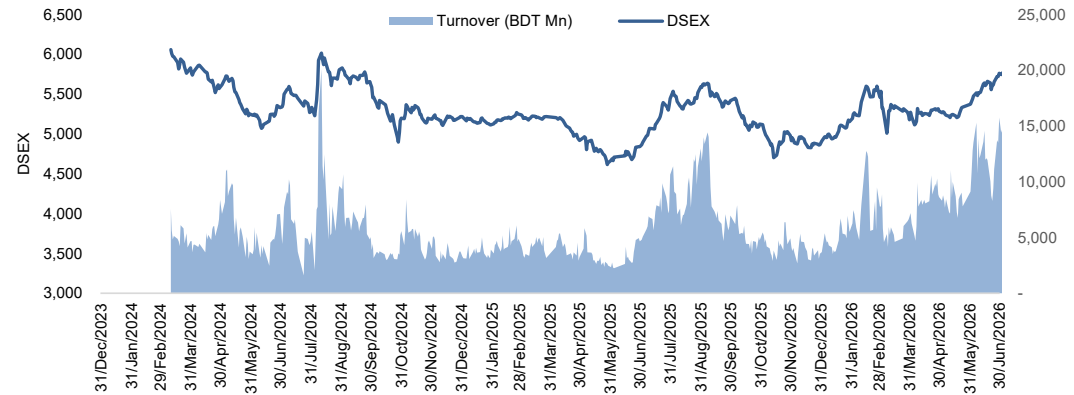


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.18%) lost 10.18 points and closed at 5,540.32. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (-0.16%) closed at 2,106.18, 1,108.57, and 1,108.49 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 0.86% followed by Fuel & Power (-0.59%), Bank (-0.45%), Telecommunication (-0.32%), Food & Allied (-0.14%), Pharmaceutical (+0.23%), and Engineering (+0.27%), respectively. Block trades contributed 6.1% of the overall market turnover. Dominage Steel Building Systems Limited (+10.0%) was the most traded share with a turnover of BDT 344 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,540.32	5,550.50	-10.18	-0.18%	+13.9%
DS30	2,106.18	2,105.92	+0.26	+0.01%	+13.6%
DSES	1,108.57	1,107.00	+1.57	+0.14%	+10.8%
CDSET	1,108.49	1,110.24	-1.75	-0.16%	+10.3%

	Advanced	Declined	Unchanged	Total
All Category	103	227	55	385
A Category (Equity)	62	117	14	193
B Category (Equity)	20	47	7	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	21	63	34	118
Mutual Funds	19	7	7	33
Corporate Bonds	2	0	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,914,447	6,929,002	-0.2%
	Mn USD	56,274	56,392	
Turnover	Mn BDT	7,915	7,887	+0.4%
	Mn USD	64	64	
Volume	Mn Shares	290	295	-1.7%
No. of Trade		201,745	220,637	-8.6%

* Average Interbank Exchange Rate is BDT 122.87 as of Sep 22, 2026

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Figure: Sectorial Turnover (BDT Mn)

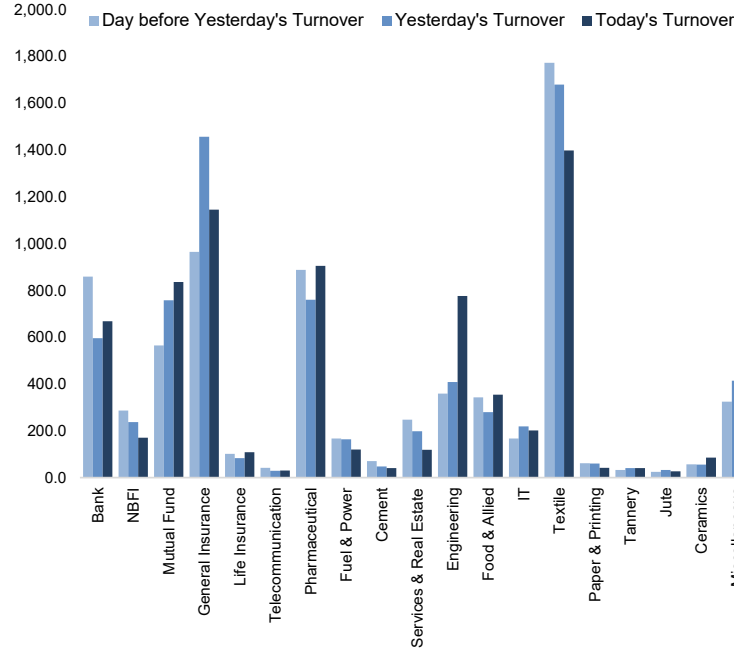
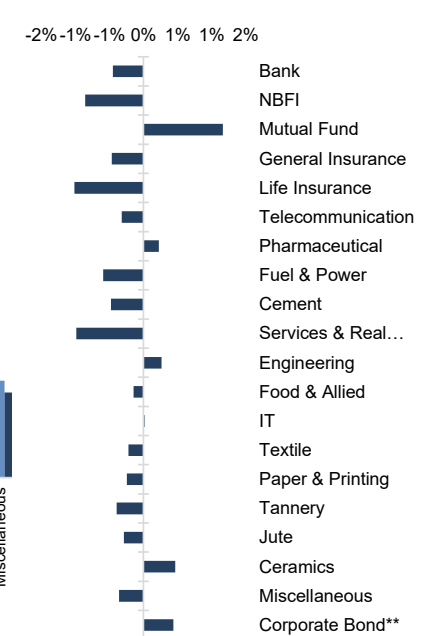


Figure: Sectorial Mcap Change



Market PE 13.1x

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	1,547	1,554	-6.98	-0.45%	36	737,249	10.7%	668.1	9.0%	7.2x	0.7x	GP	325,287	9.3%	12.3	9.2x	5.8x
NBFI	1,082	1,091	-9.34	-0.86%	23	102,907	1.5%	171.0	2.3%	NM	1.1x	SQURPHARMA	191,473	5.5%	221.0	7.4x	1.3x
Mutual Fund	698	690	+8.04	+1.17%	34	32,467	0.5%	835.4	11.2%	NM	0.6x	ROBI	157,138	4.5%	12.5	15.0x	2.4x
General Insurance	4,486	4,507	-20.99	-0.47%	43	126,747	1.8%	1,144.6	15.4%	18.7x	1.7x	BRACBANK	145,845	4.2%	39.7	6.4x	1.3x
Life Insurance	1,668	1,686	-17.09	-1.01%	15	47,030	0.7%	108.5	1.5%	NM	NM	WALTONHIL	127,667	3.7%	13.4	11.4x	1.0x
Telecommunication	4,395	4,409	-14.05	-0.32%	3	509,995	7.4%	29.9	0.4%	10.5x	3.6x	BATBC	122,850	3.5%	8.0	21.1x	2.1x
Pharmaceutical	3,080	3,073	+7.03	+0.23%	34	581,387	8.4%	904.9	12.2%	10.6x	1.5x	MARICO	83,642	2.4%	2.7	7.4x	18.2x
Fuel & Power	1,091	1,097	-6.49	-0.59%	23	287,941	4.2%	119.9	1.6%	9.3x	0.6x	BERGERPBL	71,778	2.1%	2.2	15.4x	3.3x
Cement	1,992	2,002	-9.53	-0.48%	7	93,735	1.4%	40.6	0.5%	21.7x	2.1x	BXPHARMA	66,381	1.9%	77.1	7.7x	1.1x
Services & Real Estate	1,136	1,147	-11.32	-0.99%	9	61,811	0.9%	119.1	1.6%	25.2x	0.5x	UPGDCL	66,259	1.9%	1.9	7.1x	1.4x
Engineering	2,584	2,577	+6.83	+0.27%	42	289,592	4.2%	775.8	10.4%	15.2x	0.8x	LHB	62,133	1.8%	21.7	12.6x	3.3x
Food & Allied	12,318	12,336	-17.87	-0.14%	21	224,873	3.3%	353.9	4.8%	32.9x	3.3x	CITYBANK	52,307	1.5%	32.2	3.4x	0.8x
IT	2,395	2,395	+0.37	+0.02%	11	31,715	0.5%	201.6	2.7%	51.6x	2.0x	RENATA	51,487	1.5%	24.7	18.9x	1.4x
Textile	1,375	1,378	-3.04	-0.22%	58	143,059	2.1%	1,397.7	18.8%	NM	1.0x	DUTCHBANGL	46,184	1.3%	4.0	3.5x	0.7x
Paper & Printing	4,388	4,399	-10.78	-0.24%	6	20,554	0.3%	41.8	0.6%	NM	1.4x	ISLAMIBANK	43,309	1.2%	0.7	NM	0.7x
Tannery	2,084	2,092	-8.26	-0.40%	6	24,197	0.3%	41.1	0.6%	NM	1.5x	UNILEVERCL	38,275	1.1%	0.2	62.5x	23.5x
Jute	13,085	13,123	-37.40	-0.29%	3	2,854	0.0%	27.0	0.4%	NM	1.8x	EBL	37,476	1.1%	341.4	4.2x	0.7x
Ceramics	447	445	+2.08	+0.47%	5	20,187	0.3%	85.8	1.2%	NM	1.3x	ICB	34,430	1.0%	0.4	NM	1.3x
Miscellaneous	2,480	2,489	-8.95	-0.36%	15	134,653	1.9%	363.8	4.9%	38.6x	1.0x	POWERGRID	34,268	1.0%	3.2	8.5x	0.2x
Corporate Bond**	18,296	18,216	+80.23	+0.44%	16	40,478	0.6%	0.1	0.0%	NM	NM	PRIMEBANK	34,243	1.0%	25.6	3.7x	0.7x
Treasury Bond**	2,217	2,221	-4.12	-0.19%	232	3,405,350	49.2%	0.0	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
DOMINAGE	66.1	+10.0%	344.3	NM	3.9x	SQURPHARMA	106,938	7.3%	7.4x	1.3x	DOMINAGE	66.1	+10.0%	344.3	NM	3.9x
ISNLTD	56.5	+9.9%	15.8	NM	26.4x	BRACBANK	78,509	5.3%	6.4x	1.3x	EBL	22.8	-0.9%	341.4	4.2x	0.7x
1STPRIMFMF	31.2	+9.9%	116.6	NM	3.2x	BXPHARMA	46,381	3.1%	7.7x	1.1x	SQURPHARMA	216.0	+0.1%	221.0	7.4x	1.3x
ICBAMCL2ND	9.6	+9.1%	37.8	NM	1.0x	ISLAMIBANK	43,231	2.9%	NM	0.7x	SAIHAMTEX	36.5	+3.4%	202.2	58.9x	0.8x
ORIONINFU	274.7	+8.7%	113.8	NM	16.9x	PUBALIBANK	42,347	2.9%	5.2x	0.8x	ANWARGALV	118.4	+2.8%	198.7	NM	22.0x
ZEALBANGLA	183.0	+7.65%	4.8	NM	NM	WALTONHIL	42,015	2.8%	11.4x	1.0x	SHARPIND	19.5	-0.5%	182.6	NM	2.5x
SPCERAMICS	22.7	+6.6%	49.0	NM	1x	CITYBANK	36,422	2.5%	3.4x	0.8x	LOVELLO	54.7	+3.2%	162.1	17.9x	4.1x
DSHGARME	157.5	+6.2%	19.4	NM	1.0x	GP	32,529	2.2%	9.2x	5.8x	PTL	78.3	+2.4%	156.1	12.4x	1.6x
PRIME1ICBA	6.9	+6.2%	21.2	NM	0.8x	BATBC	32,494	2.2%	21.1x	2.1x	ENVOYTEX	70.2	-2.9%	151.7	8.5x	1.1x
GREENDELMF	5.2	+6.1%	20.5	NM	0.6x	EBL	25,694	1.7%	4.2x	0.7x	ACMEPL	25.9	+4.4%	145.0	NM	1.7x
						RENATA	25,079	1.7%	18.9x	1.4x						
						LHB	22,747	1.5%	12.6x	3.3x						
						PRIMEBANK	21,392	1.5%	3.7x	0.7x						
						UCB	18,611	1.3%	3.8x	0.5x						
						OLYMPIC	17,954	1.2%	15.1x	2.1x						
						UTTARABANK	17,357	1.2%	NM	0.7x						
						ROBI	15,714	1.1%	15.0x	2.4x						
						BSRMLTD	15,205	1.0%	4.4x	0.5x						
						ALARABANK	14,861	1.0%	19.5x	0.7x						
						BEACONPHAR	14,073	1.0%	16.1x	3.0x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FIRSTFIN	4.3	-6.5%	0.3	NM	NM						BRACBANK	63.5	62.3	6.0	2,775	175.49
ZAHEENSPIN	5.0	-5.7%	0.7	7.4x	2x						SQURPHARMA	219.8	215.5	7.0	688	148.62
NEWLINE	5.4	-4.9%	1.3	NM	NM						RENATA	448.3	448.3	2.0	100	44.83
TUNGHAI	3.9	-4.9%	1.3	NM	NM						SAIHAMTEX	35.8	35.2	3.0	1,148	40.50
PREMIERLEA	2.0	-4.8%	0.4	NM	NM						TRUSTBANK	15.0	13.9	4.0	946	13.97
MERCANBANK	6.3	-4.5%	9.5	NM	0.3x						GQBALLPEN	644.8	556.0	6.0	23	13.27
FAMILYTEX	2.3	-4.2%	1.6	NM	0.2x						APEXSPINN	315.0	315.0	3.0	16	5.14
EXIM1STMF	7.0	-4.1%	71.1	NM	0.7x						IPDC	36.2	36.2	1.0	130	4.71
METROSPIN	9.4	-4.1%	1.1	NM	2.4x						ICICL	35.0	35.0	2.0	114	4.00
AOL	15.2	-3.8%	3.6	NM	0.8x						ANWARGALV	110.0	110.0	1.0	34	3.74

* 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
BRACBANK	63.5	62.3	175.5	2,775	6	
SQURPHARMA	219.8	215.5	148.6	688	7	
RENATA	448.3	448.3	44.8	100	2	
SAIHAMTEX	35.8	35.2	40.5	1,148	3	
TRUSTBANK	15.0	13.9	14.0	946	4	
GQBALLPEN	644.8	556.0	13.3	23	6	
APEXSPINN	315.0	315.0	5.1	16	3	
IPDC	36.2	36.2	4.7	130	1	
ICICL	35.0	35.0	4.0	114	2	
ANWARGALV	110.0	110.0	3.7	34	1	
1STPRIMFMF	29.2	29.2	3.4	118	2	
DOMINAGE	54.2	54.2	3.3	61	2	
UNITEDINS	56.3	56.3	3.1	55	1	
UTTARABANK	22.7	22.7	2.2	98	4	
CENTRALINS	43.0	43.0	2.1	49	1	
MEGHNAINS	37.9	37.9	1.9	51	1	
UNITEDFIN	18.1	18.1	1.9	103	3	
PTL	84.1	84.1	1.7	20	3	
DAFODILCOM	160.0	160.0	1.6	10	2	
OAL	6.5	6.5	1.3	200	1	
AGNISYSL	31.9	31.9	1.1	35	1	
ACMEPL	25.3	25.3	1.0	40	1	
Total			484.2		64	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
AAMRANET		0.0%	0.1%	Record Date	24-Sep-26
GPHISPAT		0.0%	2.0%	Record Date	1-Oct-26
AAMRATECH		0.0%	0.3%	Record Date	6-Oct-26

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