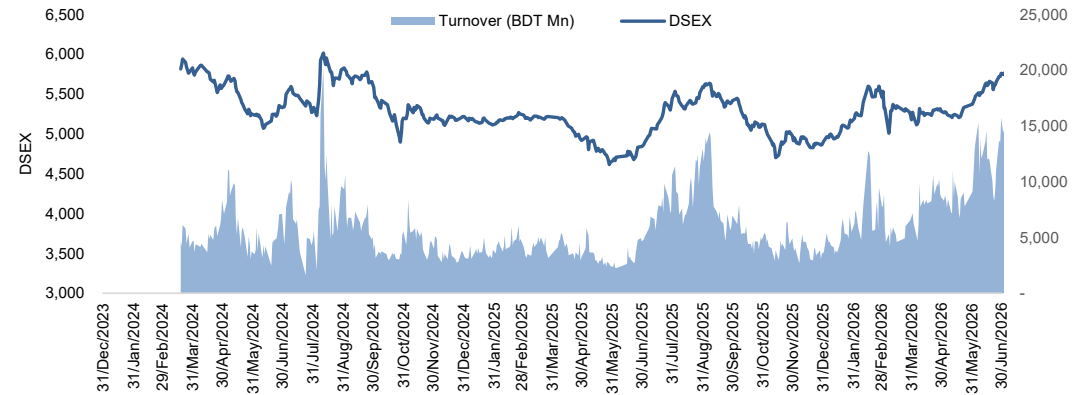


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.03%) lost 1.5 points and closed at 5,524.37. The blue-chip index DS30 (-0.16%), the Shariah-based index DSES (-0.19%), and the large-cap index CDSET (-0.18%) closed at 2,094.68, 1,098.04, and 1,099.20 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 0.47% followed by Telecommunication (-0.38%), Pharmaceutical (-0.29%), Engineering (-0.13%), Bank (-0.08%), Food & Allied (+0.01%), and Fuel & Power (+0.12%), respectively. Block trades contributed 9.2% of the overall market turnover. Saiham Textile Mills Ltd. (+5.7%) was the most traded share with a turnover of BDT 337 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,524.37	5,525.86	-1.50	-0.03%	+13.5%
DS30	2,094.68	2,097.94	-3.26	-0.16%	+13.0%
DSES	1,098.04	1,100.18	-2.14	-0.19%	+9.7%
CDSET	1,099.20	1,101.20	-2.00	-0.18%	+9.4%

	Advanced	Declined	Unchanged	Total
All Category	142	178	75	395
A Category (Equity)	52	116	35	203
B Category (Equity)	40	23	11	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	50	39	29	118
Mutual Funds	3	17	13	33
Corporate Bonds	0	1	1	2
Treasury Bonds	2	9	0	11

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,851,893	6,875,358	-0.3%
	Mn USD	55,731	55,922	
Turnover	Mn BDT	6,345	7,465	-15.0%
	Mn USD	52	61	
Volume	Mn Shares	208	235	-11.2%
No. of Trade		172,615	195,699	-11.8%

* Average Interbank Exchange Rate is BDT 122.95 as of Sep 29, 2026

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Figure: Sectorial Turnover (BDT Mn)

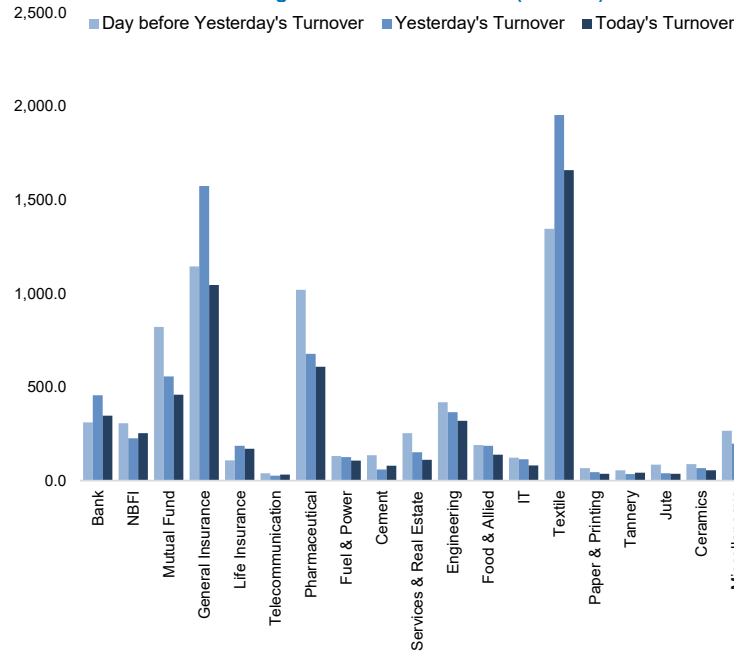
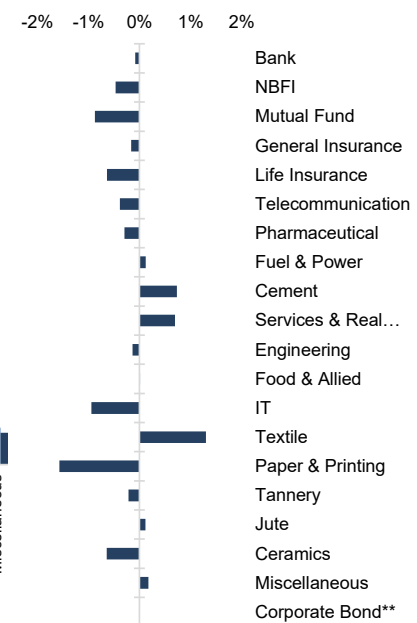


Figure: Sectorial Mcap Change



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	1,537	1,539	-1.29	-0.08%	36	732,748	10.7%	346.9	6.0%	7.2x	0.7x	GP	326,503	9.4%	7.4	9.3x	5.8x
NBFI	1,074	1,079	-5.04	-0.47%	23	102,089	1.5%	253.6	4.4%	NM	1.1x	SQURPHARMA	192,714	5.5%	38.4	7.5x	1.3x
Mutual Fund	689	695	-6.05	-0.87%	34	32,079	0.5%	458.4	8.0%	NM	0.6x	ROBI	156,614	4.5%	17.8	15.0x	2.4x
General Insurance	4,619	4,627	-7.54	-0.16%	43	130,513	1.9%	1,045.4	18.1%	19.2x	1.8x	BRACBANK	147,906	4.2%	133.8	6.5x	1.3x
Life Insurance	1,708	1,719	-10.93	-0.64%	15	48,157	0.7%	170.2	3.0%	NM	NM	WALTONHIL	123,708	3.5%	9.4	11.0x	1.0x
Telecommunication	4,400	4,417	-16.98	-0.38%	3	510,593	7.4%	32.8	0.6%	10.6x	3.6x	BATBC	121,500	3.5%	8.3	20.9x	2.1x
Pharmaceutical	3,076	3,085	-9.00	-0.29%	34	580,667	8.5%	608.1	10.6%	10.6x	1.5x	MARICO	83,944	2.4%	2.7	7.5x	18.2x
Fuel & Power	1,092	1,091	+1.34	+0.12%	23	288,307	4.2%	106.7	1.9%	9.3x	0.6x	BERGERPBL	72,024	2.1%	1.6	15.4x	3.4x
Cement	1,952	1,938	+14.25	+0.74%	7	91,836	1.3%	79.2	1.4%	21.3x	2.1x	UPGDCL	65,911	1.9%	1.1	7.1x	1.4x
Services & Real Estate	1,154	1,146	+7.98	+0.70%	9	62,818	0.9%	111.7	1.9%	25.6x	0.5x	BXPBARMA	65,668	1.9%	98.6	7.6x	1.1x
Engineering	2,523	2,527	-3.37	-0.13%	42	282,856	4.1%	319.5	5.5%	14.9x	0.8x	PUBALIBANK	59,502	1.7%	0.0	5.0x	0.8x
Food & Allied	12,200	12,198	+1.39	+0.01%	21	222,714	3.2%	138.8	2.4%	32.6x	3.3x	CITYBANK	52,307	1.5%	53.5	3.4x	0.8x
IT	2,333	2,356	-22.19	-0.94%	11	30,899	0.5%	81.3	1.4%	50.3x	1.9x	RENATA	51,327	1.5%	4.5	18.8x	1.4x
Textile	1,397	1,379	+17.97	+1.30%	58	145,289	2.1%	1,658.1	28.8%	NM	1.0x	DUTCHBANGL	46,083	1.3%	5.4	3.5x	0.7x
Paper & Printing	4,401	4,471	-70.05	-1.57%	6	20,613	0.3%	36.8	0.6%	NM	1.4x	ISLAMIBANK	42,987	1.2%	0.6	NM	0.7x
Tannery	2,049	2,054	-4.37	-0.21%	6	23,796	0.3%	41.8	0.7%	NM	1.5x	UNILEVERCL	38,088	1.1%	0.2	62.2x	23.4x
Jute	13,603	13,587	+15.91	+0.12%	3	2,967	0.0%	37.0	0.6%	NM	1.8x	EBL	37,312	1.1%	11.2	4.1x	0.7x
Ceramics	444	447	-2.87	-0.64%	5	20,051	0.3%	55.4	1.0%	NM	1.3x	POWERGRID	34,633	1.0%	1.8	8.6x	0.3x
Miscellaneous	2,442	2,437	+4.31	+0.18%	15	132,592	1.9%	169.4	2.9%	37.5x	1.0x	PRIMEBANK	34,121	1.0%	22.7	3.7x	0.7x
Corporate Bond**	18,166	18,168	-1.36	-0.01%	16	40,191	0.6%	0.5	0.0%	NM	NM	ICB	33,216	1.0%	1.1	NM	1.2x
Treasury Bond**	2,184	2,197	-13.40	-0.61%	232	3,354,365	48.9%	9.8	0.2%	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	
MIDASFIN	5.0	+8.7%	1.1	NM	NM	SQURPHARMA	107,631	7.3%	7.5x	1.3x	SAIHAMTEX	40.5	+5.7%	337.1	65.3x	0.9x	
SAIHAMCOT	24.0	+7.6%	185.0	26.4x	0.6x	BRACBANK	79,618	5.4%	6.5x	1.3x	IPDC	35.6	+0.3%	216.8	29.9x	2.1x	
PREMIERCEM	43.0	+6.2%	43.5	16.5x	0.7x	BXPHARMA	45,882	3.1%	7.6x	1.1x	SAIHAMCOT	24.0	+7.6%	185.0	26.4x	0.6x	
SIPLC	160.3	+6.1%	59.9	31.5x	5.3x	ISLAMIBANK	42,909	2.9%	NM	0.7x	PTL	80.8	+1.8%	155.3	12.7x	1.7x	
DULAMIACOT	221.4	+5.9%	19.5	NM	NM	WALTONHIL	40,712	2.8%	11.0x	1.0x	ORIONINFU	268.7	-4.6%	149.3	NM	16.6x	
BDTHAIFOOD	20.0	+5.82%	24.8	NM	1.7x	PUBALIBANK	40,538	2.8%	5.0x	0.8x	SHARPIND	18.7	+5.1%	141.6	NM	2.4x	
SAIHAMTEX	40.5	+5.7%	337.1	65.3x	1x	CITYBANK	36,422	2.5%	3.4x	0.8x	APEXSPINN	374.8	-1.2%	141.3	NM	4.5x	
SHARPIND	18.7	+5.1%	141.6	NM	2.4x	GP	32,650	2.2%	9.3x	5.8x	RELIANCINS	107.8	-3.1%	135.2	11.3x	1.3x	
ARAMITCEM	11.3	+4.6%	0.6	NM	NM	BATBC	32,137	2.2%	20.9x	2.1x	BRACBANK	64.6	-	133.8	6.5x	1.3x	
MATINSPINN	68.2	+4.6%	54.5	15.5x	1.0x	EBL	25,581	1.7%	4.1x	0.7x	MALEKSPIN	48.0	+0.4%	124.0	8.5x	0.7x	
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,001	1.7%	18.8x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)	
HFL	11.1	-6.7%	1.3	NM	0.4x	LHB	22,109	1.5%	12.3x	3.3x	BRACBANK	64.6	64.6	5.0	1,500	96.90	
PLFSL	1.6	-5.9%	2.9	NM	NM	PRIMEBANK	21,316	1.5%	3.7x	0.7x	DHAKABANK	11.3	11.3	1.0	7,575	85.60	
PREMIERLEA	1.9	-4.7%	5.3	NM	0.9x	UCB	18,404	1.3%	3.8x	0.5x	JAMUNABANK	22.9	22.9	1.0	2,180	49.92	
VAMLRBBF	8.2	-4.7%	5.3	NM	0.9x	OLYMPIC	17,891	1.2%	15.1x	2.1x	IPDC	38.9	38.9	3.0	1,198	46.60	
ORIONINFU	268.7	-4.6%	149.3	NM	16.6x	UTTARABANK	17,357	1.2%	NM	0.7x	GREENDELT	66.1	66.1	2.0	700	46.27	
TALLUSPIN	6.6	-4.3%	2.1	NM	0.6x	ROBI	15,661	1.1%	15.0x	2.4x	BATBC	225.7	225.6	2.0	179	40.47	
KPPL	13.5	-3.6%	1.3	NM	NM	ALARABANK	14,958	1.0%	19.6x	0.7x	SAIHAMTEX	39.5	37.0	12.0	975	37.45	
APOLOISPAT	2.7	-3.6%	0.7	NM	0.1x	BSRMLTD	14,952	1.0%	4.3x	0.5x	CITYGENINS	130.6	120.0	7.0	277	34.42	
DAFODILCOM	155.1	-3.5%	12.9	NM	11.8x	BEACONPHAR	13,906	0.9%	15.9x	3.0x	DGIC	44.5	40.0	5.0	630	25.32	
KBPPWBIL	35.7	-3.5%	47.6	51.7x	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						PREMIERBAN	5.1	5.1	2.0	4,200	21.42

* 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
BRACBANK	64.6	64.6	96.9	1,500	5
DHAKABANK	11.3	11.3	85.6	7,575	1
JAMUNABANK	22.9	22.9	49.9	2,180	1
IPDC	38.9	38.9	46.6	1,198	3
GREENDELT	66.1	66.1	46.3	700	2
BATBC	225.7	225.6	40.5	179	2
SAIHAMTEX	39.5	37.0	37.4	975	12
CITYGENINS	130.6	120.0	34.4	277	7
DGIC	44.5	40.0	25.3	630	5
PREMIERBAN	5.1	5.1	21.4	4,200	2
MARICO	2,640.0	2,620.0	13.2	5	5
SQURPHARMA	217.6	217.6	10.9	50	1
SIPLC	158.0	140.0	10.8	70	2
ASIAINS	45.7	45.7	8.7	190	1
BNICL	155.0	155.0	7.3	47	1
APEXSPINN	369.0	368.0	7.0	19	2
TAKAFULINS	53.2	53.2	6.4	120	1
PTL	78.9	75.0	6.3	83	4
CITYBANK	33.0	33.0	5.0	150	1
ASIATICLAB	111.0	111.0	3.1	28	1
SONALILIFE	84.5	84.5	2.7	33	1
DUTCHBANGL	47.0	47.0	2.0	43	1
Total			583.8		79

Important DSE News
TALLUSPIN

The Board of Directors has recommended No Dividend for the year ended June 30, 2026. Date of AGM: 12.11.2026; Time: 12:00 PM; Venue: Hybrid Platform (Chuadanga). Record Date: 19.10.2026. The Company has also reported EPS of Tk. (2.84), NAV per share of Tk. 10.51 and NOCFPS of Tk. 0.007 for the year ended June 30, 2026 as against Tk. (2.79), Tk. 13.34 and Tk. (0.03) respectively for the year ended June 30, 2025.

BANGAS

The Board of Directors has recommended 3% Cash Dividend to General Shareholders except Directors and Sponsors for the year ended June 30, 2026. The Sponsors and Directors hold 1,756,454 shares out of a total 76,24,643 shares of the company, and the Cash Dividend payable to the General Shareholders is Tk. 1,760,378. Date of AGM: 12.11.2026, Time: 11:00 AM, Venue: Hybrid Platform (Chuadanga). Record Date: 19.10.2026. The Company has also reported EPS of Tk. 0.24, NAV per share of Tk. 21.10 and NOCFPS of Tk. (0.52) for the year ended June 30, 2026 as against Tk. 0.28, Tk. 21.02 and Tk. 0.38 respectively for the year ended June 30, 2025.

ACI

The company has informed that the Board of Directors of the Company, at its 232nd Board Meeting held on Monday, 28 September 2026 at 4:00 pm through Hybrid system, has approved an additional equity investment of BDT 600 million in ACI CO-RO BANGLADESH LTD., an existing Joint Venture of the Company. The said investment will be made subject to the approval of the concerned regulatory authority.

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
APEXFOOT		15.0%	15.0%	Record Date	15-Oct-26
BANGAS		0.0%	3.0%	Record Date	19-Oct-26
ENVOYTEX		0.0%	32.5%	Record Date	26-Oct-26

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