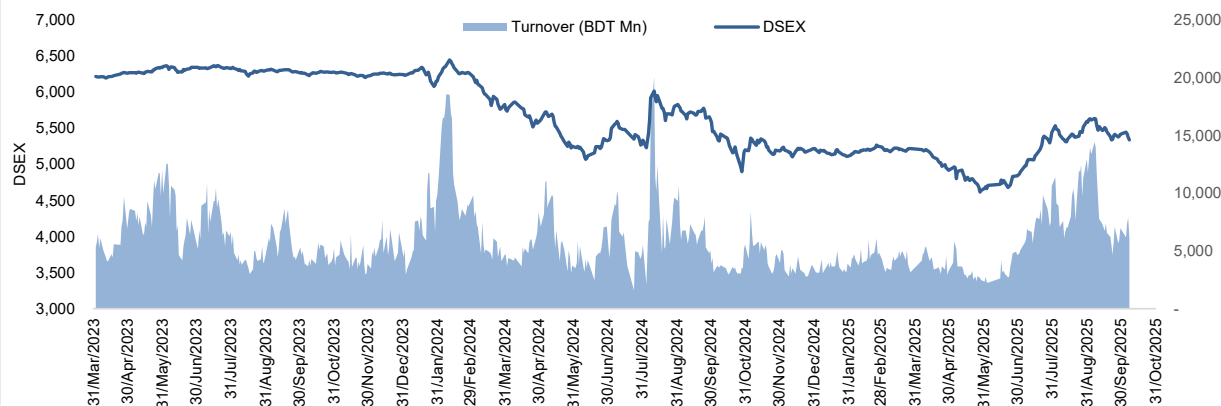


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.73%) lost 39.14 points and closed at 5,337.86. The blue-chip index DS30 (-0.65%), the Shariah-based index DSES (-1.06%), and the large-cap index CDSET (-0.53%) closed at 2,051.54, 1,149.18, and 1,078.36 points, respectively. All the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.22% followed by Bank (-0.87%), Engineering (-0.77%), Food & Allied (-0.56%), Telecommunication (-0.55%), Fuel & Power (-0.42%), and Pharmaceutical (-0.35%), respectively. Block trades contributed 1.1% of the overall market turnover. CVO Petrochemical Refinery Limited (+4.7%) was the most traded share with a turnover of BDT 229 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,337.86	5,377.00	-39.14	-0.73%	+2.3%
DS30	2,051.54	2,064.96	-13.42	-0.65%	+5.8%
DSES	1,149.18	1,161.55	-12.37	-1.06%	-1.7%
CDSET	1,078.36	1,084.06	-5.70	-0.53%	+1.2%

	Advanced	Declined	Unchanged	Total
All Category	105	221	73	399
A Category (Equity)	64	123	36	223
B Category (Equity)	16	52	12	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	25	46	25	96
Mutual Funds	13	8	15	36
Corporate Bonds	2	0	1	3
Treasury Bonds	1	2	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,201,275	7,220,830	-0.3%
	Mn USD	59,124	59,284	
Turnover	Mn BDT	6,119	7,875	-22.3%
	Mn USD	50	65	
Volume	Mn Shares	183	267	-31.4%
No. of Trade		197,305	234,724	-15.9%

* Average Interbank Exchange Rate is BDT 121.80 as of Oct 08, 2025

Figure: Sectorial Turnover (BDT Mn)

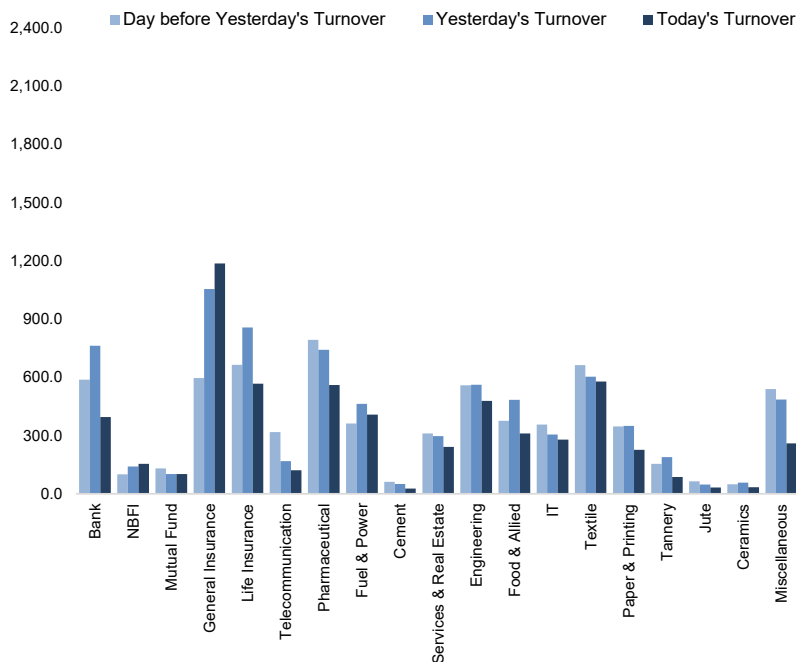
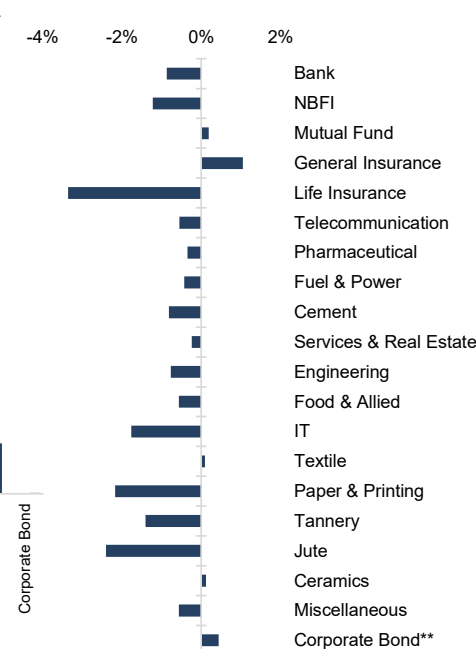


Figure: Sectorial Mcap Change



Market PE 16.1x

Market PB 1.2x

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

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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	1,471	1,484	-12.93	-0.87%	36	695,967	9.7%	394.6	6.5%	NM	0.8x	GP	397,258	11.1%	12.6	13.5x	7.0x
NBFI	1,064	1,077	-13.16	-1.22%	23	101,352	1.4%	154.6	2.6%	NM	NM	SQURPHARMA	188,548	5.3%	97.3	8.0x	1.4x
Mutual Fund	547	546	+1.04	+0.19%	37	26,230	0.4%	102.3	1.7%	NM	0.5x	ROBI	157,138	4.4%	85.6	18.1x	2.4x
General Insurance	3,141	3,109	+32.81	+1.06%	43	89,655	1.2%	1,185.5	19.6%	15.1x	1.3x	BATBC	145,152	4.0%	28.0	11.7x	2.7x
Life Insurance	2,147	2,222	-74.55	-3.36%	15	57,103	0.8%	566.5	9.4%	NM	NM	BRACBANK	138,568	3.9%	39.5	9.8x	1.6x
Telecommunication	4,936	4,964	-27.14	-0.55%	3	578,842	8.0%	121.2	2.0%	14.5x	4.2x	WALTONHIL	137,920	3.8%	11.1	13.3x	1.1x
Pharmaceutical	3,024	3,034	-10.47	-0.35%	34	573,273	8.0%	559.8	9.2%	13.2x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,154	1,158	-4.91	-0.42%	23	305,575	4.2%	408.1	6.7%	19.3x	0.7x	MARICO	88,436	2.5%	1.3	14.4x	26.5x
Cement	1,995	2,012	-16.32	-0.81%	7	95,097	1.3%	26.6	0.4%	21.9x	2.1x	UPGDCL	84,288	2.3%	8.0	7.2x	2.0x
Services & Real Estate	1,057	1,060	-2.52	-0.24%	9	58,147	0.8%	241.8	4.0%	25.7x	0.4x	BERGERPBL	69,451	1.9%	9.5	19.8x	4.0x
Engineering	2,519	2,539	-19.53	-0.77%	42	284,207	3.9%	477.8	7.9%	15.2x	0.8x	LHB	61,553	1.7%	16.8	16.4x	3.2x
Food & Allied	14,123	14,203	-79.67	-0.56%	21	258,411	3.6%	310.6	5.1%	19.6x	4.1x	RENATA	54,423	1.5%	8.5	19.3x	1.6x
IT	1,999	2,035	-35.89	-1.76%	11	26,369	0.4%	279.3	4.6%	22.2x	1.7x	BXPBARMA	52,329	1.5%	49.3	8.2x	1.1x
Textile	1,182	1,180	+1.10	+0.09%	58	123,047	1.7%	577.8	9.5%	NM	0.8x	UNILEVERCL	46,258	1.3%	0.0	72.8x	25.4x
Paper & Printing	5,363	5,482	-119.00	-2.17%	6	24,230	0.3%	226.2	3.7%	NM	1.1x	ICB	41,975	1.2%	14.7	NM	1.0x
Tannery	2,089	2,119	-29.77	-1.41%	6	23,278	0.3%	86.4	1.4%	NM	1.7x	DUTCHBANGL	38,668	1.1%	6.9	10.3x	0.7x
Jute	13,767	14,106	-338.38	-2.40%	3	3,030	0.0%	32.6	0.5%	NM	NM	EBL	38,459	1.1%	6.0	5.5x	0.9x
Ceramics	408	408	+0.51	+0.12%	5	18,323	0.3%	33.6	0.6%	NM	1.2x	CITYBANK	38,183	1.1%	30.7	3.5x	0.7x
Miscellaneous	4,130	4,153	-23.38	-0.56%	15	224,247	3.1%	259.2	4.3%	88.8x	1.8x	PUBALIBANK	36,961	1.0%	8.4	5.0x	0.6x
Corporate Bond**	16,856	16,782	+74.28	+0.44%	16	37,214	0.5%	4.2	0.1%	NM	NM	PRIMEBANK	32,264	0.9%	11.7	3.9x	0.8x
Treasury Bond**	2,363	2,362	+0.53	+0.02%	235	3,601,411	50.0%	5.2	0.1%	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
PIONEERINS	52.0	+9.9%	155.0	12.0x	1.2x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	CVOPRL	211.2	+4.7%	229.4	55.3x	16.1x
BDFINANCE	14.6	+9.8%	29.4	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.9x	RUPALILIFE	117.5	-7.0%	205.2	NM	NM
NURANI	2.4	+9.1%	0.1	NM	0.3x	BEXIMCO	69,463	4.9%	NM	1.3x	ORIONINFU	478.8	-6.0%	171.0	NM	30.5x
GREENDELTA	58.8	+7.9%	39.7	11.0x	0.9x	BATBC	50,233	3.6%	11.7x	2.7x	SONALIPAPR	282.5	-4.3%	169.9	27.4x	1.7x
USMANIAGL	35.8	+7.8%	0.3	NM	0.5x	WALTONHIL	46,773	3.3%	13.3x	1.1x	KAY&QUE	414.0	-6.4%	165.2	NM	4.2x
SIMTEX	23.8	+7.21%	128.8	24.5x	1.1x	BRACBANK	46,489	3.3%	9.8x	1.6x	SAPORTL	44.1	-	159.5	16.4x	1.3x
FASFIN	1.6	+6.7%	0.2	NM	NM	GP	44,708	3.2%	13.5x	7.0x	PRAGATILIF	248.8	-5.0%	156.7	NM	NM
NITOLINS	29.2	+5.8%	25.8	10.4x	0.9x	RENATA	32,968	2.3%	19.3x	1.6x	PIONEERINS	52.0	+9.9%	155.0	12.0x	1.2x
CVOPRL	211.2	+4.7%	229.4	55.3x	16.1x	BXPBARMA	23,409	1.7%	8.2x	1.1x	PRAGATIINS	76.8	-4.8%	138.5	13.9x	1.4x
EASTERNINS	54.5	+4.4%	27.0	22.1x	1.0x	PUBALIBANK	22,905	1.6%	5.0x	0.6x	SIMTEX	23.8	+7.2%	128.8	24.5x	1.1x
						CITYBANK	21,020	1.5%	3.5x	0.7x						
						LHB	20,953	1.5%	16.4x	3.2x						
						OLYMPIC	20,496	1.5%	16.2x	2.5x						
						ALARABANK	18,282	1.3%	36.4x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNIONBANK	2.0	-9.1%	4.7	5.4x	0.1x	BEACONPHAR	17,838	1.3%	31.4x	4.2x	ASIATICLAB	59.1	59.0	2.0	208	12.31
SIBL	5.2	-8.8%	6.9	NM	0x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	AL-HAJTEX	154.4	142.0	7.0	70	10.14
EXIMBANK	4.3	-8.5%	20.6	NM	0.2x	ROBI	14,876	1.1%	18.1x	2.4x	FINEFOODS	298.0	295.0	3.0	32	9.62
ICBIBANK	2.3	-8.0%	0.4	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	CITYGENINS	76.0	62.5	5.0	87	5.81
NBL	3.5	-7.9%	3.7	NM	NM	NBL	13,055	0.9%	NM	NM	DESHBANDHU	22.4	22.4	1.0	200	4.48
PLFSL	1.2	-7.7%	1.3	NM	NM	BSRMLTD	12,852	0.9%	5.1x	0.5x	SALAMCRST	20.6	20.6	1.0	200	4.12
RUPALILIFE	117.5	-7.0%	205.2	NM	NM						SAPORTL	48.4	40.5	2.0	73	3.26
FAREASTFIN	1.4	-6.7%	1.1	NM	NM						RUPALIBANK	21.9	21.9	1.0	90	1.97
KAY&QUE	414.0	-6.4%	165.2	NM	4.2x						ORIONINFU	500.0	500.0	2.0	4	1.80
PREMIERLEA	1.5	-6.3%	0.1	NM	NM						BPML	37.6	37.6	1.0	43	1.62

** 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
ASIATICLAB	59.1	59.0	12.3	208	2
AL-HAJTEX	154.4	142.0	10.1	70	7
FINEFOODS	298.0	295.0	9.6	32	3
CITYGENINS	76.0	62.5	5.8	87	5
DESHBANDHU	22.4	22.4	4.5	200	1
SALAMCRST	20.6	20.6	4.1	200	1
SAPORTL	48.4	40.5	3.3	73	2
RUPALIBANK	21.9	21.9	2.0	90	1
ORIONINFU	500.0	500.0	1.8	4	2
BPML	37.6	37.6	1.6	43	1
MONNOFABR	16.0	16.0	1.6	100	1
PRIMEBANK	27.9	27.9	1.4	50	1
BXPHERMA	125.0	125.0	1.1	9	1
QUASEMIND	44.5	44.5	0.9	20	1
MONNOCERA	88.9	88.9	0.8	9	1
CITYBANK	25.9	25.9	0.6	25	1
PREMIERBAN	6.3	6.3	0.6	100	1
BEACONPHAR	131.0	131.0	0.6	5	1
SIMTEX	21.9	21.9	0.5	25	1
FEKDIL	21.3	21.3	0.5	25	1
EHL	82.2	82.2	0.5	6	1
BEXIMCO	99.3	99.3	0.5	5	1
Total			64.8		37

Important DSE News
AMANFEED

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Aman Feed PLC.' instead of 'Aman Feed Limited' with effect from October 09, 2025. Other information (except name) will remain unchanged.

ACFL

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Aman Cotton Fibrous PLC.' instead of 'Aman Cotton Fibrous Limited' with effect from October 09, 2025. Other information (except name) will remain unchanged.

DHAKABANK

Ms. Rokshana Zaman, a Director of the company, has informed that she will transfer 4,600,000 shares of the company to his spouse Mr. A. T. M. Hayatuzzaman Khan (a Sponsor of the company), by way of gift outside the trading system of the Exchange within October 31, 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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