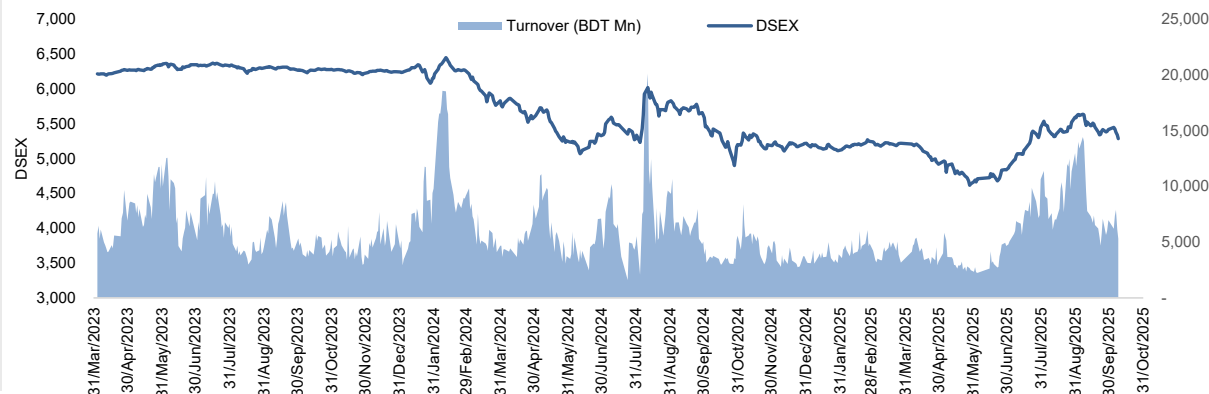


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.01%) lost 54.14 points and closed at 5,283.72. The blue-chip index DS30 (-0.90%), the Shariah-based index DSES (-1.30%), and the large-cap index CDSET (-0.73%) closed at 2,033.04, 1,134.27, and 1,070.49 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.26% followed by NBFI (-1.09%), Pharmaceutical (-0.94%), Food & Allied (-0.91%), Bank (-0.79%), Fuel & Power (-0.75%), and Telecommunication (-0.30%), respectively. Block trades contributed 2.3% of the overall market turnover. Dominage Steel Building Systems Limited (+7.3%) was the most traded share with a turnover of BDT 219 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,283.72	5,337.86	-54.14	-1.01%	+1.3%
DS30	2,033.04	2,051.54	-18.49	-0.90%	+4.8%
DSES	1,134.27	1,149.18	-14.91	-1.30%	-3.0%
CDSET	1,070.49	1,078.36	-7.87	-0.73%	+0.4%

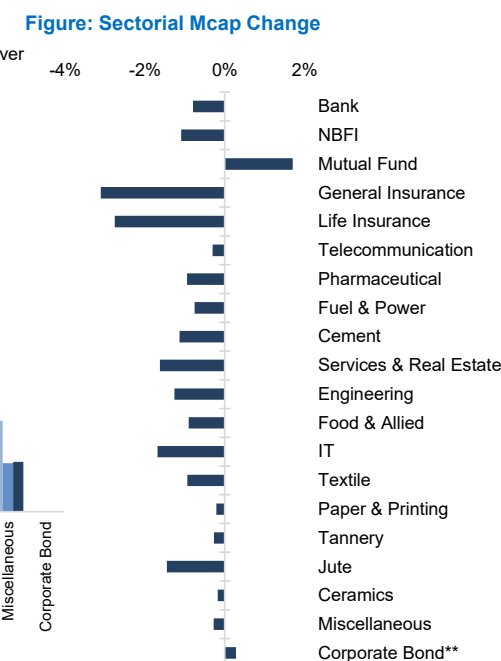
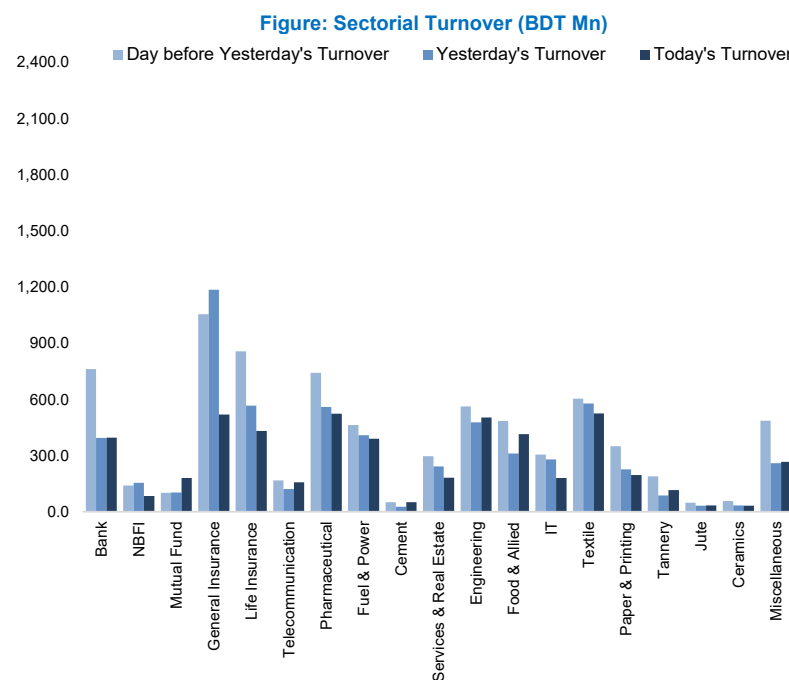
	Advanced	Declined	Unchanged	Total
All Category	72	292	34	398
A Category (Equity)	49	154	18	221
B Category (Equity)	9	66	5	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	14	72	11	97
Mutual Funds	23	2	11	36
Corporate Bonds	1	0	1	2
Treasury Bonds	1	2	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,171,268	7,201,275	-0.4%
	Mn USD	58,878	59,124	
Turnover	Mn BDT	5,302	6,119	-13.4%
	Mn USD	44	50	
Volume	Mn Shares	177	183	-3.2%
	No. of Trade	176,319	197,305	-10.6%

* Average Interbank Exchange Rate is BDT 121.80 as of Oct 09, 2025

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Market PE 15.9x

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	1,459	1,471	-11.68	-0.79%	36	690,442	9.6%	395.4	7.6%	NM	0.8x	GP	397,393	11.2%	12.8	13.5x	7.0x
NBFI	1,052	1,064	-11.59	-1.09%	23	100,248	1.4%	84.6	1.6%	NM	NM	SQURPHARMA	188,725	5.3%	51.0	8.0x	1.4x
Mutual Fund	557	547	+9.34	+1.71%	37	26,678	0.4%	180.4	3.5%	NM	0.5x	ROBI	154,519	4.3%	117.4	17.8x	2.4x
General Insurance	3,044	3,141	-97.65	-3.11%	43	86,868	1.2%	519.4	10.0%	14.6x	1.3x	BATBC	143,208	4.0%	40.3	11.5x	2.7x
Life Insurance	2,088	2,147	-59.20	-2.76%	15	55,529	0.8%	430.9	8.3%	NM	NM	BRACBANK	138,768	3.9%	20.2	9.8x	1.6x
Telecommunication	4,922	4,936	-14.96	-0.30%	3	577,088	8.0%	157.2	3.0%	14.4x	4.2x	WALTONHIL	135,488	3.8%	26.5	13.1x	1.1x
Pharmaceutical	2,995	3,024	-28.48	-0.94%	34	567,873	7.9%	523.0	10.1%	13.0x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,145	1,154	-8.71	-0.75%	23	303,269	4.2%	390.2	7.5%	19.1x	0.6x	MARICO	86,660	2.4%	28.9	14.1x	26.0x
Cement	1,973	1,995	-22.56	-1.13%	7	94,021	1.3%	50.6	1.0%	21.7x	2.1x	UPGDCL	83,650	2.4%	5.4	7.2x	2.0x
Services & Real Estate	1,040	1,057	-17.14	-1.62%	9	57,205	0.8%	181.5	3.5%	25.3x	0.4x	BERGERPBL	69,480	2.0%	18.1	19.8x	4.0x
Engineering	2,488	2,519	-31.66	-1.26%	42	280,635	3.9%	503.9	9.7%	15.0x	0.8x	LHB	60,972	1.7%	37.6	16.3x	3.2x
Food & Allied	13,995	14,123	-127.82	-0.91%	21	256,073	3.6%	414.2	8.0%	19.4x	4.1x	RENATA	54,079	1.5%	11.4	19.2x	1.6x
IT	1,966	1,999	-33.70	-1.69%	11	25,925	0.4%	179.6	3.5%	21.8x	1.6x	BXPHARMA	50,812	1.4%	51.6	7.9x	1.0x
Textile	1,170	1,182	-11.05	-0.94%	58	121,896	1.7%	524.5	10.1%	NM	0.8x	UNILEVERCL	46,195	1.3%	0.1	72.7x	25.3x
Paper & Printing	5,352	5,363	-11.26	-0.21%	6	24,179	0.3%	195.4	3.8%	NM	1.1x	ICB	41,975	1.2%	3.2	NM	1.0x
Tannery	2,084	2,089	-5.60	-0.27%	6	23,216	0.3%	115.7	2.2%	NM	1.7x	EBL	38,300	1.1%	23.7	5.5x	0.9x
Jute	13,568	13,767	-199.17	-1.45%	3	2,987	0.0%	33.4	0.6%	NM	NM	DUTCHBANGL	38,185	1.1%	9.5	10.2x	0.7x
Ceramics	408	408	-0.72	-0.18%	5	18,291	0.3%	32.6	0.6%	NM	1.2x	CITYBANK	37,878	1.1%	43.8	3.5x	0.7x
Miscellaneous	4,118	4,130	-11.28	-0.27%	15	223,635	3.1%	265.6	5.1%	88.6x	1.8x	PUBALIBANK	36,700	1.0%	4.8	5.0x	0.6x
Corporate Bond**	16,904	16,856	+47.56	+0.28%	16	37,319	0.5%	0.5	0.0%	NM	NM	PRIMEBANK	31,800	0.9%	21.1	3.8x	0.8x
Treasury Bond**	2,364	2,363	+1.65	+0.07%	235	3,601,626	50.2%	2.3	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
RAHIMAFOOD	154.4	+9.0%	148.8	NM	16.8x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	DOMINAGE	20.7	+7.3%	219.0	NM	1.2x
DOMINAGE	20.7	+7.3%	219.0	NM	1.2x	ISLAMIBANK	74,730	5.3%	NM	0.9x	CVOPRL	212.8	+0.8%	191.4	55.7x	16.2x
FAMILYTEX	1.8	+5.9%	2.4	NM	0.2x	BEXIMCO	69,463	4.9%	NM	1.3x	RAHIMAFOOD	154.4	+9.0%	148.8	NM	16.8x
EXIM1STMF	3.9	+5.4%	1.2	NM	0.4x	BATBC	50,233	3.6%	11.5x	2.7x	RUPALILIFE	114.6	-2.5%	144.2	NM	NM
ACMEPL	16.7	+4.4%	44.8	NM	1.0x	WALTONHIL	46,773	3.3%	13.1x	1.1x	SONALIPAPR	289.3	+2.4%	131.6	28.0x	1.7x
VAMLBDMF1	7.4	+4.23%	4.2	NM	0.7x	BRACBANK	46,489	3.3%	9.8x	1.6x	ROBI	29.5	-1.7%	117.4	17.8x	2.4x
CAPITECGBF	7.7	+4.1%	34.9	NM	1x	GP	44,708	3.2%	13.5x	7.0x	PRAGATILIF	245.6	-1.3%	115.7	NM	NM
SEMLLECMF	7.7	+4.1%	23.1	NM	0.9x	RENATA	32,968	2.3%	19.2x	1.6x	SAPORTL	44.4	+0.7%	111.2	16.5x	1.3x
ICBSONALI1	5.2	+4.0%	8.2	NM	0.8x	BXPHARMA	23,409	1.7%	7.9x	1.0x	ORIONINFU	461.5	-3.6%	109.0	NM	29.4x
VAMLRBBF	5.6	+3.7%	2.7	NM	0.5x	PUBALIBANK	22,905	1.6%	5.0x	0.6x	PRAGATIINS	77.6	+1.0%	101.9	14.0x	1.4x
						CITYBANK	21,020	1.5%	3.5x	0.7x						
						LHB	20,953	1.5%	16.3x	3.2x						
						OLYMPIC	20,496	1.5%	16.2x	2.5x						
						ALARABANK	18,282	1.3%	36.4x	0.8x						
						BEACONPHAR	17,838	1.3%	30.7x	4.1x						
						PRIMEBANK	16,142	1.1%	3.8x	0.8x						
						ROBI	14,876	1.1%	17.8x	2.4x						
						UTTARABANK	13,699	1.0%	NM	0.8x						
						NBL	13,055	0.9%	NM	NM						
						BSRMLTD	12,852	0.9%	5.0x	0.5x						
						* NIBFI 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
UNIONBANK	1.8	-10.0%	2.8	4.9x	0.1x											
GSPFINANCE	2.7	-10.0%	1.0	NM	NM											
SIBL	4.7	-9.6%	1.0	NM	0.3x											
GIB	1.9	-9.5%	3.8	NM	NM											
EXIMBANK	3.9	-9.3%	20.0	NM	0.2x											
PRIMEFIN	2.1	-8.7%	1.8	NM	0.3x											
ISLAMICFIN	6.4	-8.6%	1.8	NM	NM											
BIFC	3.2	-8.6%	0.5	NM	NM											
PLFSL	1.1	-8.3%	2.5	NM	NM											
FIRSTFIN	2.3	-8.0%	0.3	NM	NM											
						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
						FINEFOODS	311.5	290.0	6.0	151	44.97					
						ENVOYTEX	56.0	56.0	1.0	688	38.50					
						CITYGENINS	68.8	64.5	2.0	84	5.59					
						ASIATICLAB	60.5	59.4	2.0	72	4.28					
						DOMINAGE	19.8	18.7	3.0	224	4.24					
						RUPALILIFE	129.0	129.0	1.0	23	2.92					
						WALTONHIL	407.0	407.0	1.0	7	2.85					
						CITYBANK	27.6	27.6	1.0	100	2.76					
						AL-HAJTEX	157.0	153.0	3.0	14	2.20					
						UNIQUEHRL	39.6	39.6	1.0	52	2.04					

* 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
FINEFOODS	311.5	290.0	45.0	151	6
ENVOYTEX	56.0	56.0	38.5	688	1
CITYGENINS	68.8	64.5	5.6	84	2
ASIATICLAB	60.5	59.4	4.3	72	2
DOMINAGE	19.8	18.7	4.2	224	3
RUPALILIFE	129.0	129.0	2.9	23	1
WALTONHIL	407.0	407.0	2.8	7	1
CITYBANK	27.6	27.6	2.8	100	1
AL-HAJTEX	157.0	153.0	2.2	14	3
UNIQUEHRL	39.6	39.6	2.0	52	1
PTL	55.0	55.0	1.8	32	1
BPML	30.5	30.5	1.7	54	1
PRAGATILIF	253.6	253.6	1.2	5	1
MIDLANDBNK	20.5	20.5	1.0	50	1
APEXSPINN	174.5	174.5	0.8	5	1
NLTUBES	81.0	81.0	0.8	9	1
CLICL	66.3	66.3	0.7	11	1
BEXIMCO	99.1	99.1	0.7	7	1
BEACONPHAR	128.0	128.0	0.6	5	1
SONALIPAPR	307.0	307.0	0.6	2	1
PRIMELIFE	47.0	47.0	0.5	11	1
Total			120.7		32

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
APEXFOODS		0.0%	20.0%	Record Date	30-Oct-25
APEXSPINN		0.0%	20.0%	Record Date	30-Oct-25

Important DSE News
GENEXIL

The company has informed that the Board of Directors has decided to appoint Mr. Hassan Shahid Sarwar FCA as the Chairman (Acting) of the Board with effect from October 09, 2025.

NRBCBANK

Mr. Syed Munsif Ali, a Sponsor of the Company, has expressed his intention to sell 17,36,503 shares out of his holding of 23,54,645 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within October 30, 2025.

APEXFOODS

The Board of Directors has recommended 20% Cash Dividend (Tk. 2 per share of Tk. 10 each) for the year ended June 30, 2025. Date of AGM: 29.11.2025, Time: 11:30 AM, Venue: Digital Platform. Record Date: 30.10.2025. The Company has also reported EPS of Tk. 6.41, NAV per share of Tk. 126.05 and NOCFPS of Tk. (59.16) for the year ended June 30, 2025 as against Tk. 5.66, Tk. 127.82 and Tk. 23.90 respectively for the year ended June 30, 2024. There was significant variance occurs between 2023-2024 and 2024-2025 performance as the EPS of 2023-2024 was Tk. 5.66 and it became Tk. 6.41 for the year 2024-2025 due to increase in revenue and finance income.

APEXSPINN

The Board of Directors has recommended 20% Cash Dividend (Tk. 2 per share of Tk. 10 each) for the year ended June 30, 2025. Date of AGM: 29.11.2025, Time: 10:00 AM, Venue: Digital Platform. Record date: 30.10.2025. The Company has also reported EPS of Tk. 3.60, NAV per share of Tk. 83.11 and NOCFPS of Tk. 22.15 for the year ended June 30, 2025 as against Tk. 7.39 (restated), Tk. 82.76 (restated) and Tk. 22.42 respectively for the year ended June 30, 2024.

SOUTHEASTB

The Company has informed that 32,010,893 shares (out of total holding of 35,844,313 shares) of Late Md. Akikur Rahman, a sponsor shareholder and former director of the company who passed away on 20.03.2025, will be transmitted among his successors according to the Succession Certificate issued by the Honorable Court.

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