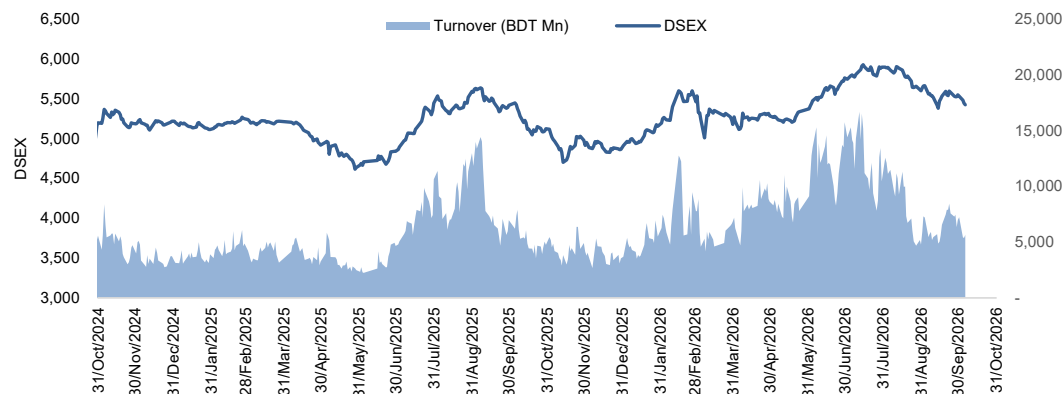


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.37%) lost 20.37 points and closed at 5,424.91. The blue-chip index DS30 (-0.22%), the Shariah-based index DSES (-0.46%), and the large-cap index CDSET (-0.22%) closed at 2,077.09, 1,074.85, and 1,091.29 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.43% followed by Pharmaceutical (-0.57%), Fuel & Power (-0.23%), Engineering (-0.21%), Telecommunication (-0.12%), Food & Allied (-0.08%), and Bank (-0.01%), respectively. Block trades contributed 11.3% of the overall market turnover. Paramount Textile Limited (+2.6%) was the most traded share with a turnover of BDT 263 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,424.91	5,445.28	-20.37	-0.37%	+11.5%
DS30	2,077.09	2,081.75	-4.66	-0.22%	+12.1%
DSES	1,074.85	1,079.80	-4.95	-0.46%	+7.4%
CDSET	1,091.29	1,093.71	-2.42	-0.22%	+8.6%

	Advanced	Declined	Unchanged	Total
All Category	79	270	41	390
A Category (Equity)	44	140	15	199
B Category (Equity)	18	53	3	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	17	77	23	117
Mutual Funds	0	29	2	31
Corporate Bonds	1	0	1	2
Treasury Bonds	2	6	0	8

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,761,691	6,772,520	-0.2%
	Mn USD	54,963	55,051	
Turnover	Mn BDT	5,642	5,371	+5.0%
	Mn USD	46	44	
Volume	Mn Shares	181	181	-0.1%
No. of Trade		172,178	172,753	-0.3%

* Average Interbank Exchange Rate is BDT 123.02 as of Oct 06, 2026

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Figure: Sectorial Turnover (BDT Mn)

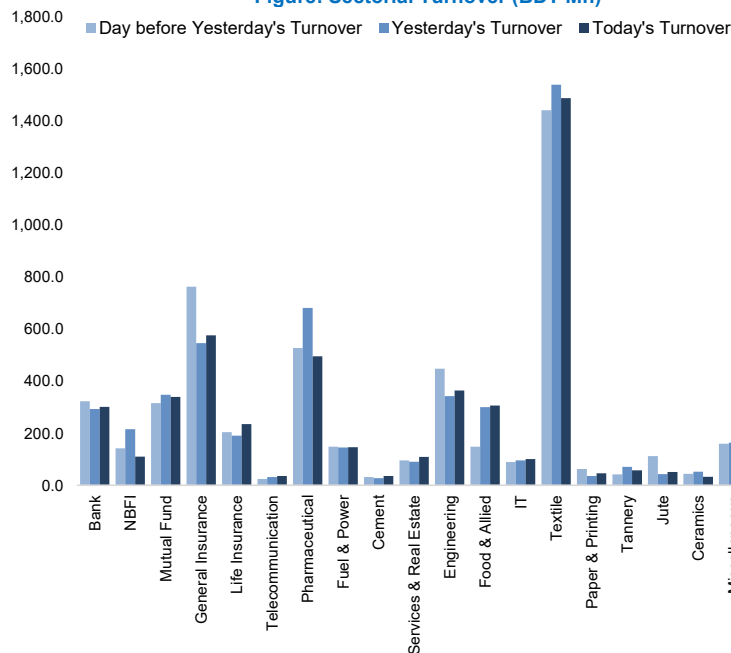
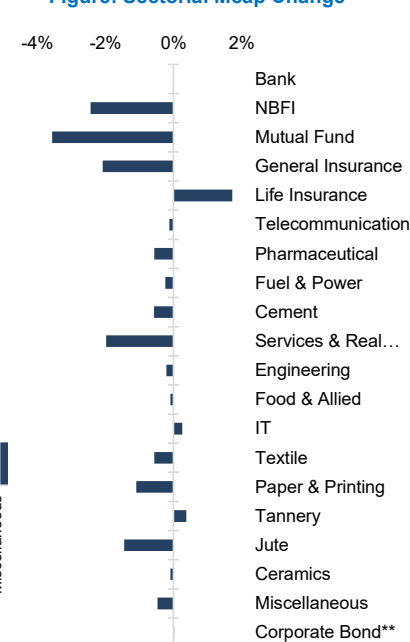


Figure: Sectorial Mcap Change



Market PE 12.8x

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	1,532	1,532	-0.09	-0.01%	36	730,129	10.8%	301.0	6.0%	7.2x	0.7x	GP	324,342	9.5%	10.5	9.2x	5.8x
NBFI	1,050	1,077	-26.17	-2.43%	23	99,884	1.5%	109.8	2.2%	NM	1.1x	SQURPHARMA	192,360	5.6%	45.8	7.4x	1.3x
Mutual Fund	639	663	-23.65	-3.57%	34	29,762	0.4%	340.1	6.8%	NM	0.6x	ROBI	156,614	4.6%	22.1	15.0x	2.4x
General Insurance	4,290	4,381	-90.93	-2.08%	43	121,219	1.8%	576.0	11.5%	17.9x	1.7x	BRACBANK	149,738	4.4%	65.2	6.6x	1.3x
Life Insurance	1,719	1,690	+29.18	+1.73%	15	48,455	0.7%	235.2	4.7%	NM	NM	WALTONHIL	121,362	3.5%	9.5	10.8x	1.0x
Telecommunication	4,373	4,378	-5.16	-0.12%	3	507,441	7.5%	35.5	0.7%	10.5x	3.6x	BATBC	118,800	3.5%	9.0	20.4x	2.1x
Pharmaceutical	3,026	3,043	-17.23	-0.57%	34	571,183	8.4%	495.5	9.9%	10.4x	1.4x	MARICO	83,582	2.4%	2.4	7.4x	18.2x
Fuel & Power	1,077	1,080	-2.54	-0.23%	23	284,437	4.2%	146.3	2.9%	9.2x	0.6x	BERGERPBL	71,189	2.1%	2.0	15.2x	3.3x
Cement	1,930	1,941	-11.14	-0.57%	7	90,810	1.3%	35.8	0.7%	21.1x	2.0x	UPGDCL	65,448	1.9%	1.5	7.0x	1.4x
Services & Real Estate	1,087	1,109	-21.90	-1.97%	9	59,163	0.9%	108.6	2.2%	26.4x	0.4x	BXPHARMA	62,277	1.8%	72.2	7.2x	1.0x
Engineering	2,473	2,478	-5.12	-0.21%	42	277,203	4.1%	364.6	7.3%	14.6x	0.8x	LHB	60,508	1.8%	19.0	12.3x	3.3x
Food & Allied	12,033	12,043	-10.20	-0.08%	21	219,673	3.2%	306.1	6.1%	32.0x	3.2x	CITYBANK	51,957	1.5%	23.1	3.4x	0.8x
IT	2,232	2,226	+5.82	+0.26%	11	29,559	0.4%	100.8	2.0%	48.1x	1.8x	RENATA	50,822	1.5%	3.3	18.6x	1.4x
Textile	1,375	1,383	-7.74	-0.56%	58	143,043	2.1%	1,488.5	29.7%	NM	1.0x	DUTCHBANGL	45,981	1.3%	10.5	3.5x	0.7x
Paper & Printing	4,287	4,335	-47.44	-1.09%	6	20,080	0.3%	46.1	0.9%	NM	1.3x	ISLAMIBANK	41,538	1.2%	1.7	NM	0.7x
Tannery	2,039	2,031	+7.67	+0.38%	6	23,678	0.3%	57.1	1.1%	NM	1.5x	UNILEVERCL	38,109	1.1%	0.4	62.3x	23.4x
Jute	13,569	13,769	-199.50	-1.45%	3	2,960	0.0%	51.6	1.0%	NM	1.8x	EBL	37,312	1.1%	19.0	4.1x	0.7x
Ceramics	416	416	-0.37	-0.09%	5	18,790	0.3%	32.9	0.7%	NM	1.2x	ICB	34,690	1.0%	6.5	NM	1.3x
Miscellaneous	2,396	2,407	-11.19	-0.46%	15	130,090	1.9%	164.5	3.3%	36.8x	1.0x	PRIMEBANK	34,121	1.0%	14.5	3.7x	0.7x
Corporate Bond**	18,423	18,419	+4.07	+0.02%	16	40,760	0.6%	1.2	0.0%	NM	NM	POWERGRID	33,445	1.0%	2.8	8.3x	0.2x
Treasury Bond**	2,160	2,158	+2.11	+0.10%	232	3,317,621	49.0%	7.8	0.2%	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
ECABLES	127.6	+10.0%	6.6	NM	0.4x	SQURPHARMA	107,433	7.5%	7.4x	1.3x	PTL	84.4	+2.6%	262.7	13.3x	1.8x
ISNLTD	53.3	+9.9%	23.5	NM	24.9x	BRACBANK	80,604	5.6%	6.6x	1.3x	SAIHAMTEX	43.3	+0.5%	262.3	69.8x	1.0x
ORIONINFU	251.4	+8.7%	52.5	NM	15.5x	BXPHARMA	43,513	3.0%	7.2x	1.0x	ENVOYTEX	72.0	+0.7%	137.1	8.7x	1.2x
SONALILIFE	102.4	+5.6%	96.9	NM	NM	PUBALIBANK	41,709	2.9%	5.1x	0.8x	APEXFOODS	328.1	+5.3%	131.5	23.1x	1.4x
APEXFOODS	328.1	+5.3%	131.5	23.1x	1.4x	ISLAMIBANK	41,463	2.9%	NM	0.7x	MALEKSPIN	48.7	+1.2%	111.2	8.6x	0.8x
LOVELLO	50.0	+4.82%	63.8	16.4x	3.7x	CITYBANK	36,178	2.5%	3.4x	0.8x	SONALILIFE	102.4	+5.6%	96.9	NM	NM
SAMATALETH	100.9	+4.7%	28.6	NM	7x	WALTONHIL	35,086	2.4%	10.8x	1.0x	ETL	14.7	-2.0%	95.3	23.0x	1.1x
CLICL	48.5	+4.1%	20.3	NM	NM	GP	32,434	2.3%	9.2x	5.8x	SHARPIND	16.8	-3.4%	88.9	NM	2.1x
SUNLIFEINS	61.9	+3.7%	58.4	NM	NM	BATBC	31,423	2.2%	20.4x	2.1x	SIPLC	139.2	-2.0%	84.2	27.3x	4.6x
NURANI	2.9	+3.6%	0.5	NM	0.3x	EBL	26,327	1.8%	4.1x	0.7x	ACMEPL	25.4	-1.6%	81.5	NM	1.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	24,755	1.7%	18.6x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
1STPRIMFMF	27.6	-9.8%	74.7	NM	2.8x	LHB	22,594	1.6%	12.3x	3.3x	BRACBANK	65.1	64.9	3.0	1,953	127.14
BDWELDING	10.2	-9.7%	1.7	NM	1x	PRIMEBANK	21,995	1.5%	3.7x	0.7x	SAIHAMTEX	42.5	39.0	11.0	2,311	95.72
PF1STMF	15.8	-9.5%	34.9	NM	1.1x	OLYMPIC	17,779	1.2%	15.0x	2.1x	SQURPHARMA	217.0	217.0	4.0	425	92.23
MBL1STMF	9.5	-9.5%	34.9	NM	1.1x	UCB	17,577	1.2%	3.8x	0.5x	PTL	90.5	77.0	11.0	1,167	91.72
SHURWID	5.1	-8.9%	0.9	NM	0.4x	UTTARABANK	17,324	1.2%	NM	0.7x	PUBALIBANK	39.0	39.0	2.0	1,250	48.75
PRIME1ICBA	6.8	-8.1%	15.0	NM	0.8x	ROBI	15,661	1.1%	15.0x	2.4x	PRIMEBANK	27.9	27.9	7.0	1,365	38.08
BEACHHATCH	22.9	-7.7%	5.1	4.9x	1.4x	BSRMLTD	14,858	1.0%	4.3x	0.5x	LEGACYFOOT	61.9	61.6	2.0	545	33.66
EBL1STMF	4.2	-6.7%	1.5	NM	0.5x	BEACONPHAR	14,017	1.0%	16.0x	3.0x	DAFODILCOM	153.0	151.0	9.0	110	16.65
TAKAFULINS	47.3	-6.5%	9.2	25.6x	2.4x	JAMUNABANK	13,497	0.9%	3.4x	0.7x	ASIATICLAB	114.0	114.0	1.0	132	14.99
EXIM1STMF	5.8	-6.5%	22.8	NM	0.6x						ENVOYTEX	70.0	70.0	2.0	194	13.55

* 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
BRACBANK	65.1	64.9	127.1	1,953	3
SAIHAMTEX	42.5	39.0	95.7	2,311	11
SQURPHARMA	217.0	217.0	92.2	425	4
PTL	90.5	77.0	91.7	1,167	11
PUBALIBANK	39.0	39.0	48.8	1,250	2
PRIMEBANK	27.9	27.9	38.1	1,365	7
LEGACYFOOT	61.9	61.6	33.7	545	2
DAFODILCOM	153.0	151.0	16.7	110	9
ASIATICLAB	114.0	114.0	15.0	132	1
ENVOYTEX	70.0	70.0	13.5	194	2
BNICL	170.0	168.0	10.0	59	2
KARNAPHULI	56.8	56.5	7.8	137	3
IFIC	5.0	5.0	7.5	1,500	1
ITC	45.7	45.7	5.4	117	1
PROVATIINS	47.3	47.3	5.0	105	1
PRIMEINSUR	42.6	42.6	4.9	115	1
MARICO	2,640.0	2,640.0	4.4	2	1
MERCINS	53.5	50.2	3.0	59	2
RELIANCINS	111.3	108.5	2.3	21	3
BDLAMPS	240.0	240.0	2.1	9	1
GQBALLPEN	612.6	560.0	1.5	3	2
NHFIL	27.0	27.0	1.4	50	1
Total			636.7		82

Important DSE News
EHL

The Board of Directors has recommended 20% Cash Dividend for the year ended June 30, 2026. Date of AGM: 22.12.2026, Time: 10:30 AM, Venue/Mode: By using Digital Platform through the link <https://ehl.bdvirtualagm.com>. Record Date: 29.10.2026. The Company has also reported EPS of Tk. 6.66, NAV per share of Tk. 94.15 and NOCFPS of Tk. (7.43) for the year ended June 30, 2026 as against Tk. 8.27, Tk. 89.99 and Tk. 2.90 respectively for the year ended June 30, 2025. Reasons for deviation: The decrease in NOCFPS was mainly due to increased investment in inventory (land) and higher working capital requirements, which resulted in significantly higher cash outflows during the year.

PF1STMF

Phoenix Finance & Investments Limited, the Sponsor of the Fund, has expressed its intention to sell 2,000,000 units out of its total holding of 12,000,000 units of the Fund at the prevailing market price in the public market through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
APEXSPINN		0.0%	20.0%	Record Date	27-Oct-26
APEXFOODS		0.0%	20.0%	Record Date	27-Oct-26
EHL		0.0%	20.0%	Record Date	29-Oct-26

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