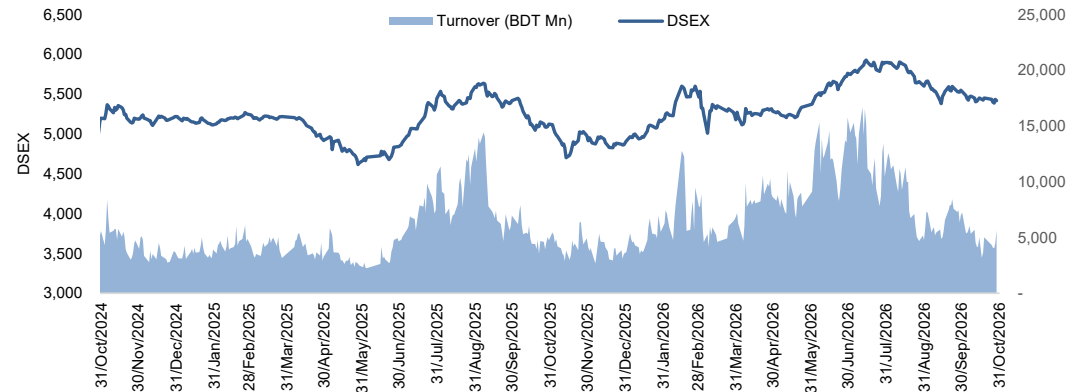


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.29%) lost 15.83 points and closed at 5,417.44. The blue-chip index DS30 (-0.45%), the Shariah-based index DSES (-0.36%), and the large-cap index CDSET (-0.32%) closed at 2,086.86, 1,050.67, and 1,101.49 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 2.99% followed by NBFi (-2.00%), Telecommunication (-0.45%), Engineering (-0.32%), Pharmaceutical (-0.31%), Bank (-0.16%), and Fuel & Power (+0.05%), respectively. Block trades contributed 19.9% of the overall market turnover. Prime Bank Ltd. (-1.7%) was the most traded share with a turnover of BDT 159 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,417.44	5,433.27	-15.83	-0.29%	+11.3%
DS30	2,086.86	2,096.26	-9.40	-0.45%	+12.6%
DSES	1,050.67	1,054.49	-3.82	-0.36%	+5.0%
CDSET	1,101.49	1,105.01	-3.52	-0.32%	+9.6%

	Advanced	Declined	Unchanged	Total
All Category	145	190	53	388
A Category (Equity)	81	94	20	195
B Category (Equity)	23	40	6	69
N Category (Equity)	0	1	0	1
Z Category (Equity)	41	55	27	123
Mutual Funds	15	3	14	32
Corporate Bonds	0	3	0	3
Treasury Bonds	0	4	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,744,763	6,734,781	+0.1%
	Mn USD	54,518	54,438	
Turnover	Mn BDT	5,646	4,410	+28.0%
	Mn USD	46	36	
Volume	Mn Shares	274	162	+68.9%
No. of Trade		156,936	153,850	+2.0%

* Average Interbank Exchange Rate is BDT 123.72 as of Oct 29, 2026

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Figure: Sectorial Turnover (BDT Mn)

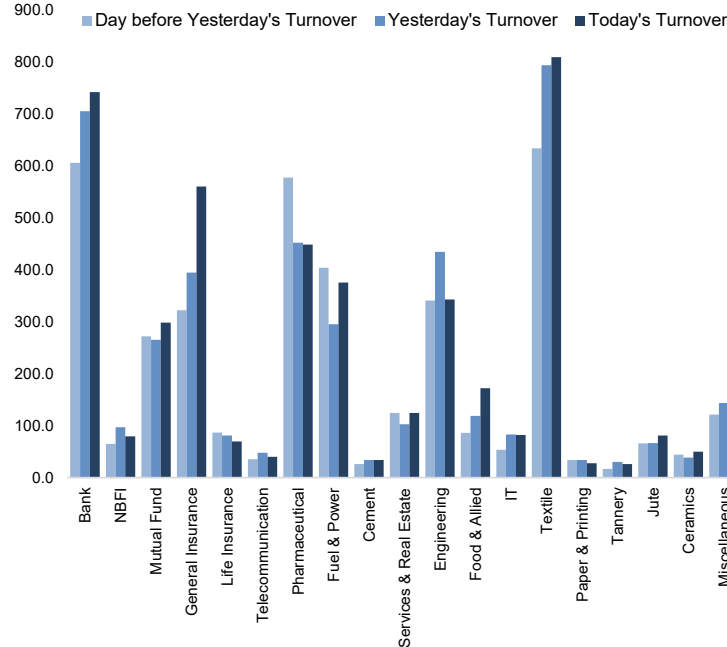
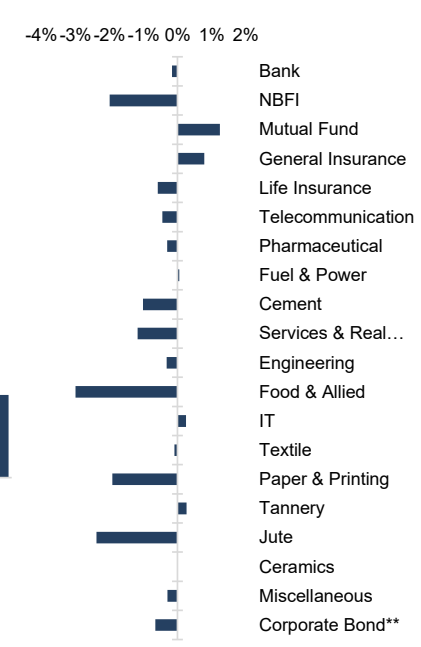


Figure: Sectorial Mcap Change



Market PE 11.8x

Market PB 1.5x

* Market P/E and P/BV calculation excludes
Mutual Fund, Life Insurance, selected NBFIs and Banks

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	1,568	1,570	-2.48	-0.16%	36	747,149	11.1%	741.0	16.4%	6.8x	0.7x	GP	320,426	9.4%	16.0	9.1x	6.5x
NBFI	975	995	-19.85	-2.00%	23	92,712	1.4%	79.1	1.7%	NM	1.0x	SQURPHARMA	193,690	5.7%	34.8	7.0x	1.2x
Mutual Fund	643	635	+7.94	+1.25%	35	29,092	0.4%	298.2	6.6%	NM	0.5x	ROBI	155,567	4.6%	23.1	14.7x	2.3x
General Insurance	4,285	4,251	+33.58	+0.79%	43	121,064	1.8%	559.7	12.4%	17.1x	1.7x	BRACBANK	154,546	4.5%	132.0	6.5x	1.2x
Life Insurance	1,641	1,650	-9.48	-0.57%	15	46,247	0.7%	69.6	1.5%	NM	NM	WALTONHIL	120,813	3.5%	3.2	10.7x	1.0x
Telecommunication	4,332	4,351	-19.43	-0.45%	3	502,646	7.4%	39.9	0.9%	10.4x	3.7x	BATBC	112,914	3.3%	65.3	30.0x	1.9x
Pharmaceutical	3,007	3,016	-9.20	-0.31%	34	567,578	8.4%	448.0	9.9%	9.8x	1.4x	MARICO	83,239	2.4%	11.3	7.4x	27.9x
Fuel & Power	1,093	1,092	+0.57	+0.05%	23	288,476	4.3%	375.1	8.3%	9.3x	0.6x	BERGERPBL	71,155	2.1%	12.6	14.7x	3.6x
Cement	1,834	1,852	-18.72	-1.01%	7	86,265	1.3%	33.6	0.7%	23.5x	1.9x	PUBALIBANK	66,998	2.0%	82.7	3.8x	0.7x
Services & Real Estate	1,057	1,069	-12.50	-1.17%	9	57,495	0.9%	124.1	2.7%	30.8x	0.4x	UPGDCL	65,042	1.9%	2.0	7.0x	1.3x
Engineering	2,459	2,467	-7.87	-0.32%	42	275,674	4.1%	342.3	7.6%	13.3x	0.8x	LHB	56,559	1.7%	17.9	13.0x	3.0x
Food & Allied	11,504	11,859	-355.01	-2.99%	21	210,019	3.1%	171.8	3.8%	41.2x	2.7x	CITYBANK	52,132	1.5%	62.2	3.4x	0.8x
IT	2,157	2,151	+5.43	+0.25%	11	28,560	0.4%	81.7	1.8%	45.4x	1.8x	RENATA	48,849	1.4%	12.4	13.4x	1.3x
Textile	1,314	1,315	-1.13	-0.09%	58	136,713	2.0%	808.5	17.9%	NM	0.9x	DUTCHBANGL	47,301	1.4%	15.0	3.5x	0.7x
Paper & Printing	4,171	4,252	-81.37	-1.91%	6	19,534	0.3%	27.4	0.6%	NM	1.9x	EBL	38,955	1.1%	29.2	4.3x	0.7x
Tannery	1,964	1,959	+5.17	+0.26%	6	22,806	0.3%	26.3	0.6%	NM	1.4x	UNILEVERCL	37,641	1.1%	2.4	61.5x	23.1x
Jute	12,574	12,880	-306.62	-2.38%	3	2,743	0.0%	80.7	1.8%	NM	1.7x	ISLAMIBANK	36,547	1.1%	1.4	NM	0.6x
Ceramics	398	398	-0.01	-0.00%	5	18,002	0.3%	50.1	1.1%	NM	1.2x	PRIMEBANK	35,827	1.1%	159.4	3.7x	0.7x
Miscellaneous	2,385	2,392	-7.02	-0.29%	15	129,518	1.9%	159.1	3.5%	34.7x	1.0x	POWERGRID	35,273	1.0%	4.8	8.7x	0.3x
Corporate Bond**	19,141	19,266	-125.13	-0.65%	16	42,296	0.6%	5.4	0.1%	NM	NM	BSRMSTEEL	34,061	1.0%	19.1	4.8x	0.9x
Treasury Bond**	2,166	2,149	+16.92	+0.79%	231	3,324,633	49.3%	1.3	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
UNIONCAP	4.5	+9.8%	1.8	NM	NM	SQURPHARMA	108,176	7.6%	7.0x	1.2x	PRIMEBANK	29.4	-1.7%	159.4	3.7x	0.7x
PF1STMF	11.7	+9.3%	47.4	NM	1.3x	BRACBANK	83,192	5.8%	6.5x	1.2x	BRACBANK	67.5	-1.0%	132.0	6.5x	1.2x
ISNLTD	40.3	+8.0%	6.6	NM	21.1x	PUBALIBANK	45,646	3.2%	3.8x	0.7x	MATINSPINN	83.4	+3.3%	107.8	13.1x	1.2x
1STPRIMFMF	39.1	+8.0%	83.8	NM	4.0x	BXPHARMA	44,791	3.1%	7.1x	1.0x	BPPL	19.5	-7.1%	100.6	5.6x	0.6x
GBBPOWER	12.8	+6.7%	15.3	NM	0.6x	ISLAMIBANK	36,481	2.6%	NM	0.6x	SAIHAMTEX	44.5	-1.3%	96.3	NM	1.0x
MBL1STMF	9.6	+6.67%	44.1	NM	1.1x	CITYBANK	36,300	2.5%	3.4x	0.8x	SAPORTL	59.4	-2.9%	92.9	22.8x	1.6x
CAPMIBBLMF	16.7	+6.4%	20.3	NM	2x	WALTONHIL	34,927	2.4%	10.7x	1.0x	SPCL	55.9	-0.7%	89.6	9.3x	1.3x
SILVAPHL	10.3	+6.2%	9.5	NM	0.7x	GP	32,043	2.2%	9.1x	6.5x	1STPRIMFMF	39.1	+8.0%	83.8	NM	4.0x
PUBALIBANK	42.9	+5.9%	82.7	3.8x	0.7x	BATBC	29,866	2.1%	30.0x	1.9x	PUBALIBANK	42.9	+5.9%	82.7	3.8x	0.7x
SICL	32.3	+5.9%	9.4	NM	2.2x	EBL	27,487	1.9%	4.3x	0.7x	SONALIANSH	203.5	-2.8%	80.7	56.4x	0.9x
						RENATA	23,794	1.7%	13.4x	1.3x						
						PRIMEBANK	23,094	1.6%	3.7x	0.7x						
						LHB	21,119	1.5%	13.0x	3.0x						
						UCB	18,818	1.3%	3.9x	0.3x						
						UTTARABANK	17,913	1.3%	NM	0.7x						
						OLYMPIC	16,890	1.2%	13.5x	1.9x						
						ROBI	15,557	1.1%	14.7x	2.3x						
						BSRMLTD	15,063	1.1%	4.1x	0.5x						
						JAMUNABANK	13,911	1.0%	3.4x	0.8x						
						BEACONPHAR	12,878	0.9%	11.0x	2.6x						

*. Bank and NBFI sector PE calculation methodology has been modified.
** 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
UCB	10.1	10.1	998.5	98,861	4
CITYGENINS	128.8	125.0	40.5	324	9
FINEFOODS	415.1	415.0	14.3	35	5
GQBALLPEN	600.0	560.0	13.5	24	4
APEXSPINN	400.0	400.0	9.0	23	3
MARICO	2,640.0	2,640.0	6.6	3	1
IFIC	5.0	5.0	4.9	980	1
CAPMIBLMF	16.1	15.8	4.2	262	4
SAIHAMTEX	47.0	47.0	3.9	82	2
DUTCHBANGL	49.0	49.0	2.6	54	1
MTB	12.9	12.8	2.6	200	2
CONFIDCEM	57.7	57.7	2.3	40	1
1STPRIMFMF	35.0	35.0	1.8	50	1
MALEKSPIN	47.7	47.7	1.7	35	1
SQURPHARMA	218.9	218.9	1.5	7	1
PROVATIINS	51.5	51.5	1.5	29	1
SONALILIFE	96.0	96.0	1.4	15	1
SONALIANS	215.0	215.0	1.4	7	1
SONARBAINS	43.9	43.9	1.3	30	1
SONARGAON	110.0	110.0	1.1	10	1
NITOLINS	52.7	52.7	1.1	20	1
DHAKABANK	12.2	12.2	0.8	67	1
Total			1,123.4		59

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EHL		0.0%	20.0%	Record Date	29-Oct-26
OLYMPIC		0.0%	35.0%	Record Date	4-Nov-26
GQBALLPEN		0.0%	12.5%	Record Date	4-Nov-26
ITC		0.0%	10.0%	Record Date	4-Nov-26
SIMTEX		0.0%	9.7%	Record Date	5-Nov-26
BDLAMPS		0.0%	10.0%	Record Date	9-Nov-26
APEXTANRY		0.0%	0.0%	Record Date	10-Nov-26
BEACONPHAR		0.0%	11.0%	Record Date	10-Nov-26
FINEFOODS		0.0%	35.6%	Record Date	12-Nov-26
DOREENPWR		0.0%	15.0%	Record Date	12-Nov-26
FEKDIL		0.0%	6.0%	Record Date	12-Nov-26
MATINSPINN		10.0%	45.0%	Record Date	12-Nov-26
LHB		0.0%	10.0%	Record Date	12-Nov-26
NAHEEACP		0.0%	2.3%	Record Date	15-Nov-26
BSRMSTEEL		0.0%	60.0%	Record Date	15-Nov-26
BSRMLTD		0.0%	55.0%	Record Date	15-Nov-26
RENATA		0.0%	55.0%	Record Date	15-Nov-26

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Important DSE News
ACI

The Board of Directors has recommended 15% Cash Dividend and 5% Stock Dividend for the year ended June 30, 2026. Date of AGM: 28.12.2026, Time: 11:30 a.m., Venue: Through Digital System. Record Date: 19.11.2026. The Company has also reported Consolidated EPS of Tk. (8.59), Consolidated NAV per share of Tk. 82.67 and Consolidated NOCFPS of Tk. (58.53) for the year ended June 30, 2026 as against Tk. (7.40), Tk. 91.64 and Tk. (51.63) respectively for the year ended June 30, 2025.

The company has informed that the Board of Directors at its meeting held on 28 October 2026 approved the formation of a new subsidiary company under the title of "ACI Renewable Energy Limited" having an authorized capital of BDT 50 (Fifty Crore) and a paid up capital of BDT 10 (Ten Crore) wherein Advanced Chemical Industries PLC shall hold 85% shares, subject to the approval of the concerned authority.

ICB

The Board of Directors has recommended No Dividend for the year ended June 30, 2026. Date of AGM: 05.12.2026, Time: 11:00 AM, Venue/Mode: Digital Platform. Record Date: 18.11.2026. The Company has also reported Consolidated EPS of Tk. (7.52), Consolidated NAV per share of Tk. 30.26 and Consolidated NOCFPS of Tk. 8.96 for the year ended June 30, 2026 as against EPS of Tk. (14.00), NAV per share of Tk. 37.45 and NOCFPS of Tk. 10.31 for the year ended June 30, 2025.

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., October 29, 2026 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.

BERGERPBL

(Q2 Un-audited): Consolidated Basic and Diluted EPS was Tk. 15.97 for July-September 2026 as against Tk. 13.08 for July-September 2025; Consolidated Basic and Diluted EPS was Tk. 52.79 for April-September 2026 as against Tk. 31.14 for April-September 2025. Consolidated NOCFPS was Tk. 25.46 for April-September 2026 as against Tk. 6.24 for April-September 2025. Consolidated NAV per share was Tk. 400.52 as on September 30, 2026 and Tk. 400.24 as on March 31, 2026.

GREENDEL

(Q3 Un-audited): Consolidated EPS was Tk. 0.94 for July-September 2026 as against Tk. 0.81 for July-September 2025; Consolidated EPS was Tk. 3.53 for January-September 2026 as against Tk. 3.63 for January-September 2025. Consolidated NOCFPS was Tk. 2.78 for January-September 2026 as against Tk. 6.25 for January-September 2025. Consolidated NAV per share was Tk. 74.89 as on September 30, 2026 and Tk. 70.53 as on December 31, 2025.

PRAGATIINS

(Q3 Un-audited): EPS was Tk. 0.95 for July-September 2026 as against Tk. 0.81 (restated) for July-September 2025; EPS was Tk. 4.05 for January-September 2026 as against Tk. 3.07 (restated) for January-September 2025. NOCFPS was Tk. 4.63 for January-September 2026 as against Tk. (2.54) (restated) for January-September 2025. NAV per share was Tk. 57.64 as on September 30, 2026 and Tk. 55.69 (restated) as on December 31, 2025.

PUBALIBANK

(Q3 Un-audited): Consolidated EPS was Tk. 5.76 for July-September 2026 as against Tk. 2.13 (restated) for July-September 2025; Consolidated EPS was Tk. 10.15 for January-September 2026 as against Tk. 5.83 (restated) for January-September 2025. Consolidated NOCFPS was Tk. 73.82 for January-September 2026 as against Tk. 57.20 (restated) for January-September 2025. Consolidated NAV per share was Tk. 57.56 as on September 30, 2026 and Tk. 45.27 (restated) as on December 31, 2025.

BRACBANK

(Q3 Un-audited): Consolidated EPS was Tk. 2.63 for July-September 2026 as against Tk. 2.20 for July-September 2025; Consolidated EPS was Tk. 7.70 for January-September 2026 as against Tk. 5.29 for January-September 2025. Consolidated NOCFPS was Tk. 53.74 for January-September 2026 as against Tk. 54.81 for January-September 2025. Consolidated NAV per share was Tk. 56.40 as on September 30, 2026 and Tk. 44.84 as on December 31, 2025.

BANKASIA

(Q3 Un-audited): Consolidated EPS was Tk. 1.47 for July-September 2026 as against Tk. 0.27 for July-September 2025; Consolidated EPS was Tk. 3.24 for January-September 2026 as against Tk. 2.37 for January-September 2025. Consolidated NOCFPS was Tk. 66.13 for January-September 2026 as against Tk. 38.17 for January-September 2025. Consolidated NAV per share was Tk. 28.46 as on September 30, 2026 and Tk. 26.99 as on September 30, 2025.

JAMUNABANK

(Q3 Un-audited): Consolidated EPS was Tk. 1.31 for July-September 2026 as against Tk. 1.13 for July-September 2025; Consolidated EPS was Tk. 5.34 for January-September 2026 as against Tk. 4.44 for January-September 2025. Consolidated NOCFPS was Tk. 75.89 for January-September 2026 as against Tk. 76.85 for January-September 2025. Consolidated NAV per share was Tk. 29.94 as on September 30, 2026 and Tk. 27.43 as on December 31, 2025.

ROBI

(Q3 Un-audited): Consolidated EPS was Tk. 0.48 for July-September 2026 as against Tk. 0.46 for July-September 2025; Consolidated EPS was Tk. 1.43 for January-September 2026 as against Tk. 1.19 for January-September 2025. Consolidated NOCFPS was Tk. 6.19 for January-September 2026 as against Tk. 6.68 for January-September 2025. Consolidated NAV per share was Tk. 13.01 as on September 30, 2026 and Tk. 12.77 as on September 30, 2025.

BXPHARMA

The Board of Directors has recommended 60% Cash Dividend for the year ended June 30, 2026. The convening of the 50th Annual General Meeting (AGM) of the Company, relating to the financial year 2025-26, is dependent upon the holding of the 49th AGM, relating to the financial year 2024-25. An application seeking condonation of the delay in holding the 49th AGM (Company Matter No. 1112 of 2026) is pending before the Hon'ble High Court Division of the Supreme Court of Bangladesh. Record Date: 19.11.2026. The Company has also reported Consolidated EPS of Tk. 20.17, Consolidated NAV per share of Tk. 139.18 and Consolidated NOCFPS of Tk. 21.33 for the year ended June 30, 2026 as against Tk. 15.56, Tk. 119.04 and Tk. 16.19 respectively for the year ended June 30, 2025.

BATBC

(Q3 Un-audited): EPS was Tk. 1.85 for July-September 2026 as against Tk. 5.65 for July-September 2025; EPS was Tk. 9.50 for January-September 2026 as against Tk. 13.34 for January-September 2025. NOCFPS was Tk. 42.05 for January-September 2026 as against Tk. (21.70) for January-September 2025. NAV per share was Tk. 108.97 as on September 30, 2026 and Tk. 102.50 as on December 31, 2025.

EBL

(Q3 Un-audited): Consolidated EPS was Tk. 1.43 for July-September 2026 as against Tk. 1.42 (restated) for July-September 2025; Consolidated EPS was Tk. 4.10 for January-September 2026 as against Tk. 3.56 (restated) for January-September 2025. Consolidated NOCFPS was Tk. 11.25 for January-September 2026 as against Tk. 19.36 (restated) for January-September 2025. Consolidated NAV per share was Tk. 32.63 as on September 30, 2026 and Tk. 30.47 (restated) as on December 31, 2025.

MARICO

The Board of Directors has declared interim cash dividend of 350% i.e. BDT 35/- per share on face value of BDT 10/- based on Audited Financial Statements as at and for the six-month period ended September 30, 2026. Record Date: November 24, 2026.

(Q2 Audited): EPS was Tk. 48.70 for July-September 2026 as against Tk. 48.75 for July-September 2025; EPS was Tk. 102.82 for April-September 2026 as against Tk. 110.52 for April-September 2025. NOCFPS was Tk. 58.51 for April-September 2026 as against Tk. 110.68 for April-September 2025. NAV per share was Tk. 94.85 as on September 30, 2026 and Tk. 92.02 as on March 31, 2026.

BANKASIA

The company has informed that the Board of Directors in its meeting held on 28 October 2026 has approved the proposal for establishing a wholly owned subsidiary of the Bank in Hong Kong with an initial capital injection of HK\$ 6 million over three years to commence operations under a Money Lending License and to expand its international banking operations, strengthen cross-border trade finance business, and capitalize on growing trade and investment between Bangladesh and China, subject to obtaining the necessary approval from Bangladesh Bank and completing the applicable incorporation and licensing formalities in Hong Kong.

PRIMEBANK

(Q3 Un-audited): Consolidated EPS was Tk. 2.07 for July-September 2026 as against Tk. 1.80 (restated) for July-September 2025; Consolidated EPS was Tk. 5.62 for January-September 2026 as against Tk. 5.16 (restated) for January-September 2025. Consolidated NOCFPS was Tk. 19.66 for January-September 2026 as against Tk. 9.47 (restated) for January-September 2025. Consolidated NAV per share was Tk. 41.09 as on September 30, 2026 and Tk. 36.97 (restated) as on September 30, 2025.

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