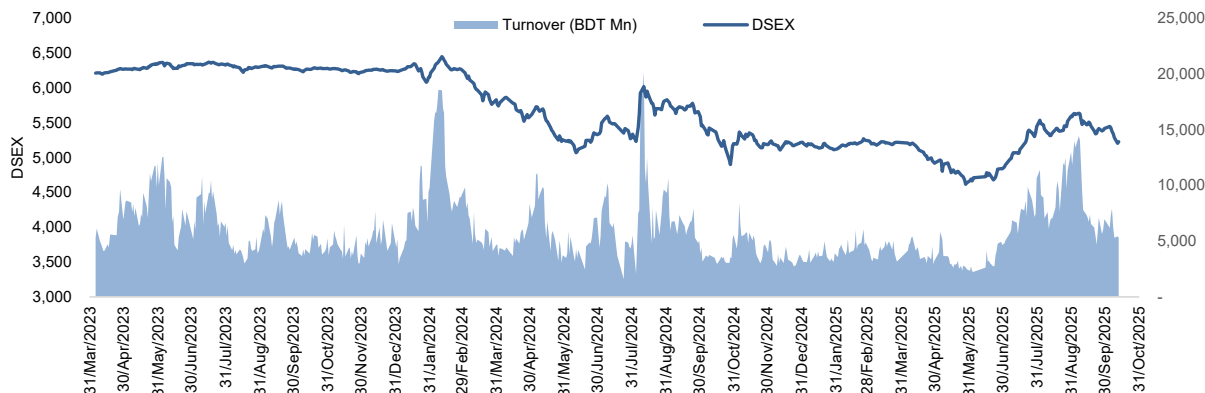


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.49%) gained 25.29 points and closed at 5,227.75. The blue-chip index DS30 (+0.57%), the Shariah-based index DSES (+0.26%), and the large-cap index CDSET (+0.33%) closed at 2,009.88, 1,117.74, and 1,060.78 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.16% followed by Telecommunication (+0.80%), Bank (+0.52%), Food & Allied (+0.41%), Engineering (+0.30%), Pharmaceutical (+0.07%), and Fuel & Power (0.00%), respectively. Block trades contributed 3.2% of the overall market turnover. Dominance Steel Building Systems Limited (+6.2%) was the most traded share with a turnover of BDT 266 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,227.75	5,202.46	+25.29	+0.49%	+0.2%
DS30	2,009.88	1,998.44	+11.44	+0.57%	+3.6%
DSES	1,117.74	1,114.80	+2.94	+0.26%	-4.4%
CDSET	1,060.78	1,057.24	+3.54	+0.33%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	230	120	50	400
A Category (Equity)	137	62	22	221
B Category (Equity)	54	18	9	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	39	40	19	98
Mutual Funds	4	20	12	36
Corporate Bonds	1	1	0	2
Treasury Bonds	1	3	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,117,058	7,126,689	-0.1%
	Mn USD	58,432	58,511	
Turnover	Mn BDT	5,300	5,426	-2.3%
	Mn USD	44	45	
Volume	Mn Shares	178	160	+11.5%
No. of Trade		164,448	170,194	-3.4%

* Average Interbank Exchange Rate is BDT 121.80 as of Oct 13, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

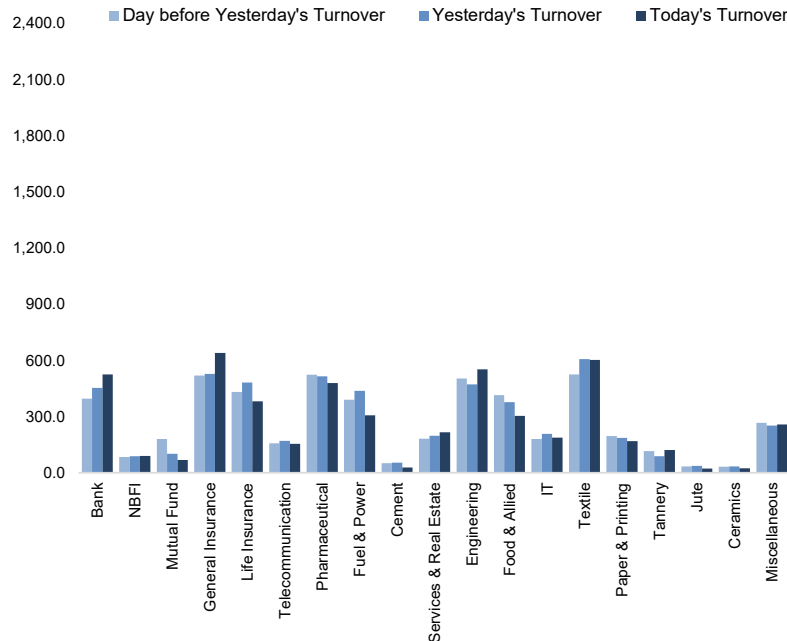
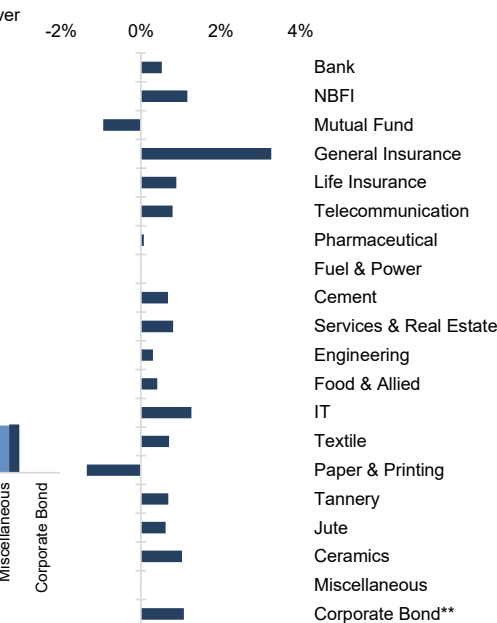


Figure: Sectorial Mcap Change



Market PE 15.7x

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	1,438	1,431	+7.47	+0.52%	36	680,564	9.6%	524.2	10.2%	NM	0.8x	GP	396,988	11.2%	9.8	13.5x	7.0x
NBFI	1,039	1,027	+11.93	+1.16%	23	98,979	1.4%	89.0	1.7%	NM	NM	SQURPHARMA	188,194	5.3%	113.1	8.0x	1.4x
Mutual Fund	546	551	-5.21	-0.94%	37	26,166	0.4%	68.2	1.3%	NM	0.5x	ROBI	156,614	4.4%	115.3	18.0x	2.4x
General Insurance	3,073	2,976	+97.16	+3.27%	43	87,698	1.2%	639.8	12.5%	14.8x	1.3x	BATBC	140,238	4.0%	37.4	11.3x	2.6x
Life Insurance	2,118	2,099	+18.63	+0.89%	15	56,326	0.8%	381.3	7.4%	NM	NM	BRACBANK	137,374	3.9%	18.1	9.7x	1.6x
Telecommunication	4,935	4,896	+38.94	+0.80%	3	578,684	8.1%	155.0	3.0%	14.5x	4.2x	WALTONHIL	131,889	3.7%	10.7	12.7x	1.1x
Pharmaceutical	2,983	2,981	+2.17	+0.07%	34	565,591	7.9%	479.3	9.3%	13.0x	1.6x	BEXIMCO	103,850	2.9%	0.1	NM	1.3x
Fuel & Power	1,130	1,130	-0.01	-0.00%	23	299,311	4.2%	306.5	6.0%	16.9x	0.6x	MARICO	87,142	2.5%	19.1	14.2x	26.1x
Cement	1,964	1,951	+13.24	+0.68%	7	93,620	1.3%	28.5	0.6%	21.6x	2.1x	UPGDCL	83,476	2.4%	9.0	7.2x	2.0x
Services & Real Estate	1,025	1,016	+8.19	+0.81%	9	56,349	0.8%	215.9	4.2%	24.9x	0.4x	BERGERPBL	69,554	2.0%	1.8	19.8x	4.0x
Engineering	2,446	2,439	+7.38	+0.30%	42	275,924	3.9%	552.3	10.8%	14.7x	0.8x	LHB	60,972	1.7%	21.3	16.3x	3.2x
Food & Allied	13,833	13,776	+56.24	+0.41%	21	253,100	3.6%	303.1	5.9%	19.2x	4.0x	RENATA	53,781	1.5%	3.3	19.1x	1.6x
IT	1,933	1,909	+24.11	+1.26%	11	25,494	0.4%	187.1	3.6%	21.5x	1.6x	BXPHARMA	50,723	1.4%	26.4	7.9x	1.0x
Textile	1,161	1,153	+8.18	+0.71%	58	120,960	1.7%	601.9	11.7%	99.8x	0.8x	UNILEVERCL	46,740	1.3%	0.1	73.6x	25.6x
Paper & Printing	5,128	5,198	-70.48	-1.36%	6	23,168	0.3%	168.4	3.3%	NM	1.1x	ICB	41,628	1.2%	1.4	NM	1.0x
Tannery	2,076	2,062	+14.21	+0.69%	6	23,132	0.3%	120.6	2.4%	NM	1.7x	DUTCHBANGL	37,605	1.1%	1.5	10.0x	0.7x
Jute	13,114	13,033	+80.73	+0.62%	3	2,887	0.0%	22.9	0.4%	NM	NM	EBL	37,342	1.1%	46.3	5.3x	0.8x
Ceramics	403	399	+4.12	+1.03%	5	18,067	0.3%	23.2	0.5%	NM	1.2x	CITYBANK	36,661	1.0%	57.0	3.4x	0.7x
Miscellaneous	4,083	4,084	-0.68	-0.02%	15	221,740	3.1%	257.3	5.0%	87.8x	1.8x	PUBALIBANK	36,180	1.0%	1.3	4.9x	0.6x
Corporate Bond**	17,146	16,963	+182.76	+1.08%	16	37,854	0.5%	1.1	0.0%	NM	NM	PRIMEBANK	31,220	0.9%	23.6	3.7x	0.8x
Treasury Bond**	2,350	2,366	-16.11	-0.68%	235	3,575,344	50.2%	3.4	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
PLFSL	1.1	+10.0%	1.0	NM	NM	SQURPHARMA	108,958	7.7%	8.0x	1.4x	DOMINAGE	22.2	+6.2%	266.1	NM	1.3x
INTECH	31.2	+9.9%	44.5	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.9x	PRAGATIINS	86.1	+5.8%	188.4	15.5x	1.6x
MIDLANDBNK	22.3	+9.9%	156.1	23.0x	1.5x	BEXIMCO	69,463	4.9%	NM	1.3x	CVOPRL	196.9	-2.8%	165.3	51.5x	15.0x
ISLAMICFIN	6.8	+9.7%	1.2	NM	NM	BATBC	50,233	3.6%	11.3x	2.6x	FEKDIL	21.1	+2.9%	156.5	10.0x	1.0x
SIPLC	60.9	+8.4%	105.4	10.7x	2.3x	WALTONHIL	46,773	3.3%	12.7x	1.1x	MIDLANDBNK	22.3	+9.9%	156.1	23.0x	1.5x
PIONEERINS	53.9	+7.80%	75.1	12.5x	1.2x	BRACBANK	46,489	3.3%	9.7x	1.6x	RUPALILIFE	114.0	-1.6%	146.2	NM	NM
BIFC	3.1	+6.9%	0.0	NM	NM	GP	44,708	3.2%	13.5x	7.0x	SAPORTL	45.0	-1.1%	132.1	16.7x	1.3x
MEGHNAINS	28.2	+6.4%	33.9	22.2x	2.0x	RENATA	32,968	2.3%	19.1x	1.6x	SIMTEX	28.1	+5.2%	128.8	29.0x	1.3x
DOMINAGE	22.2	+6.2%	266.1	NM	1.3x	BXPHARMA	23,409	1.7%	7.9x	1.0x	SONALIPAPR	273.3	-3.2%	117.2	26.5x	1.6x
SAIHAMCOT	17.7	+6.0%	18.0	18.2x	0.5x	PUBALIBANK	22,905	1.6%	4.9x	0.6x	ROBI	29.9	+2.4%	115.3	18.0x	2.4x
						CITYBANK	21,020	1.5%	3.4x	0.7x						
						LHB	20,953	1.5%	16.3x	3.2x						
						OLYMPIC	20,496	1.5%	16.3x	2.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	ALARABANK	18,282	1.3%	36.2x	0.8x	MIDLANDBNK	21.3	21.3	7.0	3,810	81.15
BDLAMPS	150.5	-8.8%	15.0	NM	3.1x	BEACONPHAR	17,838	1.3%	30.1x	4.0x	DOMINAGE	21.1	20.2	6.0	635	13.14
FAREASTFIN	1.1	-8.3%	5.8	NM	NM	PRIMEBANK	16,142	1.1%	3.7x	0.8x	FINEFOODS	300.0	295.0	3.0	41	12.03
PREMIERLEA	1.2	-7.7%	0.3	NM	NM	ROBI	14,876	1.1%	18.0x	2.4x	PRAGATILIF	270.9	250.0	10.0	45	12.01
FASFIN	1.3	-7.1%	0.1	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	ASIATICLAB	63.0	60.7	4.0	136	8.48
ILFSL	1.3	-7.1%	0.6	NM	NM	NBL	13,055	0.9%	NM	NM	ACMELAB	69.4	69.3	3.0	101	6.98
SIBL	4.0	-7.0%	14.7	NM	0.3x	BSRMLTD	12,852	0.9%	5.0x	0.5x	CITYGENINS	67.2	67.1	2.0	95	6.39
AL-HAJTEX	126.4	-6.5%	26.3	NM	15.0x											
DESCO	19.7	-6.2%	1.7	NM	0.6x											
RAHIMAFOOD	148.3	-5.6%	87.8	NM	16.1x											
FAMILYTEX	1.7	-5.6%	0.9	NM	0.1x											
						* 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										

* 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
MIDLANDBNK	21.3	21.3	81.2	3,810	7
DOMINAGE	21.1	20.2	13.1	635	6
FINEFOODS	300.0	295.0	12.0	41	3
PRAGATILIF	270.9	250.0	12.0	45	10
ASIATICLAB	63.0	60.7	8.5	136	4
ACMELAB	69.4	69.3	7.0	101	3
CITYGENINS	67.2	67.1	6.4	95	2
SAPORTL	46.5	46.5	5.7	122	1
ORIONINFU	510.5	450.0	5.5	12	5
SIMTEX	27.0	25.7	4.1	156	5
GQBALLPEN	502.0	502.0	2.5	5	1
NHFIL	25.0	25.0	2.5	98	1
AMANFEED	23.8	23.8	1.8	74	1
KBPPWBIL	146.0	146.0	1.8	12	1
INTRACO	28.4	28.4	1.4	50	1
POPULARLIF	50.3	50.3	1.1	23	1
RAHIMAFOOD	155.0	155.0	1.1	7	1
SAIHAMCOT	16.8	16.8	0.8	50	1
CLICL	64.0	64.0	0.7	11	1
SONALIPAPR	282.0	282.0	0.6	2	1
LOVELLO	86.0	86.0	0.5	6	1
ACMEPL	16.3	16.3	0.5	31	1
Total			170.7		58

Important DSE News
BDLAMPS

The Board of Directors has recommended 10.00% Cash Dividend for the year ended June 30, 2025. Date of AGM: 11.12.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 03.11.2025. The Company has also reported EPS of Tk. (6.22), NAV per share of Tk. 39.93 and NOCFPS of Tk. (13.86) for the year ended June 30, 2025 as against Tk. (12.76) (restated), Tk. 48.69 (restated) and Tk. (18.87) (restated) respectively for the year ended June 30, 2024.

(Q1 Un-audited): EPS was Tk. (1.19) for July-September 2025 as against Tk. (5.59) for July-September 2024; NOCFPS was Tk. 5.14 for July-September 2025 as against Tk. (20.80) for July-September 2024. NAV per share was Tk. 48.17 as on September 30, 2025 and Tk. 46.74 as on September 30, 2024. EPS improved compared to the same period last year, driven by a 15.7% increase in revenue and a 4.08% rise in gross profit. However, higher finance costs and a sharp increase in customs duties from 10% to 28% contributed to a net loss. NOCFPS improved to positive mainly due to a decrease in payments to suppliers.

JHRML

The Board of Directors approved a further investment of Tk. 11.50 crore in its subsidiary, JMI Specialized Hospital Limited, to complete the ongoing project, purchase machinery, and support the company's working capital and other related requirements.

BATASHOE

The company has informed that Ms. Faria Yasmin has been appointed as the Managing Director of the company with effect from 20 November, 2025.

MONNOCERA

Ms. Afroza Khanam, a Sponsor Director of the company, has expressed her intention to transfer 26,00,000 shares of the Company to her spouse Mr. Moynul Islam (General Shareholder 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
APEXFOODS		0.0%	20.0%	Record Date	30-Oct-25
APEXSPINN		0.0%	20.0%	Record Date	30-Oct-25
BDLAMPS		0.0%	10.0%	Record Date	3-Nov-25
LOVELLO		5.0%	11.0%	Record Date	6-Nov-25
DESCO		0.0%	0.0%	Record Date	20-Nov-25

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