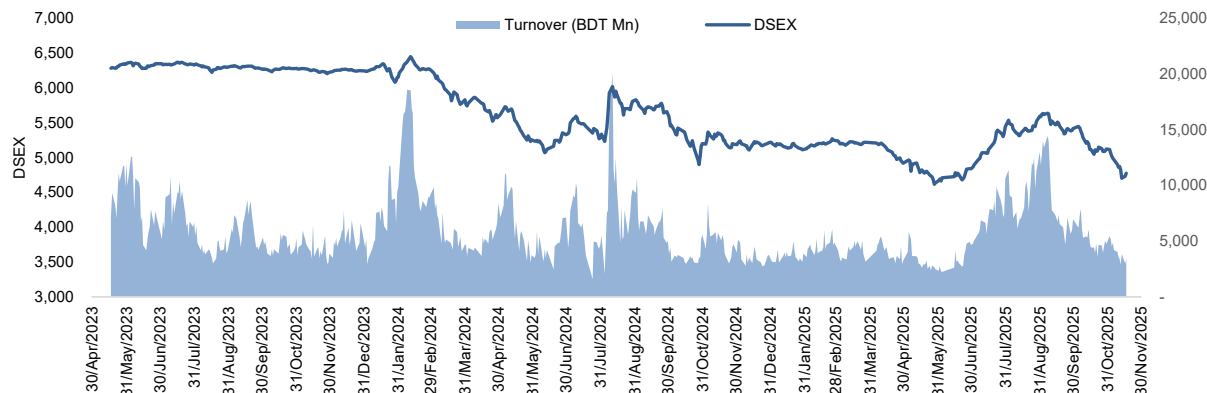


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.90%) gained 42.8 points and closed at 4,774.96. The blue-chip index DS30 (+0.50%), the Shariah-based index DSES (+1.55%), and the large-cap index CDSET (+0.24%) closed at 1,869.90, 1,000.42, and 1,006.45 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.71% followed by Engineering (+1.61%), Bank (+1.00%), Fuel & Power (+0.99%), Food & Allied (+0.70%), Telecommunication (+0.63%), and Pharmaceutical (-0.63%), respectively. Block trades contributed 7.7% of the overall market turnover. Square Pharmaceuticals Ltd. (-4.6%) was the most traded share with a turnover of BDT 150 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,774.96	4,732.16	+42.80	+0.90%	-8.5%
DS30	1,869.90	1,860.53	+9.37	+0.50%	-3.6%
DSES	1,000.42	985.12	+15.30	+1.55%	-14.4%
CDSET	1,006.45	1,004.02	+2.43	+0.24%	-5.6%

	Advanced	Declined	Unchanged	Total
All Category	322	35	16	373
A Category (Equity)	170	27	8	205
B Category (Equity)	65	3	5	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	87	5	3	95
Mutual Funds	33	1	1	35
Corporate Bonds	0	2	0	2
Treasury Bonds	1	3	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,781,797	6,749,252	+0.5%
	Mn USD	55,484	55,218	
Turnover	Mn BDT	3,481	2,981	+16.8%
	Mn USD	28	24	
Volume	Mn Shares	116	122	-4.4%
No. of Trade		139,022	125,309	+10.9%

* Average Interbank Exchange Rate is BDT 122.23 as of Nov 17, 2025

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Figure: Sectorial Turnover (BDT Mn)

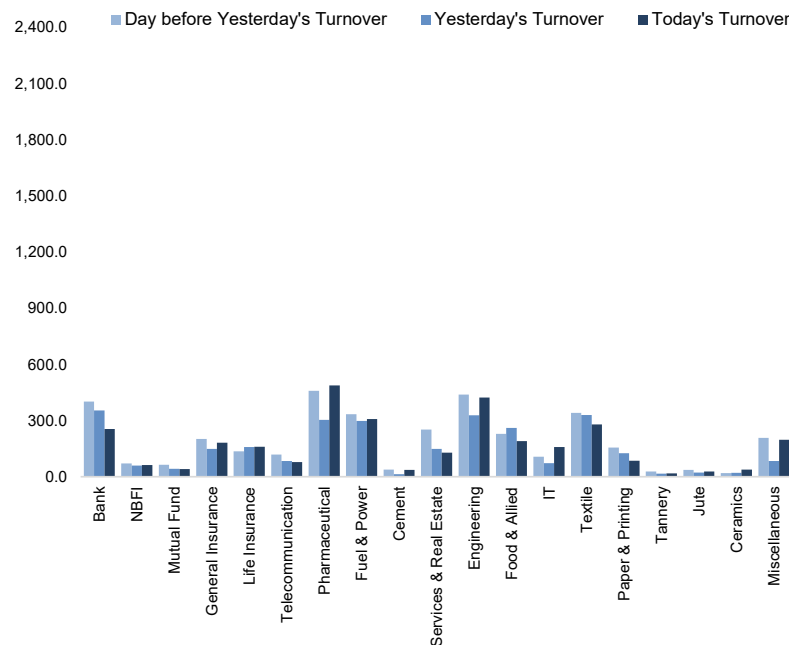
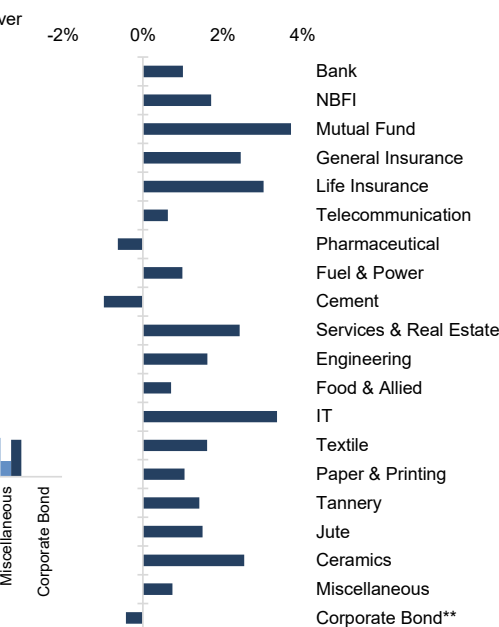


Figure: Sectorial Mcap Change



Market PE 13.5x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, several 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	1,334	1,321	+13.25	+1.00%	36	631,419	9.4%	254.7	7.9%	NM	0.7x	GP	367,147	11.4%	13.9	12.5x	7.4x
NBFI	876	862	+14.75	+1.71%	23	83,512	1.2%	62.0	1.9%	NM	NM	SQURPHARMA	180,127	5.6%	149.8	7.1x	1.2x
Mutual Fund	463	446	+16.56	+3.71%	37	22,174	0.3%	40.4	1.3%	NM	0.4x	ROBI	144,567	4.5%	45.8	15.7x	2.2x
General Insurance	2,611	2,549	+62.54	+2.45%	43	74,521	1.1%	181.1	5.6%	12.3x	1.1x	BATBC	131,976	4.1%	17.8	11.5x	2.3x
Life Insurance	1,611	1,563	+47.29	+3.03%	15	42,834	0.6%	160.2	5.0%	NM	NM	BRACBANK	130,207	4.0%	24.2	8.3x	1.3x
Telecommunication	4,574	4,545	+28.57	+0.63%	3	536,347	8.0%	77.9	2.4%	13.2x	4.0x	WALTONHIL	123,059	3.8%	9.2	10.9x	0.9x
Pharmaceutical	2,785	2,803	-17.52	-0.63%	34	528,018	7.8%	487.0	15.2%	11.4x	1.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Fuel & Power	1,038	1,028	+10.20	+0.99%	23	274,995	4.1%	308.1	9.6%	8.4x	0.6x	MARICO	86,203	2.7%	1.5	13.9x	28.9x
Cement	1,763	1,780	-17.39	-0.98%	7	84,003	1.2%	35.9	1.1%	20.3x	1.8x	UPGDCL	71,071	2.2%	0.0	5.9x	1.7x
Services & Real Estate	961	939	+22.74	+2.42%	9	52,877	0.8%	128.9	4.0%	16.8x	0.4x	BERGERPBL	68,724	2.1%	1.5	21.5x	3.9x
Engineering	2,220	2,184	+35.26	+1.61%	42	250,400	3.7%	423.3	13.2%	13.0x	0.7x	LHB	54,701	1.7%	24.6	13.5x	2.9x
Food & Allied	12,752	12,663	+89.14	+0.70%	21	233,745	3.5%	190.2	5.9%	18.7x	3.5x	BXPBARMA	47,199	1.5%	12.2	7.4x	1.0x
IT	1,580	1,529	+51.41	+3.36%	11	20,842	0.3%	159.3	5.0%	22.0x	1.3x	RENATA	44,215	1.4%	0.0	18.7x	1.2x
Textile	972	956	+15.40	+1.61%	58	101,202	1.5%	279.9	8.7%	67.2x	0.7x	UNILEVERCL	42,681	1.3%	0.9	59.1x	20.6x
Paper & Printing	4,065	4,023	+42.06	+1.05%	6	18,365	0.3%	85.4	2.7%	NM	1.0x	PUBALIBANK	36,570	1.1%	5.5	5.9x	0.5x
Tannery	1,800	1,774	+25.12	+1.42%	6	20,833	0.3%	17.6	0.5%	NM	1.4x	CITYBANK	36,357	1.1%	44.1	2.8x	0.6x
Jute	12,047	11,869	+177.52	+1.50%	3	2,652	0.0%	27.8	0.9%	NM	NM	DUTCHBANGL	35,865	1.1%	1.3	7.3x	0.7x
Ceramics	349	341	+8.65	+2.54%	5	15,677	0.2%	38.7	1.2%	NM	1.0x	EBL	35,427	1.1%	20.9	4.5x	0.8x
Miscellaneous	3,879	3,851	+28.63	+0.74%	15	210,827	3.1%	197.5	6.2%	98.8x	1.6x	ICB	33,563	1.0%	4.5	NM	1.1x
Corporate Bond**	16,734	16,805	-70.88	-0.42%	16	36,946	0.5%	0.1	0.0%	NM	NM	PRIMEBANK	31,104	1.0%	9.4	3.6x	0.7x
Treasury Bond**	2,311	2,307	+4.36	+0.19%	233	3,503,439	51.9%	55.0	1.7%	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
FAREASTFIN	0.7	+10.6%	0.2	NM	NM	SQURPHARMA	104,510	7.3%	7.1x	1.2x	SQURPHARMA	203.2	-4.6%	149.8	7.1x	1.2x
KPPL	9.9	+10.0%	2.2	NM	NM	BRACBANK	73,520	5.2%	8.3x	1.3x	ANWARGALV	85.8	+1.2%	127.8	NM	20.2x
FAREASTLIF	17.6	+10.0%	1.2	NM	NM	BEXIMCO	69,465	4.9%	NM	1.3x	KBPPWBIL	59.3	+5.0%	107.2	NM	4.8x
RINGSHINE	2.2	+10.0%	1.2	NM	NM	ISLAMIBANK	62,516	4.4%	NM	0.8x	RUNNERAUTO	38.4	-4.0%	97.6	19.2x	0.6x
MAKSONSPIN	4.4	+10.0%	0.5	NM	0.6x	WALTONHIL	50,579	3.6%	10.9x	0.9x	ORIONINFU	340.7	+2.6%	87.4	NM	20.5x
HFL	4.4	+10.00%	0.2	NM	0.1x	GP	38,875	2.7%	12.5x	7.4x	LOVELLO	72.1	+9.6%	80.7	41.1x	5.8x
FIRSTFIN	2.2	+10.0%	0.1	NM	NM	BATBC	36,336	2.6%	11.5x	2.3x	SIMTEX	31.8	+7.1%	78.2	31.5x	1.4x
GPHISPAT	16.7	+9.9%	11.7	21.2x	0.3x	BXPBARMA	34,505	2.4%	7.4x	1.0x	SAPORTL	45.7	+1.6%	73.1	17.3x	1.3x
INTECH	21.2	+9.8%	23.1	NM	NM	PUBALIBANK	25,230	1.8%	5.9x	0.5x	BPPL	14.9	+4.2%	68.1	6.9x	0.5x
SKTRIMS	6.7	+9.8%	0.2	NM	0.5x	CITYBANK	25,210	1.8%	2.8x	0.6x	MONOSPOOL	106.3	-0.8%	65.9	27.9x	2.3x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,107	1.8%	18.7x	1.2x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FEKDIL	14.4	-10.0%	7.0	34.3x	0.7x	LHB	21,812	1.5%	13.5x	2.9x	PRIMEBANK	26.9	26.9	5.0	2,700	72.63
PHOENIXFIN	1.9	-5.0%	0.6	NM	0x	PRIMEBANK	20,145	1.4%	3.6x	0.7x	KBPPWBIL	51.5	51.0	4.0	1,015	51.77
SQURPHARMA	203.2	-4.0%	97.6	19.2x	0.6x	OLYMPIC	19,861	1.4%	14.3x	2.2x	KBPPWBIL	51.5	51.0	4.0	1,015	51.77
RUNNERAUTO	38.4	-4.0%	97.6	19.2x	0.6x	ALARABANK	15,936	1.1%	40.7x	0.7x	MONNOCERA	73.0	72.8	17.0	280	20.38
CROWNCEMNT	46.4	-3.9%	1.8	9.8x	0.7x	ROBI	15,347	1.1%	15.7x	2.2x	FINEFOODS	270.3	265.0	6.0	57	15.12
PREMIERLEA	0.8	-3.7%	0.0	NM	NM	UTTARABANK	14,718	1.0%	NM	0.7x	GQBALLPEN	454.0	385.0	3.0	27	11.85
SQUARETEXT	48.1	-3.4%	6.6	6.8x	0.8x	BEACONPHAR	14,601	1.0%	21.7x	3.3x	BRACBANK	66.1	66.1	1.0	150	9.92
LHB	47.1	-2.5%	24.6	13.5x	2.9x	UCB	13,924	1.0%	4.0x	0.4x	SUNLIFEINS	45.0	44.0	3.0	127	5.58
UNILEVERCL	2,214.4	-2.4%	0.9	59.1x	20.6x	BSRMLTD	13,247	0.9%	3.7x	0.4x	DOMINAGE	20.7	20.7	2.0	205	4.24
SPCL	48.8	-2.0%	61.2	13.6x	1.2x	* 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
PRIMEBANK	26.9	26.9	72.6	2,700	5
KBPPWBIL	51.5	51.0	51.8	1,015	4
KBPPWBIL	51.5	51.0	51.8	1,015	4
MONNOCERA	73.0	72.8	20.4	280	17
FINEFOODS	270.3	265.0	15.1	57	6
GQBALLPEN	454.0	385.0	11.9	27	3
BRACBANK	66.1	66.1	9.9	150	1
SUNLIFEINS	45.0	44.0	5.6	127	3
DOMINAGE	20.7	20.7	4.2	205	2
SONALILIFE	53.7	53.7	4.1	77	1
ACI	190.0	190.0	3.9	21	1
ASIATICLAB	53.9	53.9	3.2	60	1
NBL	2.2	2.2	2.2	1,000	1
SQURPHARMA	231.7	231.7	2.1	9	1
SEAPEARL	34.8	34.8	1.2	35	1
ISNLTD	80.0	80.0	1.0	13	2
SHYAMPSUG	162.7	162.7	1.0	6	1
PIONEERINS	45.5	45.5	0.9	20	1
FEKDIL	17.6	17.6	0.9	50	1
AL-HAJTEX	124.0	124.0	0.9	7	1
ACMEPL	14.9	14.9	0.9	58	1
CAPMBDBLMF	10.5	10.5	0.5	50	1
Total			269.6		76

Important DSE News

MAGURAPLEX

(Q1 Un-audited): EPS was Tk. 0.88 for July-September 2025 as against Tk. 1.02 for July-September 2024. NOCFPS was Tk. 0.24 for July-September 2025 as against Tk. 0.35 for July-September 2024. NAV per share was Tk. 75.67 as on September 30, 2025 and Tk. 74.79 as on June 30, 2025.

MONOSPOOL

(Q1 Un-audited): EPS was Tk. 1.19 for July-September 2025 as against Tk. 1.14 for July-September 2024; NOCFPS was Tk. 0.28 for July-September 2025 as against Tk. 0.07 for July-September 2024. NAV per share was Tk. 46.25 as on September 30, 2025 and Tk. 45.05 as on June 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SONARGAON		0.0%	0.0%	Record Date	18-Nov-25
KPCL		0.0%	5.0%	Record Date	18-Nov-25
DESHBANDHU		0.0%	0.0%	Record Date	18-Nov-25
NAHEEACP		0.0%	1.0%	Record Date	18-Nov-25
AFTABAUTO		0.0%	10.0%	Record Date	18-Nov-25
NAVANACNG		0.0%	10.0%	Record Date	18-Nov-25
ZAHEENSPIN		0.0%	0.0%	Record Date	18-Nov-25
RAHIMAFOOD		0.0%	2.0%	Record Date	18-Nov-25
ACMELAB		0.0%	35.0%	Record Date	18-Nov-25
UNIQUEHRL		0.0%	16.0%	Record Date	18-Nov-25
MEGCONMILK		0.0%	0.0%	Record Date	18-Nov-25
MEGHNA PET		0.0%	0.0%	Record Date	18-Nov-25
DSHGARME		0.0%	3.0%	Record Date	18-Nov-25
BATASHOE		0.0%	143.0%	Record Date	18-Nov-25
FARCHEM		0.0%	0.0%	Record Date	18-Nov-25
FINEFOODS		0.0%	14.0%	Record Date	18-Nov-25
DOREENPWR		0.0%	10.0%	Record Date	19-Nov-25

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