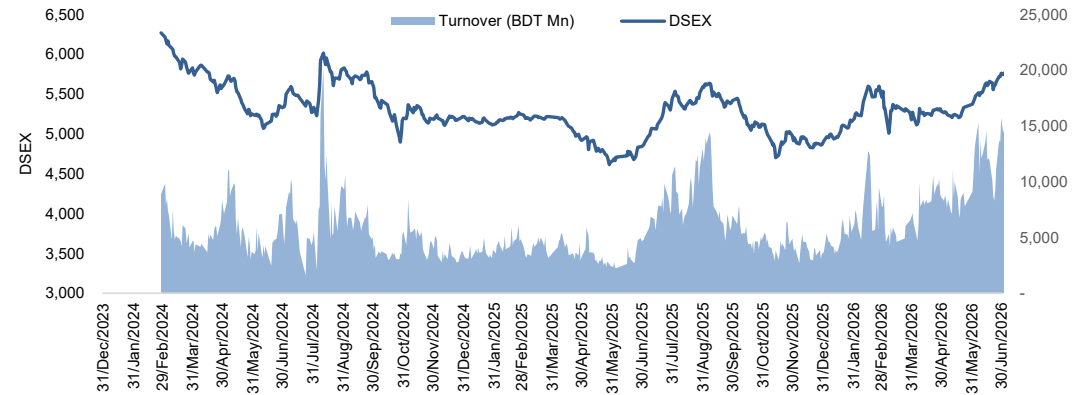


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.41%) lost 22.71 points and closed at 5,515.17. The blue-chip index DS30 (-0.37%), the Shariah-based index DSES (-0.52%), and the large-cap index CDSET (-0.36%) closed at 2,095.31, 1,105.06, and 1,103.36 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.30% followed by Food & Allied (-0.65%), Telecommunication (-0.60%), Fuel & Power (-0.37%), Pharmaceutical (-0.34%), Engineering (-0.13%), and Bank (-0.11%), respectively. Block trades contributed 6.8% of the overall market turnover. Envoy Textiles Limited (+0.5%) was the most traded share with a turnover of BDT 202 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,515.17	5,537.88	-22.71	-0.41%	+13.4%
DS30	2,095.31	2,103.03	-7.72	-0.37%	+13.0%
DSES	1,105.06	1,110.82	-5.76	-0.52%	+10.4%
CDSET	1,103.36	1,107.33	-3.97	-0.36%	+9.8%

	Advanced	Declined	Unchanged	Total
All Category	103	230	54	387
A Category (Equity)	67	107	20	194
B Category (Equity)	6	65	3	74
N Category (Equity)	1	0	0	1
Z Category (Equity)	29	58	31	118
Mutual Funds	32	1	0	33
Corporate Bonds	2	0	1	3
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,930,680	6,930,896	-0.0%
	Mn USD	56,313	56,315	-0.0%
Turnover	Mn BDT	5,444	5,198	+4.7%
	Mn USD	44	42	+4.7%
Volume	Mn Shares	218	184	+18.6%
No. of Trade		156,869	148,936	+5.3%

* Average Interbank Exchange Rate is BDT 123.07 as of Sep 10, 2026

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Figure: Sectorial Turnover (BDT Mn)

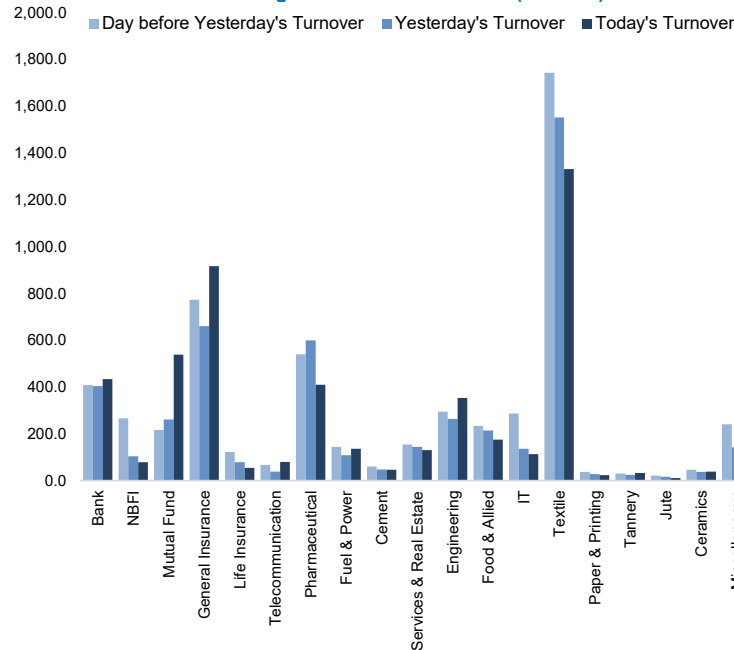
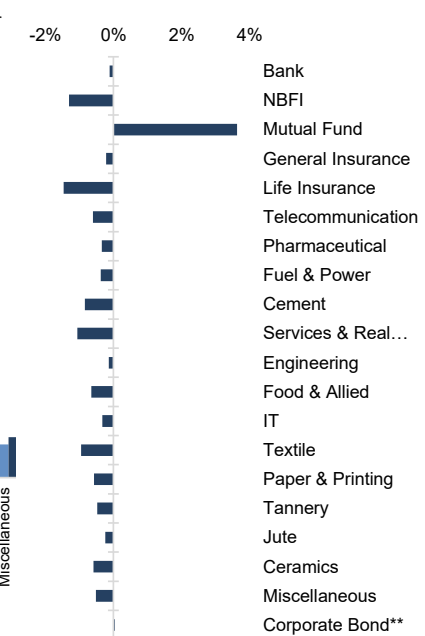


Figure: Sectorial Mcap Change



Market PE 13.0x

Market PB 1.6x

* 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	1,540	1,542	-1.65	-0.11%	36	733,991	10.6%	433.5	8.5%	7.2x	0.7x	GP	322,857	9.3%	40.4	9.2x	5.8x
NBFI	1,078	1,092	-14.25	-1.30%	23	102,519	1.5%	79.1	1.6%	NM	1.1x	SQURPHARMA	190,055	5.5%	31.7	7.4x	1.3x
Mutual Fund	661	638	+23.18	+3.63%	34	30,769	0.4%	538.6	10.6%	NM	0.6x	ROBI	157,138	4.5%	35.2	15.0x	2.4x
General Insurance	4,318	4,327	-9.27	-0.21%	43	121,992	1.8%	915.9	18.1%	18.0x	1.7x	BRACBANK	142,640	4.1%	22.5	6.3x	1.3x
Life Insurance	1,697	1,723	-25.20	-1.46%	15	47,846	0.7%	54.6	1.1%	NM	NM	WALTONHIL	129,956	3.7%	21.3	11.6x	1.0x
Telecommunication	4,374	4,400	-26.58	-0.60%	3	507,489	7.3%	79.5	1.6%	10.5x	3.6x	BATBC	123,120	3.5%	17.2	21.2x	2.1x
Pharmaceutical	3,073	3,084	-10.42	-0.34%	34	580,134	8.4%	409.2	8.1%	10.6x	1.5x	MARICO	84,159	2.4%	7.7	7.5x	18.3x
Fuel & Power	1,086	1,090	-4.03	-0.37%	23	286,770	4.1%	136.2	2.7%	9.2x	0.6x	BERGERPBL	72,451	2.1%	4.0	15.5x	3.4x
Cement	1,935	1,951	-16.35	-0.84%	7	91,027	1.3%	45.9	0.9%	21.1x	2.0x	BXPHARMA	67,318	1.9%	133.9	7.8x	1.1x
Services & Real Estate	1,149	1,161	-12.30	-1.06%	9	62,500	0.9%	130.0	2.6%	25.4x	0.5x	UPGDCL	64,752	1.9%	2.7	7.0x	1.4x
Engineering	2,599	2,602	-3.45	-0.13%	42	291,299	4.2%	353.1	7.0%	15.4x	0.8x	PUBALIBANK	58,877	1.7%	20.0	4.9x	0.8x
Food & Allied	12,293	12,373	-80.38	-0.65%	21	224,410	3.2%	174.8	3.4%	32.9x	3.3x	RENATA	52,646	1.5%	5.0	19.3x	1.4x
IT	2,421	2,428	-7.81	-0.32%	11	32,054	0.5%	113.0	2.2%	47.8x	2.0x	CITYBANK	52,132	1.5%	15.0	3.4x	0.8x
Textile	1,385	1,398	-13.26	-0.95%	58	144,049	2.1%	1,330.8	26.2%	NM	1.0x	ISLAMIBANK	44,597	1.3%	1.0	NM	0.8x
Paper & Printing	4,355	4,380	-24.90	-0.57%	6	20,400	0.3%	23.4	0.5%	NM	1.4x	DUTCHBANGL	44,053	1.3%	3.8	3.4x	0.7x
Tannery	2,095	2,105	-9.97	-0.47%	6	24,325	0.4%	32.4	0.6%	NM	1.5x	UNILEVERCL	38,445	1.1%	0.1	62.8x	23.6x
Jute	12,989	13,020	-31.20	-0.24%	3	2,833	0.0%	11.2	0.2%	NM	1.8x	EBL	38,134	1.1%	20.4	4.2x	0.8x
Ceramics	448	451	-2.62	-0.58%	5	20,242	0.3%	38.8	0.8%	NM	1.3x	POWERGRID	34,907	1.0%	0.6	8.6x	0.3x
Miscellaneous	2,464	2,477	-12.71	-0.51%	15	133,802	1.9%	172.6	3.4%	38.4x	1.0x	PRIMEBANK	34,609	1.0%	12.0	3.7x	0.7x
Corporate Bond**	18,141	18,133	+7.59	+0.04%	16	40,135	0.6%	0.1	0.0%	NM	NM	ICB	34,343	1.0%	1.3	NM	1.3x
Treasury Bond**	2,237	2,228	+8.98	+0.40%	232	3,436,407	49.6%	0.8	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
CAPMBDBLMF	7.9	+9.7%	15.9	NM	0.9x	SQURPHARMA	106,146	7.2%	7.4x	1.3x	ENVOYTEX	74.5	+0.5%	201.7	9.0x	1.2x
PF1STMF	17.8	+9.2%	66.0	NM	2.0x	BRACBANK	76,783	5.2%	6.3x	1.3x	SHARPIND	19.0	-3.1%	191.3	NM	2.4x
EXIM1STMF	7.4	+8.8%	163.1	NM	0.8x	BXPHARMA	47,035	3.2%	7.8x	1.1x	EXIM1STMF	7.4	+8.8%	163.1	NM	0.8x
SIPLC	138.7	+8.5%	68.9	27.2x	4.6x	ISLAMIBANK	44,516	3.0%	NM	0.8x	PTL	78.1	-	160.1	12.3x	1.6x
MERCINS	48.3	+7.3%	109.4	31.0x	2.2x	WALTONHIL	42,769	2.9%	11.6x	1.0x	SAIHAMTEX	32.3	+2.5%	137.1	52.1x	0.7x
NCCBLMF1	6.7	+6.35%	4.1	NM	0.7x	PUBALIBANK	40,113	2.7%	4.9x	0.8x	BXPHARMA	150.9	-0.1%	133.9	7.8x	1.1x
GLDNJMF	8.7	+6.1%	15.2	NM	1x	CITYBANK	36,300	2.5%	3.4x	0.8x	MALEKSPIN	46.4	-2.9%	120.1	8.2x	0.7x
EBLNRBMF	3.6	+5.9%	6.6	NM	0.4x	BATBC	32,565	2.2%	21.2x	2.1x	NITOLINS	56.8	+3.3%	112.0	28.0x	1.8x
1JANATAMF	3.6	+5.9%	6.1	NM	0.4x	GP	32,286	2.2%	9.2x	5.8x	MERCINS	48.3	+7.3%	109.4	31.0x	2.2x
ICBAMCL2ND	7.3	+5.8%	1.1	NM	0.8x	EBL	26,144	1.8%	4.2x	0.8x	SOUTHEASTB	12.6	+2.4%	106.4	4.2x	0.5x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,644	1.7%	19.3x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RELIANCINS	97.2	-6.2%	69.8	10.2x	1.1x	LHB	21,727	1.5%	12.1x	3.2x	IPDC	33.0	29.0	3.0	2,409	77.86
DSHGARME	150.8	-4.9%	10.5	NM	1x	PRIMEBANK	21,620	1.5%	3.7x	0.7x	PUBALIBANK	37.4	37.4	5.0	2,000	74.80
AFCAGRO	6.2	-4.5%	0.4	NM	NM	UCB	19,852	1.4%	3.8x	0.6x	BNICL	120.0	112.0	5.0	472	54.24
FIRSTFIN	4.2	-4.5%	0.4	NM	NM	OLYMPIC	17,841	1.2%	15.0x	2.1x	CITYGENINS	128.0	117.0	5.0	349	44.17
PROGRESLIF	36.3	-4.2%	0.4	NM	NM	UTTARABANK	17,525	1.2%	NM	0.8x	SOUTHEASTB	13.5	13.5	4.0	1,215	16.40
NAVANAPHAR	63.7	-4.2%	27.7	10.9x	1.3x	ROBI	15,714	1.1%	15.0x	2.4x	DGIC	33.0	32.5	12.0	468	15.38
AL-HAJTEX	70.0	-4.0%	18.8	NM	4.9x	BSRMLTD	15,331	1.0%	4.5x	0.5x	TRUSTBANK	14.8	14.8	2.0	1,000	14.80
METROSPIN	9.7	-4.0%	1.6	NM	2.4x	ALARABANK	15,056	1.0%	19.7x	0.7x	DAFODILCOM	165.7	165.5	7.0	60	9.86
SONARGAON	88.0	-3.9%	6.4	NM	4.8x	BEACONPHAR	14,212	1.0%	16.2x	3.0x	PTL	85.9	75.0	9.0	120	9.76
CLICL	42.1	-3.9%	5.6	NM	NM						ASIATICLAB	116.6	110.0	3.0	65	7.46

* 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

*. 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	Important DSE News
IPDC	33.0	29.0	77.9	2,409	3	
PUBALIBANK	37.4	37.4	74.8	2,000	5	
BNICL	120.0	112.0	54.2	472	5	
CITYGENINS	128.0	117.0	44.2	349	5	
SOUTHEASTB	13.5	13.5	16.4	1,215	4	
DGIC	33.0	32.5	15.4	468	12	
TRUSTBANK	14.8	14.8	14.8	1,000	2	
DAFODILCOM	165.7	165.5	9.9	60	7	
PTL	85.9	75.0	9.8	120	9	
ASIATICLAB	116.6	110.0	7.5	65	3	
NAVANAPHAR	73.0	73.0	4.7	65	1	
NCCBANK	16.0	16.0	4.0	250	1	
SHYAMPSUG	290.0	290.0	3.8	13	1	
UTTARABANK	22.8	22.2	3.2	142	5	
NAHEEACP	37.7	37.7	3.2	85	1	
MALEKSPIN	50.0	50.0	2.5	50	1	
KTL	12.2	12.2	2.3	190	2	
JANATAINS	34.4	34.4	2.1	60	1	
CONFIDCEM	66.7	66.7	2.0	30	1	
DELTALIFE	77.7	77.7	1.9	25	1	
UNITEDFIN	18.6	15.3	1.7	103	2	
SALVO	32.4	32.4	1.6	50	2	
Total			370.9		90	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
WALTONHIL		10.0%	180.0%	Record Date	20-Sep-26
AAMRANET		0.0%	0.1%	Record Date	24-Sep-26

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