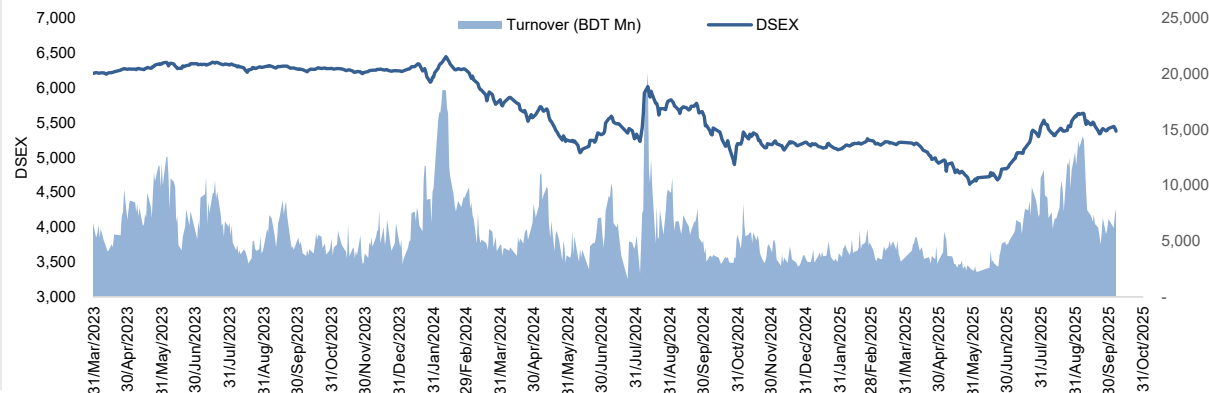


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.86%) lost 46.64 points and closed at 5,377.00. The blue-chip index DS30 (-1.14%), the Shariah-based index DSES (-0.88%), and the large-cap index CDSET (-0.85%) closed at 2,064.96, 1,161.55, and 1,084.06 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.43% followed by Food & Allied (-1.31%), Telecommunication (-1.20%), Bank (-1.00%), Fuel & Power (-0.95%), Pharmaceutical (-0.74%), and Engineering (-0.73%), respectively. Block trades contributed 2.0% of the overall market turnover. CVO Petrochemical Refinery Limited (+5.5%) was the most traded share with a turnover of BDT 272 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,377.00	5,423.64	-46.64	-0.86%	+3.1%
DS30	2,064.96	2,088.80	-23.84	-1.14%	+6.5%
DSES	1,161.55	1,171.91	-10.36	-0.88%	-0.6%
CDSET	1,084.06	1,093.32	-9.26	-0.85%	+1.7%

	Advanced	Declined	Unchanged	Total
All Category	85	282	34	401
A Category (Equity)	67	138	19	224
B Category (Equity)	8	71	2	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	10	73	13	96
Mutual Funds	5	19	12	36
Corporate Bonds	0	1	2	3
Treasury Bonds	0	4	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,220,830	7,291,275	-1.0%
	Mn USD	59,285	59,863	
Turnover	Mn BDT	7,875	7,368	+6.9%
	Mn USD	65	60	
Volume	Mn Shares	267	210	+26.9%
No. of Trade		234,724	210,816	+11.3%

* Average Interbank Exchange Rate is BDT 121.80 as of Oct 07, 2025

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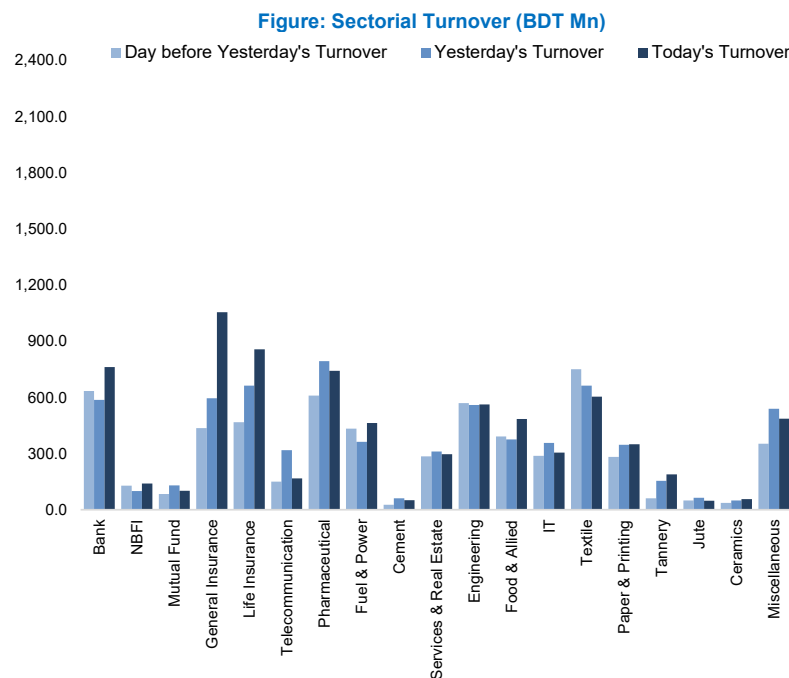
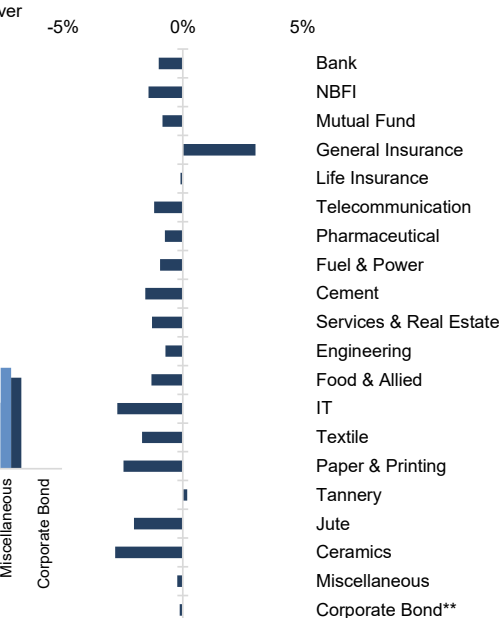


Figure: Sectorial Mcap Change



Market PE 16.2x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFi, ABBANK, IFIC, FIRSTSBANK, GIB and NBL

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	1,484	1,499	-15.02	-1.00%	36	702,083	9.7%	761.5	9.9%	NM	0.8x	GP	397,933	11.0%	26.0	13.5x	7.0x
NBFI	1,077	1,092	-15.63	-1.43%	23	102,606	1.4%	140.6	1.8%	NM	NM	SQURPHARMA	187,839	5.2%	137.8	8.0x	1.4x
Mutual Fund	546	551	-4.66	-0.85%	37	26,180	0.4%	101.6	1.3%	NM	0.5x	ROBI	159,233	4.4%	116.8	18.3x	2.5x
General Insurance	3,109	3,017	+91.60	+3.04%	43	88,719	1.2%	1,054.7	13.7%	14.9x	1.3x	BATBC	145,746	4.0%	43.7	11.7x	2.7x
Life Insurance	2,222	2,224	-2.19	-0.10%	15	59,086	0.8%	856.7	11.1%	NM	NM	BRACBANK	138,768	3.8%	48.4	9.8x	1.6x
Telecommunication	4,964	5,024	-60.21	-1.20%	3	582,024	8.1%	167.9	2.2%	14.6x	4.2x	WALTONHIL	138,553	3.8%	27.0	13.4x	1.1x
Pharmaceutical	3,034	3,057	-22.73	-0.74%	34	575,258	8.0%	741.7	9.6%	13.2x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,158	1,170	-11.10	-0.95%	23	306,877	4.2%	462.4	6.0%	19.4x	0.7x	MARICO	87,797	2.4%	1.4	14.3x	26.3x
Cement	2,012	2,044	-31.98	-1.56%	7	95,874	1.3%	50.6	0.7%	22.1x	2.1x	UPGDCL	83,824	2.3%	9.8	7.2x	2.0x
Services & Real Estate	1,060	1,074	-13.85	-1.29%	9	58,286	0.8%	296.8	3.8%	25.8x	0.4x	BERGERPBL	70,138	1.9%	1.8	20.0x	4.1x
Engineering	2,539	2,558	-18.67	-0.73%	42	286,411	4.0%	562.0	7.3%	15.3x	0.9x	LHB	62,017	1.7%	33.7	16.5x	3.3x
Food & Allied	14,203	14,391	-188.02	-1.31%	21	259,869	3.6%	484.1	6.3%	19.7x	4.1x	RENATA	54,504	1.5%	18.5	19.4x	1.6x
IT	2,035	2,092	-57.19	-2.73%	11	26,842	0.4%	305.1	4.0%	22.6x	1.7x	BXPHARMA	53,043	1.5%	51.5	8.3x	1.1x
Textile	1,180	1,201	-20.42	-1.70%	58	122,933	1.7%	603.5	7.8%	NM	0.8x	UNILEVERCL	46,310	1.3%	0.2	72.9x	25.4x
Paper & Printing	5,482	5,622	-139.41	-2.48%	6	24,767	0.3%	349.2	4.5%	NM	1.2x	ICB	43,363	1.2%	4.7	NM	1.0x
Tannery	2,119	2,115	+3.91	+0.19%	6	23,610	0.3%	188.5	2.4%	NM	1.8x	DUTCHBANGL	38,765	1.1%	10.5	10.3x	0.8x
Jute	14,106	14,399	-293.54	-2.04%	3	3,105	0.0%	47.4	0.6%	NM	NM	EBL	38,619	1.1%	39.8	5.5x	0.9x
Ceramics	408	420	-11.85	-2.82%	5	18,301	0.3%	57.2	0.7%	NM	1.2x	CITYBANK	38,335	1.1%	62.1	3.5x	0.7x
Miscellaneous	4,153	4,162	-9.55	-0.23%	15	225,517	3.1%	485.7	6.3%	89.3x	1.8x	PUBALIBANK	37,742	1.0%	4.0	5.1x	0.7x
Corporate Bond**	16,782	16,804	-21.74	-0.13%	16	37,050	0.5%	0.6	0.0%	NM	NM	PRIMEBANK	32,729	0.9%	14.6	3.9x	0.8x
Treasury Bond**	2,362	2,385	-22.38	-0.94%	235	3,602,383	49.8%	0.9	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
GIB	2.2	+10.0%	22.5	NM	NM	SQURPHARMA	108,958	7.7%	8.0x	1.4x	CVOPRL	201.8	+5.5%	271.8	52.8x	15.4x
FIRSTSBANK	3.3	+10.0%	76.3	NM	1.4x	ISLAMIBANK	74,730	5.3%	NM	0.9x	SONALIPAPR	295.3	-3.9%	252.9	28.6x	1.8x
SIPLC	58.9	+9.9%	142.1	10.3x	2.2x	BEXIMCO	69,463	4.9%	NM	1.3x	RUPALILIFE	126.3	+0.8%	251.3	NM	NM
NORTHRNINS	34.6	+9.8%	11.1	19.9x	1.3x	BATBC	50,233	3.6%	11.7x	2.7x	PRAGATIINS	80.7	+3.9%	208.0	14.6x	1.5x
MEGHNAINS	28.3	+9.7%	62.7	22.3x	2.0x	WALTONHIL	46,773	3.3%	13.4x	1.1x	KBPWBIL	148.1	+2.4%	193.3	NM	12.4x
SIBL	5.7	+9.62%	59.4	NM	0.4x	BRACBANK	46,489	3.3%	9.8x	1.6x	PRAGATILIF	261.8	-0.6%	185.1	NM	NM
EBLNRBMF	3.1	+6.9%	2.6	NM	0x	GP	44,708	3.2%	13.5x	7.0x	ORIONINFU	509.6	-0.2%	183.3	NM	32.4x
JANATAINS	27.8	+5.7%	14.0	31.8x	1.8x	RENATA	32,968	2.3%	19.4x	1.6x	SAPORTL	44.1	+2.6%	160.3	16.4x	1.3x
CVOPRL	201.8	+5.5%	271.8	52.8x	15.4x	BXPHARMA	23,409	1.7%	8.3x	1.1x	APEXFOOT	257.0	+3.9%	150.0	29.8x	0.6x
RELIANCINS	71.5	+5.5%	19.8	7.2x	1.0x	PUBALIBANK	22,905	1.6%	5.1x	0.7x	LOVELLO	99.9	-2.7%	148.7	45.0x	7.9x
						CITYBANK	21,020	1.5%	3.5x	0.7x						
						LHB	20,953	1.5%	16.5x	3.3x						
						OLYMPIC	20,496	1.5%	16.4x	2.5x						
						ALARABANK	18,282	1.3%	36.7x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
						BEACONPHAR	17,838	1.3%	32.3x	4.3x	ENVOYTEX	57.0	56.2	2.0	698	39.22
						PRIMEBANK	16,142	1.1%	3.9x	0.8x	FINEFOODS	310.0	300.0	4.0	74	22.65
						ROBI	14,876	1.1%	18.3x	2.5x	CITYGENINS	68.2	64.0	7.0	266	17.36
						UTTARABANK	13,699	1.0%	NM	0.8x	SAPORTL	42.5	38.7	2.0	254	10.72
						NBL	13,055	0.9%	NM	NM	RELANCE1	17.1	16.8	5.0	592	9.97
						BSRMLTD	12,852	0.9%	5.1x	0.6x	PTL	63.9	59.8	8.0	154	9.52
											KBPWBIL	145.0	139.0	3.0	59	8.54
											CLICL	66.1	57.0	4.0	105	6.63
											AL-HAJTEX	155.0	152.0	5.0	26	4.06
											RUPALILIFE	120.0	120.0	1.0	22	2.64

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

** 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
ENVOYTEX	57.0	56.2	39.2	698	2
FINEFOODS	310.0	300.0	22.6	74	4
CITYGENINS	68.2	64.0	17.4	266	7
SAPORTL	42.5	38.7	10.7	254	2
RELIANCE1	17.1	16.8	10.0	592	5
PTL	63.9	59.8	9.5	154	8
KBPPWBIL	145.0	139.0	8.5	59	3
CLICL	66.1	57.0	6.6	105	4
AL-HAJTEX	155.0	152.0	4.1	26	5
RUPALILIFE	120.0	120.0	2.6	22	1
ASIATICLAB	63.3	60.7	2.5	39	2
UTTARABANK	23.5	23.5	2.4	100	1
PRAGATILIF	265.3	265.0	2.2	8	2
CVOPRL	200.0	193.4	2.0	10	3
LOVELLO	111.0	110.0	1.3	12	2
RANFOUNDRY	169.0	169.0	1.2	7	2
GQBALLPEN	583.0	575.0	1.2	2	2
DOMINAGE	19.0	17.9	1.1	60	2
KOHINOOR	511.0	511.0	1.0	2	1
FEKDIL	20.5	20.5	0.9	46	1
SAMORITA	85.0	85.0	0.9	11	1
BDCOM	27.8	27.8	0.8	30	1
Total			155.9		73

Important DSE News
SOUTHEASTB

Ms. Rehana Kashem, a Sponsor of the Company, has expressed her intention to sell 10,00,000 shares out of her holding of 47,27,537 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within October 30, 2025.

NRBCBANK

Mr. Syed Munsif Ali, a Sponsor of the Company, has completed his selling of 30,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC as per declaration disseminated on 29.09.2025.

MERCANBANK

Mr. Md. Mizanur Rahman Chowdhury, a Sponsor of the company, has expressed his intention to sell 1,89,000 shares out of his total holding of 61,89,999 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. within October 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GSPFINANCE		0.0%	0.0%	Record Date	14-Oct-25
APEXFOOT		25.0%	25.0%	Record Date	20-Oct-25
BANGAS		0.0%	3.0%	Record Date	21-Oct-25
TALLUSPIN		0.0%	0.0%	Record Date	21-Oct-25
BSCPLC		0.0%	40.0%	Record Date	22-Oct-25
MONNOCERA		0.0%	2.0%	Record Date	23-Oct-25
DULAMACOT		0.0%	3.0%	Record Date	23-Oct-25
ENVOYTEX		0.0%	30.0%	Record Date	26-Oct-25
IBNSINA		0.0%	64.0%	Record Date	26-Oct-25
MITHUNKNIT		0.0%	0.0%	Record Date	29-Oct-25
CVOPRL		9.0%	11.0%	Record Date	30-Oct-25

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