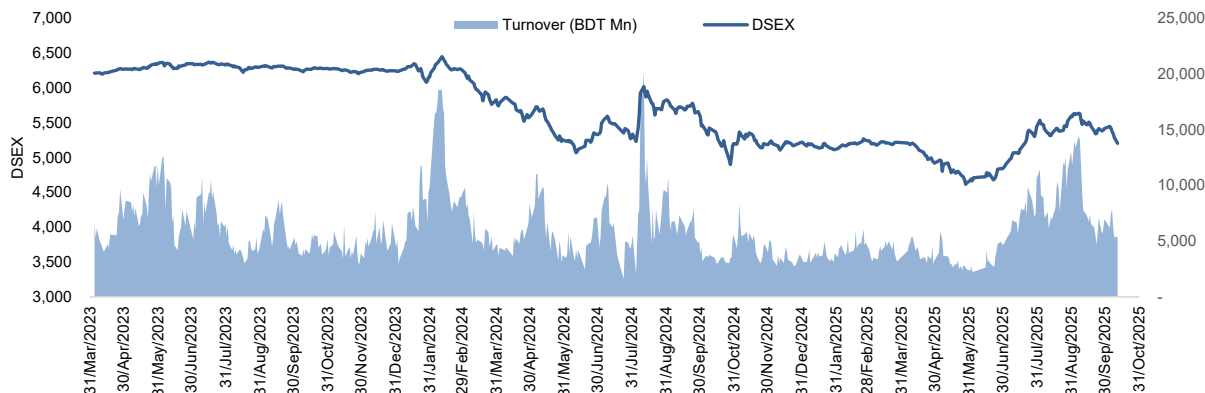


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.54%) lost 81.25 points and closed at 5,202.46. The blue-chip index DS30 (-1.70%), the Shariah-based index DSES (-1.72%), and the large-cap index CDSET (-1.24%) closed at 1,998.44, 1,114.80, and 1,057.24 points, respectively. All the large-cap sectors posted negative performance today. NBLFI experienced the highest loss of 2.40% followed by Engineering (-1.98%), Bank (-1.94%), Food & Allied (-1.56%), Fuel & Power (-1.30%), Telecommunication (-0.51%), and Pharmaceutical (-0.47%), respectively. Block trades contributed 2.6% of the overall market turnover. CVO Petrochemical Refinery Limited (-4.8%) was the most traded share with a turnover of BDT 239 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,202.46	5,283.72	-81.25	-1.54%	-0.3%
DS30	1,998.44	2,033.04	-34.60	-1.70%	+3.0%
DSES	1,114.80	1,134.27	-19.47	-1.72%	-4.6%
CDSET	1,057.24	1,070.49	-13.25	-1.24%	-0.8%

	Advanced	Declined	Unchanged	Total
All Category	47	311	38	396
A Category (Equity)	27	175	17	219
B Category (Equity)	9	70	1	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	11	66	20	97
Mutual Funds	7	18	11	36
Corporate Bonds	1	1	0	2
Treasury Bonds	1	0	0	1

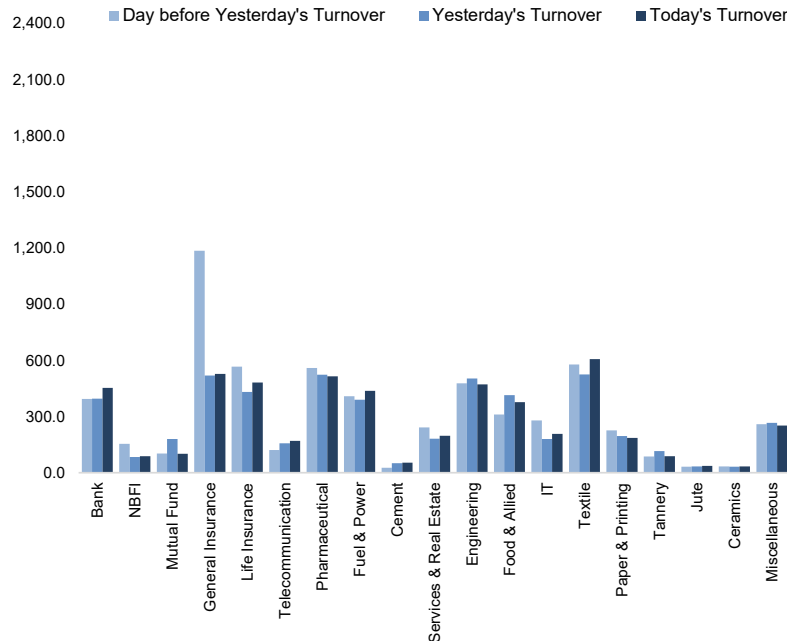
\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,126,689	7,171,268	-0.6%
	Mn USD	58,511	58,877	
Turnover	Mn BDT	5,426	5,302	+2.3%
	Mn USD	45	44	
Volume	Mn Shares	160	177	-9.7%
No. of Trade		170,194	176,319	-3.5%

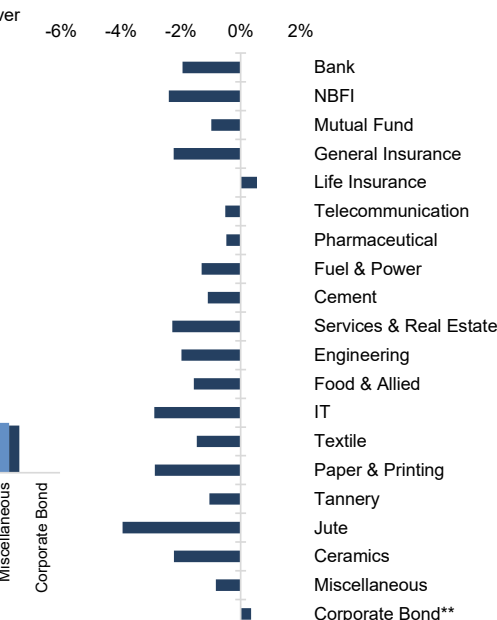
\* Average Interbank Exchange Rate is BDT 121.80 as of Oct 12, 2025

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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



Market PE 15.6x

Market PB 1.2x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBLFI, 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	1,431	1,459	-28.35	-1.94%	36	677,029	9.5%	453.5	8.6%	NM	0.8x	GP	396,313	11.3%	9.4	13.5x	7.0x
NBFI	1,027	1,052	-25.25	-2.40%	23	97,842	1.4%	88.0	1.7%	NM	NM	SQURPHARMA	188,637	5.4%	89.5	8.0x	1.4x
Mutual Fund	551	557	-5.48	-0.98%	37	26,415	0.4%	100.7	1.9%	NM	0.5x	ROBI	152,948	4.4%	133.6	17.6x	2.4x
General Insurance	2,976	3,044	-68.10	-2.24%	43	84,925	1.2%	528.0	10.0%	14.3x	1.3x	BATBC	140,292	4.0%	40.2	11.3x	2.6x
Life Insurance	2,099	2,088	+11.33	+0.54%	15	55,830	0.8%	482.2	9.1%	NM	NM	BRACBANK	135,781	3.9%	33.6	9.6x	1.6x
Telecommunication	4,896	4,922	-25.33	-0.51%	3	574,118	8.1%	169.7	3.2%	14.4x	4.1x	WALTONHIL	131,889	3.8%	17.7	12.7x	1.1x
Pharmaceutical	2,981	2,995	-14.21	-0.47%	34	565,179	7.9%	514.9	9.7%	13.0x	1.6x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,130	1,145	-14.93	-1.30%	23	299,314	4.2%	437.4	8.3%	16.9x	0.6x	MARICO	88,146	2.5%	3.3	14.4x	26.4x
Cement	1,951	1,973	-21.66	-1.10%	7	92,989	1.3%	53.3	1.0%	21.4x	2.1x	UPGDCL	83,418	2.4%	7.5	7.2x	2.0x
Services & Real Estate	1,016	1,040	-23.75	-2.28%	9	55,899	0.8%	197.2	3.7%	24.7x	0.4x	BERGERPBL	69,387	2.0%	4.8	19.8x	4.0x
Engineering	2,439	2,488	-49.14	-1.98%	42	275,092	3.9%	471.4	8.9%	14.7x	0.8x	LHB	60,624	1.7%	39.1	16.2x	3.2x
Food & Allied	13,776	13,995	-218.68	-1.56%	21	252,071	3.5%	376.7	7.1%	19.1x	4.0x	RENATA	53,644	1.5%	8.7	19.1x	1.5x
IT	1,909	1,966	-56.76	-2.89%	11	25,176	0.4%	206.8	3.9%	21.2x	1.6x	BXPHARMA	49,608	1.4%	33.1	7.7x	1.0x
Textile	1,153	1,170	-17.17	-1.47%	58	120,108	1.7%	606.0	11.5%	99.1x	0.8x	UNILEVERCL	46,048	1.3%	0.1	72.5x	25.3x
Paper & Printing	5,198	5,352	-153.39	-2.87%	6	23,486	0.3%	186.6	3.5%	NM	1.1x	ICB	41,108	1.2%	2.3	NM	1.0x
Tannery	2,062	2,084	-21.70	-1.04%	6	22,974	0.3%	88.4	1.7%	NM	1.7x	DUTCHBANGL	37,605	1.1%	2.8	10.0x	0.7x
Jute	13,033	13,568	-535.21	-3.94%	3	2,869	0.0%	36.7	0.7%	NM	NM	EBL	37,502	1.1%	42.8	5.4x	0.8x
Ceramics	399	408	-9.10	-2.23%	5	17,883	0.3%	33.4	0.6%	NM	1.2x	CITYBANK	36,661	1.0%	83.2	3.4x	0.7x
Miscellaneous	4,084	4,118	-34.22	-0.83%	15	221,776	3.1%	251.6	4.8%	87.9x	1.8x	PUBALIBANK	36,180	1.0%	1.5	4.9x	0.6x
Corporate Bond**	16,963	16,904	+59.33	+0.35%	16	37,450	0.5%	0.6	0.0%	NM	NM	PRIMEBANK	30,872	0.9%	20.2	3.7x	0.8x
Treasury Bond**	2,366	2,364	+1.88	+0.08%	235	3,602,165	50.5%	3.3	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
SIMTEX	26.7	+9.9%	183.5	27.5x	1.2x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	CVOPRL	202.6	-4.8%	238.6	53.0x	15.4x
PRAGATILIF	267.0	+8.7%	195.0	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.9x	PRAGATILIF	267.0	+8.7%	195.0	NM	NM
SALAMCRST	19.2	+6.1%	40.9	NM	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	PRAGATIINS	81.4	+4.9%	186.1	14.7x	1.5x
GREENDELMF	3.7	+5.7%	1.4	NM	0.4x	BATBC	50,233	3.6%	11.3x	2.6x	SIMTEX	26.7	+9.9%	183.5	27.5x	1.2x
BDLAMPS	165.0	+5.7%	16.5	NM	3.7x	WALTONHIL	46,773	3.3%	12.7x	1.1x	RUPALILIFE	115.9	+1.1%	167.1	NM	NM
PRAGATIINS	81.4	+4.90%	186.1	14.7x	1.5x	BRACBANK	46,489	3.3%	9.6x	1.6x	DOMINAGE	20.9	+1.0%	146.5	NM	1.2x
CNATEX	2.9	+3.6%	1.6	NM	NM	GP	44,708	3.2%	13.5x	7.0x	ROBI	29.2	-1.0%	133.6	17.6x	2.4x
PHOENIXFIN	3.1	+3.3%	0.2	NM	NM	RENATA	32,968	2.3%	19.1x	1.5x	SONALIPAPR	282.4	-2.4%	131.9	27.4x	1.7x
INTRACO	28.3	+3.3%	101.8	25.0x	2.2x	BXPHARMA	23,409	1.7%	7.7x	1.0x	SAPORTL	45.5	+2.5%	127.3	16.9x	1.3x
DSHGARME	119.0	+2.9%	12.2	NM	6.4x	PUBALIBANK	22,905	1.6%	4.9x	0.6x	RAHIMAFOOD	157.1	+1.7%	127.2	NM	17.1x
						CITYBANK	21,020	1.5%	3.4x	0.7x						
						LHB	20,953	1.5%	16.2x	3.2x						
						OLYMPIC	20,496	1.5%	16.1x	2.5x						
						ALARABANK	18,282	1.3%	35.8x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
						BEACONPHAR	17,838	1.3%	30.0x	4.0x	ENVOYTEX	57.2	57.2	1.0	686	39.25
						PRIMEBANK	16,142	1.1%	3.7x	0.8x	ASIATICLAB	61.5	60.9	3.0	317	19.34
						ROBI	14,876	1.1%	17.6x	2.4x	FINEFOODS	300.0	295.0	2.0	40	11.85
						UTTARABANK	13,699	1.0%	NM	0.8x	PRAGATILIF	260.2	252.0	7.0	41	10.47
						NBL	13,055	0.9%	NM	NM	SAPORTL	44.8	40.0	3.0	170	7.28
						BSRMLTD	12,852	0.9%	5.0x	0.5x	AL-HAJTEX	158.0	138.0	6.0	43	6.05
											BATBC	260.1	260.1	1.0	20	5.20
											ORIONINFU	450.0	450.0	1.0	11	4.95
											LOVELLO	92.1	88.0	4.0	51	4.59
											DBH1STMF	6.3	6.3	1.0	700	4.41

\* 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	57.2	57.2	39.3	686	1
ASIATICLAB	61.5	60.9	19.3	317	3
FINEFOODS	300.0	295.0	11.9	40	2
PRAGATILIF	260.2	252.0	10.5	41	7
SAPORTL	44.8	40.0	7.3	170	3
AL-HAJTEX	158.0	138.0	6.1	43	6
BATBC	260.1	260.1	5.2	20	1
ORIONINFU	450.0	450.0	5.0	11	1
LOVELLO	92.1	88.0	4.6	51	4
DBH1STMF	6.3	6.3	4.4	700	1
DOMINAGE	22.6	19.0	3.6	176	3
SIMTEX	24.5	23.5	3.4	142	5
EBL	21.6	21.6	3.2	150	1
ITC	45.7	44.7	2.8	62	2
ACMELAB	69.7	69.7	2.0	29	1
GOLDENSON	12.5	12.5	2.0	158	1
CITYGENINS	76.0	75.5	1.5	20	2
PROVATIINS	30.8	30.8	1.3	42	1
CAPITECGBF	7.5	7.5	1.1	146	1
SILCOPHL	16.0	16.0	1.0	63	1
EHL	79.7	79.7	0.7	8	1
CITYBANK	25.6	25.6	0.7	26	1
<b>Total</b>			<b>139.0</b>		<b>53</b>

**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
LOVELLO		5.0%	11.0%	Record Date	6-Nov-25
DESCO		0.0%	0.0%	Record Date	20-Nov-25

**Important DSE News**
**LOVELLO**

The Board of Directors has recommended a total of 16% dividend (Cash Dividend @ 11% and Stock Dividend @ 5%) for the year ended June 30, 2025. Date of AGM: 30.12.2025; Time: 10:00 AM; Venue: Hybrid System in combination of physical and digital presence. Record Date: 06.11.2025. The Company has also reported EPS of Tk. 1.65, NAV per share of Tk. 12.01 and NOCFPS of Tk. 1.48 for the year ended June 30, 2025 as against Tk. 1.79 (restated), Tk. 12.40 (restated) and Tk. 2.70 (restated) respectively for the year ended June 30, 2024. The board of directors of the company has proposed to increase its Authorized Capital from Tk. 100 Crore to Tk. 200 Crore, subject to the approval of regulatory authorities and the shareholders in the upcoming 14th Annual General Meeting (AGM).

**(Q3 Un-audited):** EPS was Tk. 0.22 for January-March 2025 as against Tk. 0.71 for January-March 2024; EPS was Tk. 1.59 for July 2024-March 2025 as against Tk. 1.28 for July 2023-March 2024. NOCFPS was Tk. 2.82 for July 2024-March 2025 as against Tk. 3.50 for July 2023-March 2024. NAV per share was Tk. 11.95 as on March 31, 2025 and Tk. 12.40 (restated) as on June 30, 2024.

**(Q1 Un-audited):** EPS was Tk. 1.02 for July-September 2025 as against Tk. 0.91 for July-September 2024; NOCFPS was Tk. 2.43 for July-September 2025 as against Tk. 1.68 for July-September 2024. NAV per share was Tk. 13.03 as on September 30, 2025 and Tk. 12.01 as on June 30, 2025. During the Period ended on September 2025, Net profit after TAX has increased 24% compared to the last financial year as the sales increased 15%. As a result, EPS has also increased in comparison to the 1st Quarter of the last FY.

**DESCO**

The Board of Directors has recommended No Dividend for the year ended June 30, 2025. Date of AGM: 17.01.2026, Time: 10:00 AM, Venue: Digital Platform. Record Date: 20.11.2025. The Company has also reported EPS of Tk. (3.15), NAV per share of Tk. 35.33 and NOCFPS of Tk. 15.93 for the year ended June 30, 2025 as against EPS of Tk. (12.72), NAV per share of Tk. 37.92 and NOCFPS of Tk. 15.49 for the year ended June 30, 2024.

The Company will be placed in 'Z' category from existing 'A' category with effect from October 13, 2025 as the company has failed to declare any dividend for a period of 2 (two) consecutive years according to provision 1(a) of BSEC Directive No. BSEC/CMRRCD/2009-193/77 dated May 20, 2024.

**ITC**

The Board of Directors of the company has approved that the Company will invest as equity Partner of the formation of new subsidiary Company of City Bank PLC. under the proposed title of "City Credit Bureau PLC." Up-to a value of Ten percent (10%) of the Paid up Capital and the Managing Director & CEO, Dr. Kazi Saifuddin Munir as nominated & authorized for all operational activities on behalf of the company.

**RAKCERAMIC**

Mr. SAK Ekramuzzaman, Sponsor Shareholder and Managing Director of RAK Ceramics (Bangladesh) Limited, has declared that he is the Proprietor of Mohammed Trading. He has informed that Mohammad Trading has intended to purchase 85,000 shares (approx.) of RAK Ceramics (Bangladesh) Limited at the current market price through the Dhaka Stock Exchange PLC. and Chittagong Stock Exchange PLC.

**RANFOUNDRY**

The company has informed that as per BSEC's consent letter dated October 06, 2025, regarding the appointment of the Independent Directors of the company, the Board of Directors has appointed Mr. Abu Taher Chowdhury and Mrs. Zakia Sultana as Independent Directors of the company, subject to the approval by the shareholders in the upcoming AGM.

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