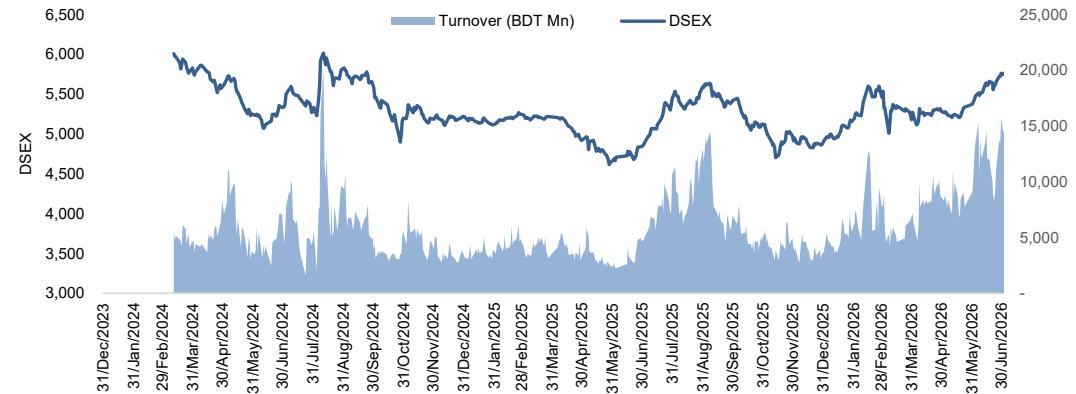


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.01%) gained 55.9 points and closed at 5,596.22. The blue-chip index DS30 (+0.79%), the Shariah-based index DSES (+0.97%), and the large-cap index CDSET (+0.59%) closed at 2,122.73, 1,119.32, and 1,115.02 points, respectively. All the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 1.05% followed by NBFi (+1.01%), Food & Allied (+0.87%), Engineering (+0.83%), Telecommunication (+0.70%), Pharmaceutical (+0.69%), and Bank (+0.53%), respectively. Block trades contributed 6.0% of the overall market turnover. Square Pharmaceuticals PLC. (+0.5%) was the most traded share with a turnover of BDT 355 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,596.22	5,540.32	+55.90	+1.01%	+15.0%
DS30	2,122.73	2,106.18	+16.55	+0.79%	+14.5%
DSES	1,119.32	1,108.57	+10.75	+0.97%	+11.9%
CDSET	1,115.02	1,108.49	+6.53	+0.59%	+11.0%

	Advanced	Declined	Unchanged	Total
All Category	246	102	37	385
A Category (Equity)	106	76	11	193
B Category (Equity)	65	7	2	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	75	19	24	118
Mutual Funds	3	27	3	33
Corporate Bonds	0	2	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,944,297	6,914,447	+0.4%
	Mn USD	56,504	56,262	
Turnover	Mn BDT	8,447	7,915	+6.7%
	Mn USD	69	64	
Volume	Mn Shares	268	290	-7.5%
No. of Trade		217,984	201,745	+8.0%

* Average Interbank Exchange Rate is BDT 122.90 as of Sep 23, 2026

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Figure: Sectorial Turnover (BDT Mn)

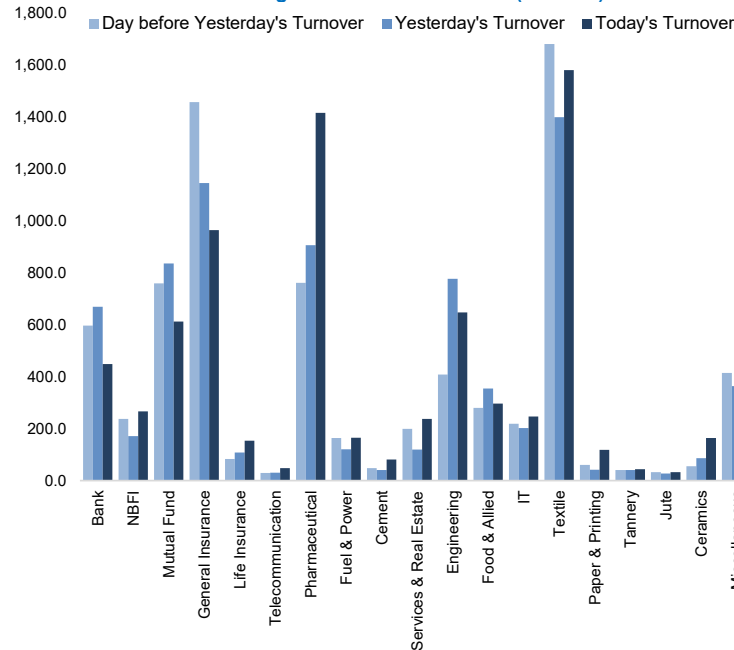
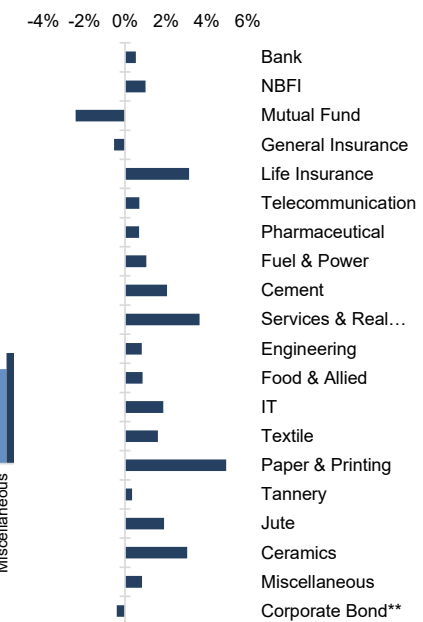


Figure: Sectorial Mcap Change



Market PE 13.2x

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	1,555	1,547	+8.12	+0.53%	36	741,120	10.7%	447.8	5.6%	7.3x	0.7x	GP	328,663	9.3%	18.8	9.3x	5.9x
NBFI	1,093	1,082	+10.90	+1.01%	23	103,943	1.5%	265.7	3.3%	NM	1.1x	SQURPHARMA	192,449	5.5%	354.7	7.4x	1.3x
Mutual Fund	681	698	-16.89	-2.42%	34	31,681	0.5%	611.1	7.7%	NM	0.6x	ROBI	157,138	4.5%	26.7	15.0x	2.4x
General Insurance	4,462	4,486	-23.83	-0.53%	43	126,074	1.8%	963.2	12.1%	18.6x	1.7x	BRACBANK	147,677	4.2%	101.4	6.5x	1.3x
Life Insurance	1,721	1,668	+52.41	+3.14%	15	48,507	0.7%	153.5	1.9%	NM	NM	WALTONHIL	126,787	3.6%	15.4	11.3x	1.0x
Telecommunication	4,426	4,395	+30.70	+0.70%	3	513,558	7.4%	47.6	0.6%	10.6x	3.7x	BATBC	124,146	3.5%	20.5	21.3x	2.1x
Pharmaceutical	3,101	3,080	+21.22	+0.69%	34	585,393	8.4%	1,413.5	17.8%	10.7x	1.5x	MARICO	83,799	2.4%	3.5	7.5x	18.2x
Fuel & Power	1,102	1,091	+11.45	+1.05%	23	290,964	4.2%	164.8	2.1%	9.4x	0.6x	BERGERPBL	71,901	2.0%	1.5	15.4x	3.4x
Cement	2,033	1,992	+41.04	+2.06%	7	95,666	1.4%	81.2	1.0%	22.2x	2.2x	UPGDCL	66,665	1.9%	2.8	7.2x	1.4x
Services & Real Estate	1,177	1,136	+41.51	+3.65%	9	64,070	0.9%	237.2	3.0%	26.1x	0.5x	BXPHARMA	66,649	1.9%	259.9	7.7x	1.1x
Engineering	2,605	2,584	+21.33	+0.83%	42	291,983	4.2%	646.5	8.1%	15.4x	0.8x	PUBALIBANK	62,313	1.8%	8.8	5.2x	0.8x
Food & Allied	12,425	12,318	+106.74	+0.87%	21	226,822	3.3%	295.9	3.7%	33.2x	3.4x	CITYBANK	52,132	1.5%	50.0	3.4x	0.8x
IT	2,440	2,395	+44.82	+1.87%	11	32,309	0.5%	246.8	3.1%	52.6x	2.0x	RENATA	51,487	1.5%	7.0	18.9x	1.4x
Textile	1,398	1,375	+22.15	+1.61%	58	145,363	2.1%	1,578.6	19.9%	NM	1.0x	DUTCHBANGL	46,286	1.3%	3.6	3.6x	0.7x
Paper & Printing	4,606	4,388	+217.49	+4.96%	6	21,572	0.3%	118.7	1.5%	NM	1.4x	ISLAMIBANK	43,470	1.2%	0.8	NM	0.7x
Tannery	2,091	2,084	+7.24	+0.35%	6	24,282	0.3%	44.1	0.6%	NM	1.5x	UNILEVERCL	38,298	1.1%	0.1	62.6x	23.5x
Jute	13,337	13,085	+251.15	+1.92%	3	2,909	0.0%	32.3	0.4%	NM	1.8x	EBL	38,134	1.1%	56.6	4.2x	0.8x
Ceramics	460	447	+13.63	+3.05%	5	20,803	0.3%	163.4	2.1%	NM	1.4x	POWERGRID	34,816	1.0%	3.1	8.6x	0.3x
Miscellaneous	2,500	2,480	+20.56	+0.83%	15	135,769	2.0%	425.3	5.4%	38.9x	1.0x	ICB	34,777	1.0%	1.2	NM	1.3x
Corporate Bond**	18,221	18,296	-74.80	-0.41%	16	40,312	0.6%	0.1	0.0%	NM	NM	PRIMEBANK	34,609	1.0%	15.3	3.7x	0.7x
Treasury Bond**	2,217	2,217	-0.01	-0.00%	232	3,405,338	49.0%	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
ORIONPHARM	27.5	+10.0%	9.9	NM	0.3x	SQURPHARMA	107,482	7.2%	7.4x	1.3x	SQURPHARMA	217.1	+0.5%	354.7	7.4x	1.3x
UNIQUEHRL	44.2	+10.0%	66.2	8.8x	0.5x	BRACBANK	79,495	5.3%	6.5x	1.3x	BXPHARMA	149.4	+0.4%	259.9	7.7x	1.1x
INDEXAGRO	76.3	+9.9%	54.9	15.5x	0.9x	BXPHARMA	46,568	3.1%	7.7x	1.1x	DOMINAGE	67.7	+2.4%	252.3	NM	4.0x
CLICL	46.5	+9.9%	19.4	NM	NM	ISLAMIBANK	43,392	2.9%	NM	0.7x	ORIONINFU	273.0	-0.6%	244.1	NM	16.8x
SEAPEARL	37.7	+9.9%	73.8	NM	2.8x	PUBALIBANK	42,454	2.9%	5.2x	0.8x	IPDC	33.6	+0.9%	200.7	28.2x	2.0x
BPML	28.0	+9.80%	3.7	NM	0.8x	WALTONHIL	41,726	2.8%	11.3x	1.0x	MALEKSPIN	47.3	+0.6%	181.2	8.3x	0.7x
MATINSPINN	65.4	+9.5%	52.4	14.9x	1x	CITYBANK	36,300	2.4%	3.4x	0.8x	APEXSPINN	354.2	+8.7%	172.3	NM	4.2x
TOSRIFA	20.7	+9.5%	18.6	38.3x	0.7x	GP	32,866	2.2%	9.3x	5.9x	ENVOYTEX	71.4	+1.7%	159.7	8.6x	1.2x
APEXSPINN	354.2	+8.7%	172.3	NM	4.2x	BATBC	32,837	2.2%	21.3x	2.1x	SHARPIND	19.7	+1.0%	158.1	NM	2.5x
MONNOFABR	20.5	+7.9%	36.3	NM	0.8x	EBL	26,144	1.8%	4.2x	0.8x	SAIHAMTEX	37.4	+2.5%	156.3	60.3x	0.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,079	1.7%	18.9x	1.4x						
ABB1STMF	3.6	-5.3%	16.7	NM	0.4x	LHB	23,172	1.6%	12.9x	3.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RELIANCE1	12.7	-5.2%	53.3	NM	1x	PRIMEBANK	21,620	1.5%	3.7x	0.7x	PRIMEBANK	28.2	28.2	2.0	4,900	138.19
GLDNJMF	9.1	-4.7%	2.5	NM	0.7x	UCB	18,611	1.3%	3.8x	0.5x	ALARABANK	15.7	15.7	2.0	4,169	65.45
ICB3RDNRB	6.1	-4.7%	2.5	NM	0.7x	OLYMPIC	17,979	1.2%	15.1x	2.2x	GQBALLPEN	575.1	551.0	17.0	103	57.74
IFIC1STMF	4.1	-4.7%	4.8	NM	0.5x	UTTARABANK	17,357	1.2%	NM	0.7x	MALEKSPIN	51.7	51.7	1.0	1,058	54.70
PRIME1ICBA	6.6	-4.3%	5.6	NM	0.8x	ROBI	15,714	1.1%	15.0x	2.4x	JAMUNABANK	23.2	23.2	1.0	2,150	49.88
NCCBLMF1	6.7	-4.3%	3.3	NM	0.7x	BSRMLTD	15,284	1.0%	4.4x	0.5x	SAIHAMTEX	36.5	36.0	6.0	1,082	39.47
EXIM1STMF	6.7	-4.3%	55.7	NM	0.7x	ALARABANK	14,861	1.0%	19.5x	0.7x	DAFODILCOM	161.1	160.0	14.0	164	26.24
LRGLOBMF1	4.5	-4.3%	4.5	NM	0.5x	BEACONPHAR	14,420	1.0%	16.5x	3.1x	BNICL	148.0	145.0	5.0	119	17.49
GREENDELMF	5.0	-3.8%	6.0	NM	0.6x						TRUSTBANK	14.5	13.9	6.0	735	10.32
											NITOLINS	58.0	57.8	2.0	150	8.69

* 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
PRIMEBANK	28.2	28.2	138.2	4,900	2
ALARABANK	15.7	15.7	65.5	4,169	2
GQBALLPEN	575.1	551.0	57.7	103	17
MALEKSPIN	51.7	51.7	54.7	1,058	1
JAMUNABANK	23.2	23.2	49.9	2,150	1
SAIHAMTEX	36.5	36.0	39.5	1,082	6
DAFODILCOM	161.1	160.0	26.2	164	14
BNICL	148.0	145.0	17.5	119	5
TRUSTBANK	14.5	13.9	10.3	735	6
NITOLINS	58.0	57.8	8.7	150	2
IPDC	36.3	36.0	6.7	185	2
PTL	79.5	73.8	4.7	60	2
ASIATICLAB	115.9	114.0	4.0	35	2
SONALILIFE	85.0	85.0	4.0	47	1
ICICL	35.0	35.0	3.5	100	1
CITYGENINS	118.1	118.1	2.9	25	1
DGIC	38.5	34.5	2.7	74	3
APEXSPINN	320.0	320.0	2.7	8	2
CAPMIBBLMF	14.5	13.1	1.5	110	2
PRAGATILIF	126.7	126.7	1.5	12	1
DOMINAGE	67.3	64.8	1.4	21	2
EBL	21.5	21.5	1.3	62	1
Total			509.6		82

Important DSE News
EBL

Mr. Anis Ahmed, a Director of the Company will receive 16,436,878 shares of the Company from his Father, Mr. M. Ghaziul Haque, a General Shareholder of the Company, by way of gift outside the trading system of the Exchange within October 29, 2026.

PRIMEBANK

Mr. Nafis Sikder, a Director of the Company has expressed his intention to buy 1,885,515 shares of the company at the prevailing market price in the Block Market through Dhaka Stock Exchange PLC. within October 29, 2026.

MJL Bangladesh PLC., a Corporate Director of the Company has expressed its intention to buy 3,014,895 shares of the company at the prevailing market price in the Block Market through Dhaka Stock Exchange PLC. within October 29, 2026.

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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