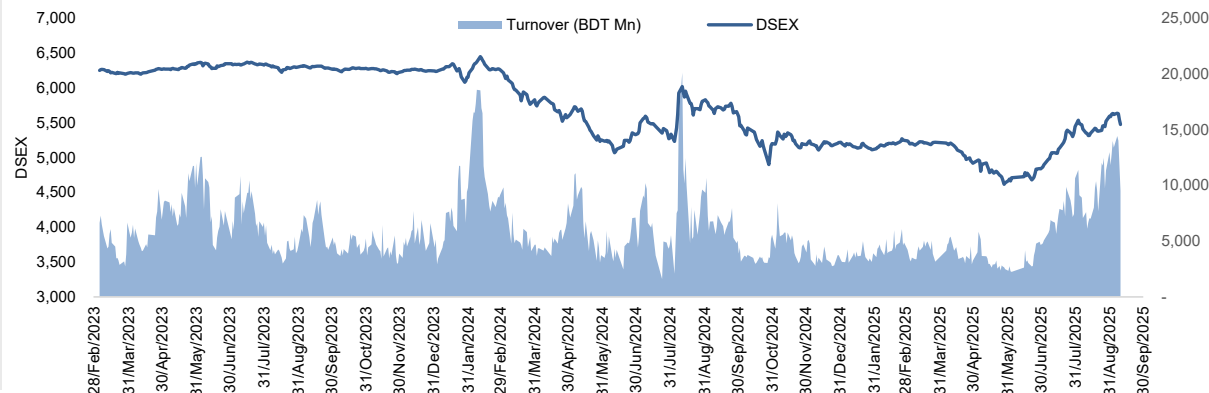


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.18%) lost 65.1 points and closed at 5,473.15. The blue-chip index DS30 (-1.06%), the Shariah-based index DSES (-1.31%), and the large-cap index CDSET (-0.80%) closed at 2,129.90, 1,188.23, and 1,108.86 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 3.61% followed by Fuel & Power (-1.94%), Engineering (-1.57%), Telecommunication (-1.38%), Food & Allied (-0.71%), Pharmaceutical (-0.51%), and Bank (-0.45%), respectively. Block trades contributed 4.0% of the overall market turnover. Robi Axiata PLC (-4.1%) was the most traded share with a turnover of BDT 424 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 5,473.15 | 5,538.25 | -65.10 | -1.18% | +4.9% |
| DS30 | 2,129.90 | 2,152.83 | -22.93 | -1.06% | +9.8% |
| DSES | 1,188.23 | 1,203.98 | -15.76 | -1.31% | +1.7% |
| CDSET | 1,108.86 | 1,117.82 | -8.96 | -0.80% | +4.0% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 43 | 313 | 41 | 397 |
| A Category (Equity) | 20 | 176 | 23 | 219 |
| B Category (Equity) | 11 | 68 | 2 | 81 |
| N Category (Equity) | 1 | 0 | 0 | 1 |
| Z Category (Equity) | 11 | 69 | 16 | 96 |
| Mutual Funds | 1 | 21 | 12 | 34 |
| Corporate Bonds | 1 | 1 | 1 | 3 |
| Treasury Bonds | 0 | 3 | 0 | 3 |

* Based on Traded Scripts

| | | Today | Last Day | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap | Mn BDT | 7,209,898 | 7,260,942 | -0.7% |
| | Mn USD | 59,219 | 59,638 | |
| Turnover | Mn BDT | 9,500 | 11,773 | -19.3% |
| | Mn USD | 78 | 97 | |
| Volume | Mn Shares | 282 | 377 | -25.1% |
| No. of Trade | | 256,689 | 306,034 | -16.1% |

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 10, 2025

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Figure: Sectorial Turnover (BDT Mn)

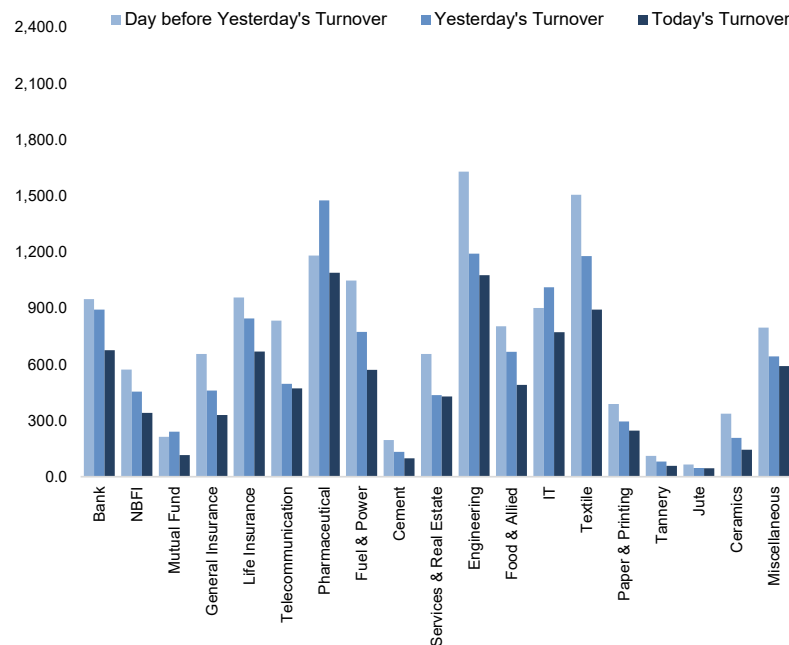
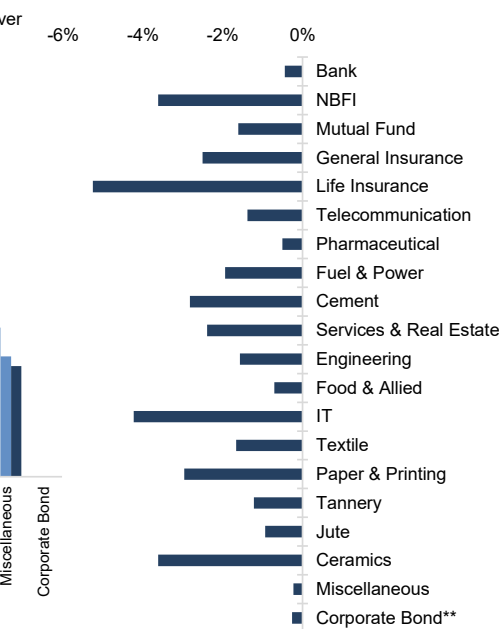


Figure: Sectorial Mcap Change



Market PE 16.6x

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 | 1,501 | 1,507 | -6.71 | -0.45% | 36 | 710,035 | 9.9% | 675.9 | 7.4% | NM | 0.8x | GP | 405,495 | 11.0% | 11.4 | 13.8x | 7.1x |
| NBFI | 1,150 | 1,193 | -43.13 | -3.61% | 23 | 109,601 | 1.5% | 341.7 | 3.7% | NM | NM | SQURPHARMA | 194,487 | 5.3% | 31.3 | 8.3x | 1.4x |
| Mutual Fund | 568 | 577 | -9.28 | -1.61% | 37 | 27,228 | 0.4% | 115.9 | 1.3% | NM | 0.5x | ROBI | 159,233 | 4.3% | 424.2 | 18.3x | 2.5x |
| General Insurance | 2,926 | 3,001 | -75.13 | -2.50% | 43 | 83,498 | 1.2% | 328.9 | 3.6% | 14.0x | 1.3x | BATBC | 154,926 | 4.2% | 25.3 | 12.5x | 2.9x |
| Life Insurance | 2,125 | 2,243 | -117.80 | -5.25% | 15 | 56,515 | 0.8% | 668.9 | 7.3% | NM | NM | BRACBANK | 143,148 | 3.9% | 105.5 | 10.1x | 1.7x |
| Telecommunication | 5,042 | 5,113 | -70.53 | -1.38% | 3 | 591,269 | 8.2% | 471.7 | 5.2% | 15.0x | 4.3x | WALTONHIL | 137,742 | 3.7% | 56.7 | 13.3x | 1.1x |
| Pharmaceutical | 3,138 | 3,154 | -15.99 | -0.51% | 34 | 594,894 | 8.3% | 1,089.6 | 11.9% | 13.7x | 1.6x | BEXIMCO | 103,850 | 2.8% | 0.0 | NM | 1.3x |
| Fuel & Power | 1,177 | 1,201 | -23.25 | -1.94% | 23 | 311,868 | 4.3% | 570.8 | 6.3% | 19.7x | 0.7x | MARICO | 91,419 | 2.5% | 13.6 | 14.9x | 27.4x |
| Cement | 2,040 | 2,099 | -59.19 | -2.82% | 7 | 97,195 | 1.4% | 98.5 | 1.1% | 22.4x | 2.1x | UPGDCL | 82,143 | 2.2% | 7.5 | 7.0x | 2.0x |
| Services & Real Estate | 1,102 | 1,129 | -27.02 | -2.39% | 9 | 60,602 | 0.8% | 428.3 | 4.7% | 26.8x | 0.5x | BERGERPBL | 71,827 | 2.0% | 10.1 | 20.4x | 4.2x |
| Engineering | 2,589 | 2,630 | -41.24 | -1.57% | 42 | 292,057 | 4.1% | 1,076.7 | 11.8% | 15.6x | 0.9x | LHB | 63,179 | 1.7% | 60.6 | 16.8x | 3.3x |
| Food & Allied | 14,932 | 15,038 | -106.02 | -0.71% | 21 | 273,211 | 3.8% | 490.2 | 5.4% | 20.7x | 4.3x | RENATA | 56,889 | 1.5% | 29.4 | 20.2x | 1.6x |
| IT | 2,134 | 2,228 | -94.22 | -4.23% | 11 | 28,142 | 0.4% | 771.2 | 8.5% | 23.7x | 1.8x | BXPHARMA | 55,273 | 1.5% | 39.7 | 8.6x | 1.1x |
| Textile | 1,214 | 1,235 | -20.49 | -1.66% | 58 | 126,443 | 1.8% | 891.9 | 9.8% | NM | 0.8x | ICB | 48,306 | 1.3% | 24.3 | NM | 1.1x |
| Paper & Printing | 5,411 | 5,577 | -165.17 | -2.96% | 6 | 24,448 | 0.3% | 246.0 | 2.7% | NM | 1.2x | UNILEVERCL | 47,336 | 1.3% | 0.3 | 74.5x | 26.0x |
| Tannery | 2,116 | 2,142 | -26.05 | -1.22% | 6 | 23,577 | 0.3% | 57.5 | 0.6% | NM | 1.8x | EBL | 40,534 | 1.1% | 36.6 | 5.8x | 0.9x |
| Jute | 13,866 | 13,997 | -130.67 | -0.93% | 3 | 3,052 | 0.0% | 45.4 | 0.5% | NM | NM | DUTCHBANGL | 39,828 | 1.1% | 7.0 | 10.6x | 0.8x |
| Ceramics | 431 | 447 | -16.18 | -3.62% | 5 | 19,341 | 0.3% | 144.4 | 1.6% | NM | 1.2x | CITYBANK | 39,552 | 1.1% | 138.0 | 3.6x | 0.7x |
| Miscellaneous | 4,182 | 4,192 | -9.59 | -0.23% | 15 | 227,109 | 3.2% | 591.2 | 6.5% | 90.0x | 1.8x | PUBALIBANK | 37,872 | 1.0% | 7.4 | 5.2x | 0.7x |
| Corporate Bond** | 16,443 | 16,486 | -43.23 | -0.26% | 16 | 36,302 | 0.5% | 1.0 | 0.0% | NM | NM | PRIMEBANK | 32,961 | 0.9% | 4.1 | 3.9x | 0.8x |
| Treasury Bond** | 2,269 | 2,270 | -1.52 | -0.07% | 235 | 3,495,525 | 48.6% | 13.2 | 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 |
|-----------------|-------------------|--------|-------------------|-------|-------|--|--------------------------|----------------------------|-------|------|-------------------|---------------------|---------------------|-------------------|-----------------|-------------------|
| TAMIJTEX | 156.4 | +10.0% | 53.5 | 23.1x | 1.6x | SQURPHARMA | 108,958 | 7.7% | 8.3x | 1.4x | ROBI | 30.4 | -4.1% | 424.2 | 18.3x | 2.5x |
| JUTESPINN | 223.1 | +8.7% | 3.2 | NM | NM | ISLAMIBANK | 74,730 | 5.3% | NM | 0.9x | ORIONINFU | 519.3 | +2.7% | 424.0 | NM | 33.1x |
| PRIMEFIN | 3.0 | +7.1% | 2.6 | NM | 0.4x | BEXIMCO | 69,463 | 4.9% | NM | 1.3x | KBPWPBIL | 151.7 | +2.6% | 311.2 | NM | 12.7x |
| FINEFOODS | 307.6 | +5.2% | 60.3 | 69.3x | 21.1x | BATBC | 50,233 | 3.6% | 12.5x | 2.9x | ISNLTD | 116.8 | -2.0% | 203.9 | NM | 42.5x |
| CVOPRL | 165.5 | +5.1% | 135.9 | 61.8x | 13.9x | WALTONHIL | 46,773 | 3.3% | 13.3x | 1.1x | DOMINAGE | 20.9 | +4.0% | 198.6 | NM | 1.2x |
| DESHBANDHU | 21.7 | +4.83% | 65.8 | NM | 1.3x | BRACBANK | 46,489 | 3.3% | 10.1x | 1.7x | EGEN | 29.6 | -8.1% | 158.6 | 37.0x | 1.3x |
| GIB | 2.3 | +4.5% | 1.0 | NM | NM | GP | 44,708 | 3.2% | 13.8x | 7.1x | RUPALILIFE | 111.5 | -9.3% | 158.4 | NM | NM |
| BBSCABLES | 22.5 | +4.2% | 91.5 | NM | 0.7x | RENATA | 32,968 | 2.3% | 20.2x | 1.6x | PRAGATILIF | 195.2 | -6.6% | 145.9 | NM | NM |
| GQBALLPEN | 449.8 | +4.0% | 18.7 | NM | 3.3x | BXPHARMA | 23,409 | 1.7% | 8.6x | 1.1x | INTECH | 40.3 | -8.6% | 140.3 | NM | NM |
| DOMINAGE | 20.9 | +4.0% | 198.6 | NM | 1.2x | PUBALIBANK | 22,905 | 1.6% | 5.2x | 0.7x | CITYBANK | 26.0 | -0.4% | 138.0 | 3.6x | 0.7x |
| | | | | | | | | | | | | | | | | |
| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB | CITYBANK | 21,020 | 1.5% | 3.6x | 0.7x | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
| TILIL | 67.8 | -10.0% | 118.8 | 11.6x | NM | LHB | 20,953 | 1.5% | 16.8x | 3.3x | ORIONINFU | 491.1 | 479.0 | 8.0 | 261 | 126.40 |
| RUPALILIFE | 111.5 | -9.3% | 158.4 | NM | NM | OLYMPIC | 20,496 | 1.5% | 17.4x | 2.7x | KBPWPBIL | 159.0 | 135.0 | 5.0 | 318 | 43.79 |
| GENNEXT | 3.1 | -8.8% | 2.1 | NM | 0.3x | ALARABANK | 18,282 | 1.3% | 36.9x | 0.8x | ROBI | 32.5 | 32.5 | 1.0 | 1,111 | 36.11 |
| INTECH | 40.3 | -8.6% | 140.3 | NM | NM | BEACONPHAR | 17,838 | 1.3% | 33.7x | 4.5x | SEAPEARL | 58.5 | 58.5 | 7.0 | 473 | 27.67 |
| EGEN | 29.6 | -8.1% | 158.6 | 37.0x | 1.3x | PRIMEBANK | 16,142 | 1.1% | 3.9x | 0.8x | SUNLIFEINS | 68.8 | 63.5 | 3.0 | 362 | 24.84 |
| PRIMELIFE | 43.9 | -7.6% | 10.3 | NM | NM | ROBI | 14,876 | 1.1% | 18.3x | 2.5x | FINEFOODS | 300.0 | 282.0 | 11.0 | 85 | 24.33 |
| DULAMACOT | 118.1 | -6.7% | 3.1 | NM | NM | UTTARABANK | 13,699 | 1.0% | NM | 0.8x | GP | 300.0 | 300.0 | 1.0 | 50 | 15.00 |
| AAMRATECH | 14.1 | -6.6% | 1.9 | NM | 0.7x | NBL | 13,055 | 0.9% | NM | NM | LHB | 59.0 | 59.0 | 1.0 | 200 | 11.80 |
| BDCOM | 29.7 | -6.6% | 56.5 | 36.1x | 1.9x | BSRMLTD | 12,852 | 0.9% | 5.2x | 0.6x | PTL | 52.0 | 52.0 | 1.0 | 200 | 10.40 |
| PRAGATILIF | 195.2 | -6.6% | 145.9 | NM | NM | * 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 |
|--------------|---------------------|---------------|-------------------|-----------------|--------------|
| ORIONINFU | 491.1 | 479.0 | 126.4 | 261 | 8 |
| KBPPWBIL | 159.0 | 135.0 | 43.8 | 318 | 5 |
| ROBI | 32.5 | 32.5 | 36.1 | 1,111 | 1 |
| SEAPEARL | 58.5 | 58.5 | 27.7 | 473 | 7 |
| SUNLIFEINS | 68.8 | 63.5 | 24.8 | 362 | 3 |
| FINEFOODS | 300.0 | 282.0 | 24.3 | 85 | 11 |
| GP | 300.0 | 300.0 | 15.0 | 50 | 1 |
| LHB | 59.0 | 59.0 | 11.8 | 200 | 1 |
| PTL | 52.0 | 52.0 | 10.4 | 200 | 1 |
| BATBC | 287.0 | 287.0 | 9.6 | 34 | 1 |
| SQURPHARMA | 227.0 | 227.0 | 5.3 | 23 | 1 |
| CLICL | 62.5 | 59.0 | 4.3 | 70 | 4 |
| BPML | 32.7 | 32.7 | 2.9 | 89 | 1 |
| CITYBANK | 28.6 | 28.6 | 2.9 | 100 | 1 |
| CITYGENINS | 59.0 | 59.0 | 2.7 | 45 | 1 |
| GQBALLPEN | 395.0 | 395.0 | 2.4 | 6 | 1 |
| DSSL | 11.3 | 11.3 | 2.3 | 200 | 1 |
| IPDC | 23.7 | 22.7 | 2.1 | 89 | 2 |
| CENTRALINS | 47.5 | 44.9 | 2.0 | 43 | 2 |
| PRAGATIINS | 63.9 | 63.9 | 1.9 | 30 | 1 |
| ISNLTD | 109.0 | 109.0 | 1.9 | 17 | 1 |
| EXIM1STMF | 4.2 | 4.2 | 1.9 | 448 | 2 |
| Total | | | 380.7 | | 80 |

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|------------|-------------|----------|--------|-------------|-----------|
| | | Stock | Cash | | |
| PREMIERBAN | | 0.0% | 0.0% | Record Date | 17-Sep-25 |
| ISLAMIBANK | | 0.0% | 0.0% | Record Date | 23-Sep-25 |
| WALTONHIL | | 10.0% | 175.0% | Record Date | 28-Sep-25 |
| EHL | | 0.0% | 25.0% | Record Date | 5-Oct-25 |
| GSPFINANCE | | 0.0% | 0.0% | Record Date | 14-Oct-25 |
| RUPALILIFE | | 0.0% | 10.0% | Record Date | 3-Nov-25 |

Important DSE News

EHL

The Board of Directors has recommended 25% Cash Dividend for the year ended June 30, 2025. Date of AGM: 30.10.2025, Time: 10:30 AM, Venue: Digital Platform through the link: <https://ehl.bdvirtualagm.com>. Record Date: 05.10.2025. The Company has reported EPS of Tk. 8.27, NAV per share of Tk. 89.99 and NOCFPS of Tk. 2.90 for the year ended June 30, 2025 as against Tk. 6.04, Tk. 83.62 and Tk. (10.42) respectively for the year ended June 30, 2024.

GENEXIL

The Board of Directors of the company has appointed Mr. Riaz Uddin Bhuiya as the company secretary of the company with effect from October 01, 2025.

YPL

The company has informed that the following sponsor shareholders of Yeakin Polymer Ltd. have jointly applied, along with FCS Holdings Ltd., to the Bangladesh Securities and Exchange Commission (BSEC) seeking approval for the transfer of their sponsor shares in favour of FCS Holdings Ltd.: Mr. Chakladar Rezaunul Alam (Chairman)-7,107,562 shares, Kapita Packaging Solutions Ltd. (Director)- 7,269,950 shares and Mr. Didarul Alam (Director)-1,475,481 shares. Total: 15,852,993 shares (21.50% of total shares).

RENATA

The company has informed that it has successfully launched its first product in the Canadian pharmaceutical market. The product, Desogestrel/Ethinylestradiol (0.15 mg/0.03 mg) tablets, is being commercialized under the brand names Miley 21 and Miley 28 through a strategic partnership with Ambicare Pharmaceuticals Inc., a well-established Canadian generic pharmaceutical company.

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