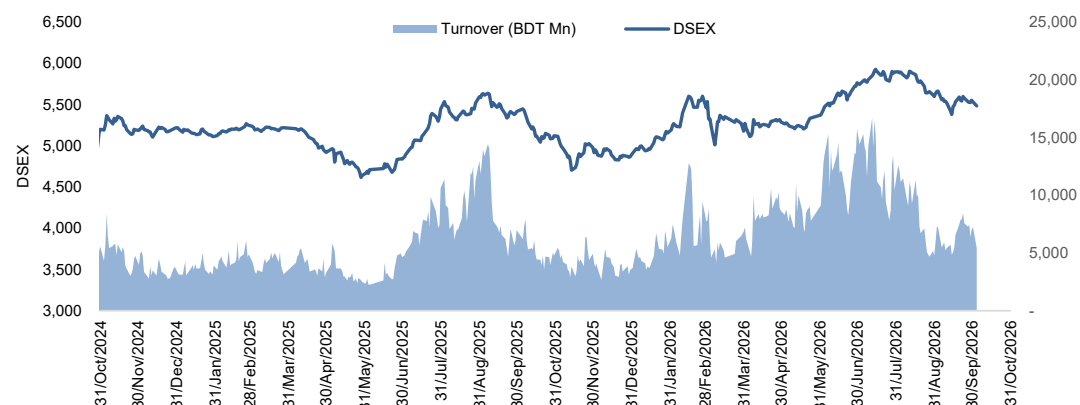


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.89%) lost 49.28 points and closed at 5,482.36. The blue-chip index DS30 (-0.87%), the Shariah-based index DSES (-0.96%), and the large-cap index CDSET (-0.78%) closed at 2,085.29, 1,089.68, and 1,094.66 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.02% followed by Bank (-0.87%), Pharmaceutical (-0.73%), Food & Allied (-0.66%), Fuel & Power (-0.49%), Telecommunication (-0.24%), and NBFI (+2.29%), respectively. Block trades contributed 5.6% of the overall market turnover. Saiham Textile Mills Ltd. (+3.8%) was the most traded share with a turnover of BDT 188 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,482.36	5,531.65	-49.28	-0.89%	+12.7%
DS30	2,085.29	2,103.55	-18.25	-0.87%	+12.5%
DSES	1,089.68	1,100.26	-10.58	-0.96%	+8.9%
CDSET	1,094.66	1,103.26	-8.60	-0.78%	+8.9%

	Advanced	Declined	Unchanged	Total
All Category	66	291	28	385
A Category (Equity)	34	152	7	193
B Category (Equity)	14	59	1	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	18	80	20	118
Mutual Funds	4	27	1	32
Corporate Bonds	2	0	0	2
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,781,780	6,859,358	-1.1%
	Mn USD	55,044	55,673	
Turnover	Mn BDT	5,430	7,231	-24.9%
	Mn USD	44	59	
Volume	Mn Shares	171	230	-25.5%
No. of Trade		171,907	184,783	-7.0%

* Average Interbank Exchange Rate is BDT 123.21 as of Oct 04, 2026

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Figure: Sectorial Turnover (BDT Mn)

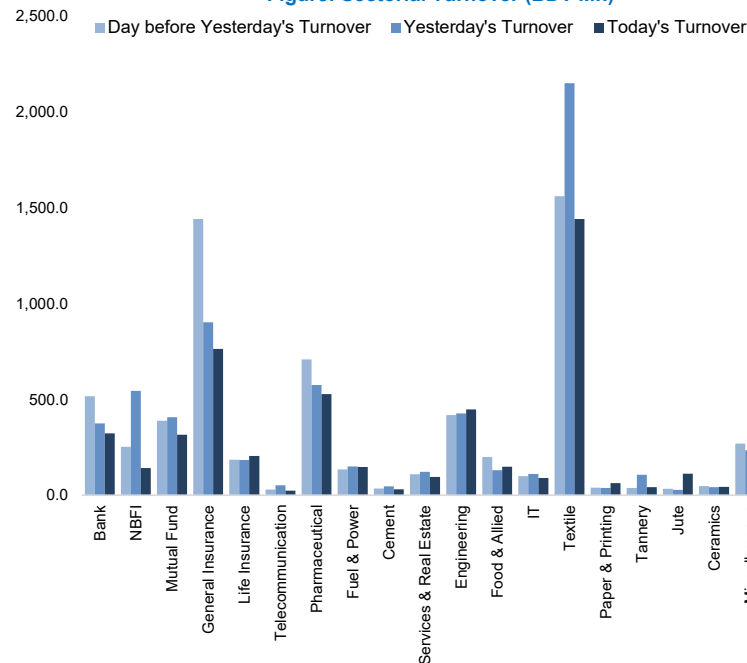
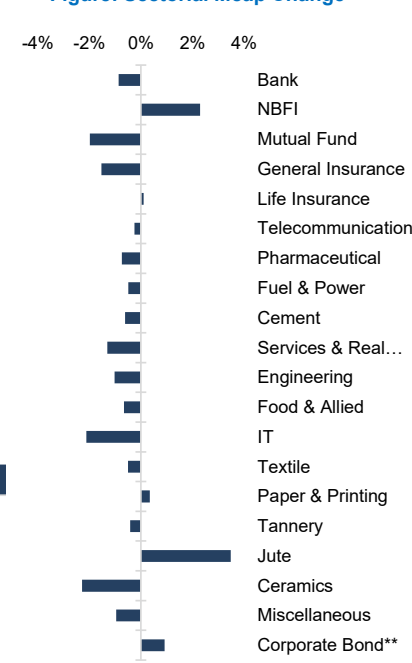


Figure: Sectorial Mcap Change



Market PE 12.9x

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	1,532	1,545	-13.37	-0.87%	36	730,201	10.8%	323.1	6.3%	7.2x	0.7x	GP	325,152	9.4%	8.7	9.2x	5.8x
NBFI	1,088	1,063	+24.39	+2.29%	23	103,447	1.5%	142.1	2.8%	NM	1.1x	SQURPHARMA	193,246	5.6%	55.8	7.5x	1.3x
Mutual Fund	665	679	-13.43	-1.98%	34	30,959	0.5%	315.3	6.2%	NM	0.6x	ROBI	157,138	4.5%	14.5	15.0x	2.4x
General Insurance	4,478	4,548	-69.67	-1.53%	43	126,515	1.9%	763.8	14.9%	18.6x	1.7x	BRACBANK	148,822	4.3%	61.6	6.6x	1.3x
Life Insurance	1,709	1,707	+1.77	+0.10%	15	48,162	0.7%	204.4	4.0%	NM	NM	WALTONHIL	122,242	3.5%	10.5	10.9x	1.0x
Telecommunication	4,387	4,398	-10.75	-0.24%	3	509,093	7.5%	24.4	0.5%	10.5x	3.6x	BATBC	119,556	3.5%	8.2	20.6x	2.1x
Pharmaceutical	3,062	3,084	-22.61	-0.73%	34	577,921	8.5%	527.5	10.3%	10.5x	1.5x	MARICO	83,516	2.4%	7.6	7.4x	18.1x
Fuel & Power	1,087	1,092	-5.30	-0.49%	23	286,833	4.2%	147.8	2.9%	9.2x	0.6x	BERGERPBL	71,690	2.1%	1.0	15.4x	3.3x
Cement	1,947	1,959	-11.93	-0.61%	7	91,605	1.3%	31.3	0.6%	21.3x	2.1x	UPGDCL	65,564	1.9%	0.9	7.1x	1.4x
Services & Real Estate	1,118	1,133	-14.70	-1.30%	9	60,826	0.9%	95.3	1.9%	24.8x	0.4x	BXPBARMA	64,463	1.9%	91.9	7.5x	1.1x
Engineering	2,494	2,520	-25.70	-1.02%	42	279,535	4.1%	448.2	8.7%	14.7x	0.8x	PUBALIBANK	59,033	1.7%	22.6	4.9x	0.8x
Food & Allied	12,057	12,137	-79.55	-0.66%	21	220,112	3.2%	148.7	2.9%	32.2x	3.3x	CITYBANK	51,957	1.5%	25.4	3.4x	0.8x
IT	2,289	2,339	-49.43	-2.11%	11	30,319	0.4%	89.8	1.8%	49.4x	1.9x	RENATA	50,994	1.5%	5.5	18.7x	1.4x
Textile	1,403	1,410	-6.99	-0.50%	58	145,946	2.2%	1,442.1	28.1%	NM	1.0x	DUTCHBANGL	46,184	1.3%	10.1	3.5x	0.7x
Paper & Printing	4,422	4,406	+15.31	+0.35%	6	20,710	0.3%	62.9	1.2%	NM	1.4x	ISLAMIBANK	42,504	1.2%	1.2	NM	0.7x
Tannery	2,061	2,069	-8.60	-0.42%	6	23,930	0.4%	42.1	0.8%	NM	1.5x	UNILEVERCL	38,019	1.1%	0.1	62.1x	23.3x
Jute	13,886	13,418	+468.34	+3.49%	3	3,029	0.0%	112.4	2.2%	NM	1.9x	EBL	37,476	1.1%	51.6	4.2x	0.7x
Ceramics	431	441	-10.05	-2.28%	5	19,460	0.3%	43.9	0.9%	NM	1.3x	ICB	36,512	1.1%	8.8	NM	1.4x
Miscellaneous	2,429	2,452	-23.55	-0.96%	15	131,892	1.9%	159.7	3.1%	37.3x	1.0x	PRIMEBANK	34,243	1.0%	15.9	3.7x	0.7x
Corporate Bond**	18,395	18,227	+167.91	+0.92%	16	40,698	0.6%	0.5	0.0%	NM	NM	POWERGRID	33,902	1.0%	1.1	8.4x	0.2x
Treasury Bond**	2,151	2,188	-36.17	-1.65%	232	3,304,614	48.7%	0.2	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
ICB	42.1	+9.9%	8.8	NM	1.4x	SQURPHARMA	107,928	7.4%	7.5x	1.3x	SAIHAMTEX	44.1	+3.8%	187.8	71.1x	1.0x
BDLAMPS	248.0	+8.7%	71.0	NM	5.3x	BRACBANK	80,111	5.5%	6.6x	1.3x	PTL	79.8	-2.6%	148.7	12.6x	1.7x
SONARBAINS	42.1	+7.7%	62.5	NM	2.0x	BXPBARMA	45,040	3.1%	7.5x	1.1x	MALEKSPIN	50.3	+0.6%	136.0	8.9x	0.8x
SONALILIFE	97.2	+7.2%	119.2	NM	NM	ISLAMIBANK	42,427	2.9%	NM	0.7x	DOMINAGE	65.8	-0.5%	135.8	NM	3.9x
NURANI	3.0	+7.1%	2.8	NM	0.3x	PUBALIBANK	40,219	2.8%	4.9x	0.8x	SONALILIFE	97.2	+7.2%	119.2	NM	NM
ZAHINTEX	7.9	+6.76%	0.8	NM	1.1x	CITYBANK	36,178	2.5%	3.4x	0.8x	SIPLC	144.9	-4.2%	116.0	28.5x	4.8x
KTL	14.1	+6.0%	35.1	NM	1x	WALTONHIL	35,340	2.4%	10.9x	1.0x	SONALIANSH	227.7	+4.4%	112.2	63.1x	1.0x
ICBAMCL2ND	10.1	+5.2%	17.3	NM	1.1x	GP	32,515	2.2%	9.2x	5.8x	MATINSPIINN	71.6	+5.0%	111.7	16.3x	1.0x
MATINSPIINN	71.6	+5.0%	111.7	16.3x	1.0x	BATBC	31,623	2.2%	20.6x	2.1x	SAIHAMCOT	23.2	-2.9%	103.0	25.5x	0.6x
SAFKOSPIINN	22.2	+4.7%	14.5	92.5x	NM	EBL	26,443	1.8%	4.2x	0.7x	IPDC	32.5	-1.8%	100.7	27.3x	1.9x
						RENATA	24,839	1.7%	18.7x	1.4x						
						LHB	22,637	1.6%	12.3x	3.3x						
						PRIMEBANK	22,073	1.5%	3.7x	0.7x						
						UCB	18,197	1.3%	3.8x	0.5x						
						OLYMPIC	17,879	1.2%	15.0x	2.1x						
						UTTARABANK	17,408	1.2%	NM	0.8x						
						ROBI	15,714	1.1%	15.0x	2.4x						
						BSRMLTD	14,637	1.0%	4.3x	0.5x						
						BEACONPHAR	13,962	1.0%	16.0x	3.0x						
						JAMUNABANK	13,497	0.9%	3.4x	0.7x						
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)
SAIFPOWER	6.9	-9.2%	10.0	19.7x	0.4x						SAIHAMTEX	43.3	40.1	14.0	1,672	69.40
ISNLTD	48.3	-8.5%	16.1	NM	23x						NHFL	26.5	26.5	1.0	1,600	42.40
PRIMEFIN	2.6	-6.2%	0.5	NM	0.1x						MARICO	2,640.0	2,640.0	12.0	12	30.36
RSRMSTEEL	6.1	-6.2%	0.5	NM	0.1x						BNICL	184.0	175.0	2.0	115	21.10
BIFC	3.1	-6.1%	0.3	NM	NM						BDLAMPS	235.2	224.8	16.0	73	16.52
NBL	3.2	-5.9%	1.0	NM	NM						PTL	84.8	81.0	3.0	142	11.62
PLFSL	1.7	-5.6%	0.8	NM	NM						MATINSPIINN	67.0	67.0	5.0	170	11.39
MBL1STMF	10.2	-5.6%	41.3	NM	1.1x						SQURPHARMA	217.3	217.3	1.0	50	10.87
ORIONINFU	243.8	-5.4%	95.7	NM	15.0x						SONALILIFE	96.0	93.3	5.0	109	10.39
REGENTTEX	5.6	-5.1%	0.3	NM	0.2x						ROBI	33.1	33.1	5.0	250	8.28

* 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
SAIHAMTEX	43.3	40.1	69.4	1,672	14
NHFIL	26.5	26.5	42.4	1,600	1
MARICO	2,640.0	2,640.0	30.4	12	12
BNICL	184.0	175.0	21.1	115	2
BDLAMPS	235.2	224.8	16.5	73	16
PTL	84.8	81.0	11.6	142	3
MATINSPINN	67.0	67.0	11.4	170	5
SQURPHARMA	217.3	217.3	10.9	50	1
SONALILIFE	96.0	93.3	10.4	109	5
ROBI	33.1	33.1	8.3	250	5
ASIATICLAB	106.5	95.1	8.2	81	4
PRIMEBANK	28.3	28.3	7.1	250	3
KTL	13.0	12.5	6.8	525	5
APEXSPINN	371.1	368.0	6.7	18	2
MLDYEING	12.3	12.3	5.7	463	1
GQBALLPEN	604.8	560.0	4.9	9	3
ENVOYTEX	74.0	69.0	3.8	54	2
ALIF	5.6	5.6	2.5	440	2
PRAGATIINS	81.9	81.9	2.5	30	1
PROVATIINS	55.0	55.0	2.3	42	1
SONARBAINS	36.7	36.7	2.2	60	1
SONALIANSH	220.0	220.0	2.2	10	1
Total			304.3		112

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
AAMRATECH		0.0%	0.3%	Record Date	06-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
IBNSINA		0.0%	77.0%	Record Date	26-Oct-26

Important DSE News
PUBALIBANK

Trouser Line Limited (where Ms. Rana Laila Hafiz is a Director of Pubali Bank PLC. and also the Managing Director of Trouser Line Limited) has expressed its intention to buy 30,00,000 shares of Pubali Bank PLC. at the prevailing market price through the Dhaka Stock Exchange PLC.

SEAPEARL

Refer to their earlier news disseminated by DSE on 28.10.2025 regarding dividend declaration, the company has further informed that the shareholders in the 16th AGM approved a 0.50% cash dividend for the general shareholders, excluding the Sponsor Shareholders of the Company, in place of the 1% cash dividend recommended by the Board of Directors.

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