3.1x						
	</															

* 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
SAIHAMTEX	41.8	37.0	185.4	4,685	31
SQURPHARMA	218.3	218.2	128.7	590	2
BXPHARMA	153.3	147.5	114.9	769	4
GREENDELT	66.4	66.4	46.5	700	2
IPDC	35.0	34.0	36.8	1,080	2
BNICL	185.6	185.6	35.0	189	1
TAKAFULINS	58.0	58.0	7.0	120	1
ENVOYTEX	73.0	73.0	6.9	94	1
KARNAPHULI	52.3	52.3	5.8	110	1
CITYGENINS	131.3	130.0	4.7	36	2
DAFODILCOM	156.8	156.2	4.1	26	3
IFIC	4.9	4.9	3.9	800	1
BDAUTOCA	187.0	186.0	3.7	20	4
PTL	94.2	85.5	3.1	34	4
MARICO	2,670.0	2,670.0	2.7	1	1
RENATA	451.0	451.0	2.3	5	1
NITOLINS	58.5	58.5	1.3	22	1
KBPPWBIL	40.8	40.8	1.0	25	1
ONEBANKPLC	7.5	7.5	1.0	133	1
LINDEBD	667.0	667.0	1.0	1	1
DOMINAGE	63.3	63.3	0.9	14	1
SAMATALETH	92.7	92.7	0.8	9	1
Total			603.9		78

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GPHISPAT		0.0%	2.0%	Record Date	1-Oct-26
AAMRATECH		0.0%	0.3%	Record Date	6-Oct-26
APEXFOOT		15.0%	15.0%	Record Date	15-Oct-26
BANGAS		0.0%	3.0%	Record Date	19-Oct-26
ENVOYTEX		0.0%	32.5%	Record Date	26-Oct-26
IBNSINA		0.0%	77.0%	Record Date	26-Oct-26

Important DSE News

IBNSINA

The Board of Directors has recommended 77% Cash Dividend for the year ended June 30, 2026. Date of AGM: 23.11.2026, Time: 09:30 AM, Venue/Mode: Digital Platform. Record Date: 26.10.2026. The Company has also reported Consolidated EPS of Tk. 25.43, Consolidated NAV per share of Tk. 144.56 and Consolidated NOCFPS of Tk. 37.95 for the year ended June 30, 2026 as against Tk. 20.27, Tk. 125.69 and Tk. 23.16 respectively for the year ended June 30, 2025.

The company has informed that it has decided to purchase Commercial Space measuring area of 24,321 sft. located at Concord Lily Height's Plot: 08, Road: 16 (Old 27), Dhanmondi R/A, Dhaka 1209, Bangladesh at the cost of Tk. 57,43,01,158 (Taka Fifty Seven Crore Forty Three Lac One Thousand and One Hundred Fifty Eight) only (excluding registration fee and other relevant charges) and approved by the Board of Directors of the company in its 342nd meeting held on September 30, 2026.

MTB

The company has informed that the Board of Directors in its 338th meeting held on September 30, 2026 approved the Interim Audited Financial Statements for the first six month (H1) ended on June 30, 2026, in connection with the requirement for issuance of the Subordinated Bond of BDT 5.00 billion. The said Interim Financial Statements were previously disclosed as unaudited in the PSI published by DSE on July 30, 2026. A summary of the Audited Financial Highlights for the first half of 2026 is presented below: Consolidated EPS was Tk. 0.99 for January-June 2026 as against Tk. 1.07 (restated) for January-June 2025. Consolidated NOCFPS was Tk. 54.77 for January-June 2026 as against Tk. 4.72 (restated) for January-June 2025. Consolidated NAV per share was Tk. 28.16 as on June 30, 2026 and Tk. 28.11 (restated) as on December 31, 2025.

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