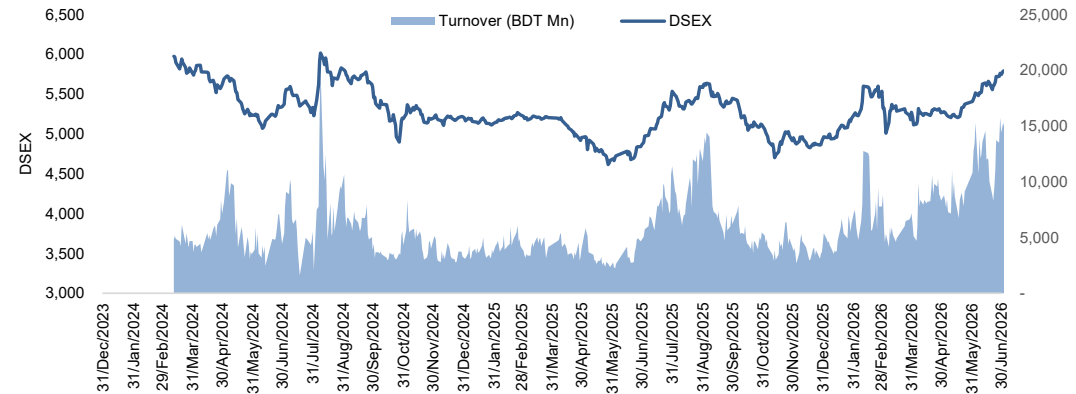


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.32%) lost 17.89 points and closed at 5,578.33. The blue-chip index DS30 (-0.50%), the Shariah-based index DSES (-0.31%), and the large-cap index CDSET (-0.42%) closed at 2,112.13, 1,115.89, and 1,110.35 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.01%, followed by Telecommunication (+0.01%), NBFi (+0.00%), Fuel & Power (-0.21%), Bank (-0.42%), Food & Allied (-0.87%), and Engineering (-0.89%), respectively. Block trades contributed 7.0% of the overall market turnover. IPDC Finance PLC. (+3.6%) was the most traded share with a turnover of BDT 236 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,578.33	5,596.22	-17.89	-0.32%	+14.7%
DS30	2,112.13	2,122.73	-10.60	-0.50%	+14.0%
DSES	1,115.89	1,119.32	-3.44	-0.31%	+11.5%
CDSET	1,110.35	1,115.02	-4.67	-0.42%	+10.5%

	Advanced	Declined	Unchanged	Total
All Category	141	190	57	388
A Category (Equity)	90	84	23	197
B Category (Equity)	10	60	4	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	41	46	30	117
Mutual Funds	23	1	9	33
Corporate Bonds	2	2	0	4
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,905,719	6,944,297	-0.6%
	Mn USD	56,051	56,364	
Turnover	Mn BDT	7,563	8,447	-10.5%
	Mn USD	61	69	
Volume	Mn Shares	238	268	-11.1%
No. of Trade		202,860	217,984	-6.9%

* Average Interbank Exchange Rate is BDT 123.20 as of Sep 24, 2026

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Figure: Sectorial Turnover (BDT Mn)

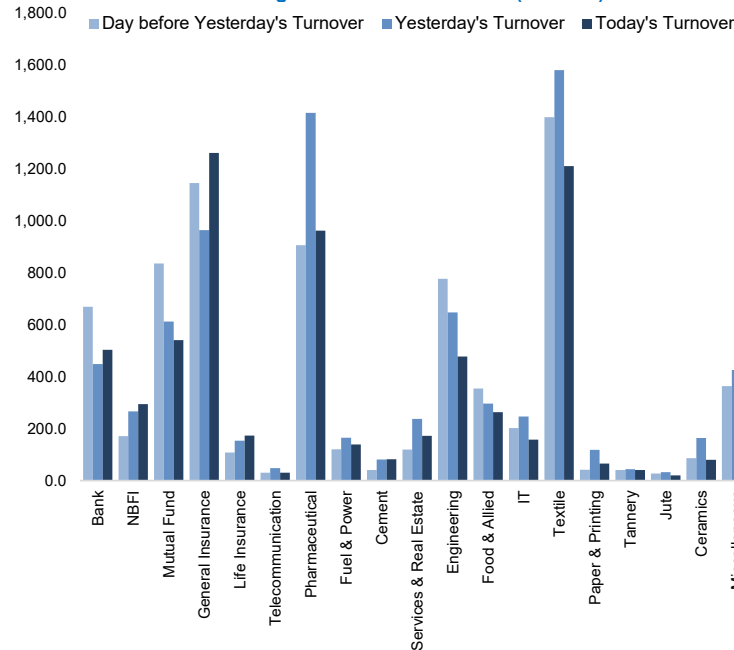
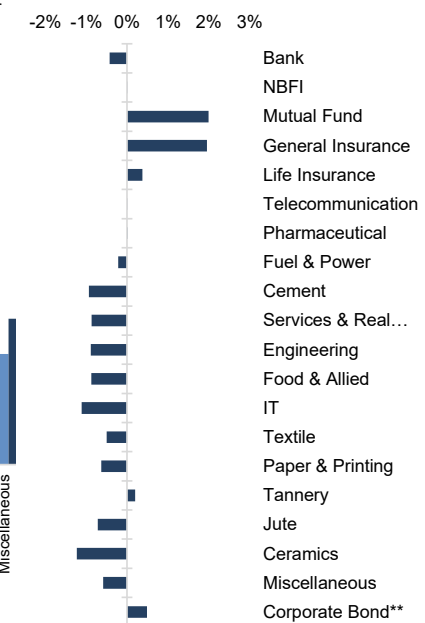


Figure: Sectorial Mcap Change



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	1,548	1,555	-6.58	-0.42%	36	737,983	10.7%	502.6	7.1%	7.3x	0.7x	GP	328,798	9.3%	13.9	9.3x	5.9x
NBFI	1,093	1,093	+0.03	+0.00%	23	103,946	1.5%	294.2	4.2%	NM	1.1x	SQURPHARMA	192,892	5.5%	189.1	7.5x	1.3x
Mutual Fund	694	681	+13.60	+2.00%	34	32,314	0.5%	540.6	7.7%	NM	0.6x	ROBI	157,138	4.5%	14.8	15.0x	2.4x
General Insurance	4,550	4,462	+87.43	+1.96%	43	128,544	1.9%	1,259.9	17.9%	18.9x	1.8x	BRACBANK	146,990	4.2%	156.8	6.5x	1.3x
Life Insurance	1,727	1,721	+6.44	+0.37%	15	48,689	0.7%	172.8	2.5%	NM	NM	WALTONHIL	125,908	3.6%	11.9	11.2x	1.0x
Telecommunication	4,426	4,426	+0.36	+0.01%	3	513,599	7.4%	30.3	0.4%	10.6x	3.7x	BATBC	122,310	3.5%	21.0	21.0x	2.1x
Pharmaceutical	3,102	3,101	+0.46	+0.01%	34	585,479	8.5%	961.3	13.7%	10.7x	1.5x	MARICO	83,815	2.4%	4.5	7.5x	18.2x
Fuel & Power	1,100	1,102	-2.35	-0.21%	23	290,343	4.2%	139.3	2.0%	9.3x	0.6x	BERGERPBL	71,916	2.0%	3.6	15.4x	3.4x
Cement	2,014	2,033	-18.95	-0.93%	7	94,774	1.4%	81.7	1.2%	22.0x	2.1x	UPGDCL	66,491	1.9%	2.7	7.2x	1.4x
Services & Real Estate	1,167	1,177	-10.23	-0.87%	9	63,513	0.9%	171.6	2.4%	25.9x	0.5x	BXPBARMA	66,203	1.9%	52.0	7.7x	1.1x
Engineering	2,582	2,605	-23.08	-0.89%	42	289,396	4.2%	477.5	6.8%	15.2x	0.8x	PUBALIBANK	61,219	1.7%	27.3	5.1x	0.8x
Food & Allied	12,317	12,425	-108.16	-0.87%	21	224,847	3.3%	263.2	3.7%	32.9x	3.3x	CITYBANK	52,132	1.5%	40.3	3.4x	0.8x
IT	2,413	2,440	-27.06	-1.11%	11	31,950	0.5%	158.0	2.2%	52.0x	2.0x	RENATA	51,510	1.5%	53.0	18.9x	1.4x
Textile	1,391	1,398	-7.00	-0.50%	58	144,635	2.1%	1,208.8	17.2%	NM	1.0x	DUTCHBANGL	46,692	1.3%	7.2	3.6x	0.8x
Paper & Printing	4,577	4,606	-29.05	-0.63%	6	21,436	0.3%	65.3	0.9%	NM	1.4x	ISLAMIBANK	43,309	1.2%	0.7	NM	0.7x
Tannery	2,095	2,091	+4.18	+0.20%	6	24,330	0.4%	40.8	0.6%	NM	1.5x	UNILEVERCL	38,342	1.1%	0.3	62.6x	23.5x
Jute	13,241	13,337	-95.17	-0.71%	3	2,888	0.0%	20.0	0.3%	NM	1.8x	EBL	37,640	1.1%	49.8	4.2x	0.7x
Ceramics	455	460	-5.65	-1.23%	5	20,548	0.3%	80.4	1.1%	NM	1.4x	POWERGRID	34,725	1.0%	3.4	8.6x	0.3x
Miscellaneous	2,486	2,500	-14.52	-0.58%	15	134,981	2.0%	561.1	8.0%	38.7x	1.0x	ICB	34,430	1.0%	1.7	NM	1.3x
Corporate Bond**	18,310	18,221	+88.63	+0.49%	16	40,508	0.6%	0.5	0.0%	NM	NM	PRIMEBANK	34,365	1.0%	12.6	3.7x	0.7x
Treasury Bond**	2,197	2,217	-19.70	-0.89%	232	3,375,076	48.8%	1.7	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	
CNATEX	3.3	+10.0%	14.9	41.3x	NM	SQURPHARMA	107,730	7.3%	7.5x	1.3x	IPDC	34.8	+3.6%	236.1	29.2x	2.0x	
SIPLC	148.9	+10.0%	123.8	29.3x	4.9x	BRACBANK	79,125	5.3%	6.5x	1.3x	GQBALLPEN	625.0	+2.1%	212.1	NM	4.5x	
ORIONPHARM	30.2	+9.8%	58.7	NM	0.4x	BXPHARMA	46,256	3.1%	7.7x	1.1x	SQURPHARMA	217.6	+0.2%	189.1	7.5x	1.3x	
EMERALDOIL	29.4	+7.7%	16.5	NM	NM	ISLAMIBANK	43,231	2.9%	NM	0.7x	ENVOYTEX	73.8	+3.4%	178.3	8.9x	1.2x	
TUNGHAI	4.2	+7.7%	1.0	NM	NM	PUBALIBANK	41,709	2.8%	5.1x	0.8x	SHARPIND	19.1	-3.0%	177.3	NM	2.4x	
PRIME1ICBA	7.1	+7.58%	11.5	NM	0.8x	WALTONHIL	41,436	2.8%	11.2x	1.0x	MERCINS	51.3	+6.0%	173.9	32.9x	2.3x	
BNICL	167.5	+7.2%	80.4	29.0x	5x	CITYBANK	36,300	2.4%	3.4x	0.8x	BRACBANK	64.2	-0.5%	156.8	6.5x	1.3x	
FAREASTLIF	18.8	+6.2%	2.9	NM	NM	GP	32,880	2.2%	9.3x	5.9x	SAIHAMTEX	34.9	-6.7%	156.6	56.3x	0.8x	
ICBAMCL2ND	10.4	+6.1%	22.2	NM	1.1x	BATBC	32,351	2.2%	21.0x	2.1x	SIPLC	148.9	+10.0%	123.8	29.3x	4.9x	
MERCINS	51.3	+6.0%	173.9	32.9x	2.3x	EBL	25,806	1.7%	4.2x	0.7x	DOMINAGE	65.7	-3.0%	121.8	NM	3.9x	
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,091	1.7%	18.9x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)	
SAIHAMTEX	34.9	-6.7%	156.6	56.3x	0.8x	LHB	22,960	1.5%	12.7x	3.4x	FINEFOODS	450.0	440.0	3.0	390	174.60	
PLFSL	1.7	-5.6%	1.1	NM	NM	PRIMEBANK	21,468	1.4%	3.7x	0.7x	GQBALLPEN	626.0	570.0	23.0	209	124.11	
KBPPWBIL	37.9	-4.3%	22.0	16.3x	0.6x	UCB	18,197	1.2%	3.8x	0.5x	MARICO	2,650.0	2,650.0	15.0	16	42.93	
PREMIERCEM	42.5	-4.3%	22.0	16.3x	0.6x	OLYMPIC	17,966	1.2%	15.1x	2.1x	CITYGENINS	128.7	120.0	2.0	299	38.42	
MEGHNAPET	77.9	-4.2%	25.2	NM	1.1x	UTTARABANK	17,357	1.2%	NM	0.7x	BRACBANK	64.5	64.4	2.0	463	29.84	
ISNLTD	55.1	-4.0%	16.7	NM	25.7x	ROBI	15,714	1.1%	15.0x	2.4x	SOUTHEASTB	10.6	10.6	1.0	1,400	14.84	
USMANIAGL	54.4	-3.9%	1.1	NM	0.9x	ALARABANK	15,349	1.0%	20.1x	0.7x	PTL	85.1	70.5	5.0	176	12.67	
ZAHINTEX	7.7	-3.7%	0.1	NM	1.0x	BSRMLTD	15,205	1.0%	4.4x	0.5x	PRIMEINSUR	56.2	46.8	3.0	232	11.00	
ORIONINFU	262.9	-3.7%	119.8	NM	16.2x	BEACONPHAR	14,309	1.0%	16.3x	3.1x	BNICL	160.0	157.0	5.0	57	9.05	
MIRAKHTER	35.1	-3.6%	13.6	26.0x	0.7x	* 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						ASIANS	39.2	39.2	1.0	190	7.45

* 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
FINEFOODS	450.0	440.0	174.6	390	3	
GQBALLPEN	626.0	570.0	124.1	209	23	
MARICO	2,650.0	2,650.0	42.9	16	15	
CITYGENINS	128.7	120.0	38.4	299	2	
BRACBANK	64.5	64.4	29.8	463	2	
SOUTHEASTB	10.6	10.6	14.8	1,400	1	
PTL	85.1	70.5	12.7	176	5	
PRIMEINSUR	56.2	46.8	11.0	232	3	
BNICL	160.0	157.0	9.1	57	5	
ASIAINS	39.2	39.2	7.4	190	1	
SONARBAINS	40.2	40.2	7.4	185	1	
IPDC	33.1	30.5	6.9	220	3	
BDAUTOCA	191.0	189.0	4.6	24	3	
SONALILIFE	84.6	84.6	4.5	53	1	
SAIHAMTEX	36.5	36.5	4.4	120	1	
DAFODILCOM	160.1	160.0	4.0	25	4	
SPCL	51.7	51.7	3.5	67	1	
SANDHANINS	26.5	26.5	3.2	121	1	
ISLAMIINS	64.6	61.5	3.1	51	2	
SAPORTL	60.5	60.5	3.0	50	1	
JAMUNABANK	23.1	23.1	2.1	90	2	
STANDARINS	57.0	57.0	1.8	32	1	
Total			531.6		105	

Upcoming Corporate Events

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

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