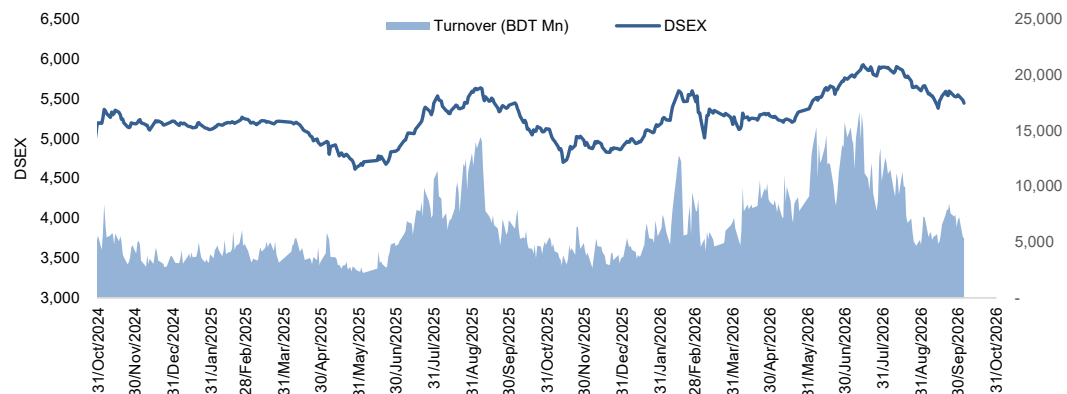


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.68%) lost 37.09 points and closed at 5,445.28. The blue-chip index DS30 (-0.17%), the Shariah-based index DSES (-0.91%), and the large-cap index CDSET (-0.09%) closed at 2,081.75, 1,079.80, and 1,093.71 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.04% followed by Engineering (-0.63%), Pharmaceutical (-0.60%), Fuel & Power (-0.60%), Telecommunication (-0.21%), Food & Allied (-0.11%), and Bank (0.00%), respectively. Block trades contributed 2.9% of the overall market turnover. Paramount Textile Limited (+3.1%) was the most traded share with a turnover of BDT 311 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,445.28	5,482.36	-37.09	-0.68%	+11.9%
DS30	2,081.75	2,085.29	-3.54	-0.17%	+12.3%
DSES	1,079.80	1,089.68	-9.88	-0.91%	+7.9%
CDSET	1,093.71	1,094.66	-0.95	-0.09%	+8.8%

	Advanced	Declined	Unchanged	Total
All Category	54	284	48	386
A Category (Equity)	33	136	24	193
B Category (Equity)	5	69	0	74
N Category (Equity)	1	0	0	1
Z Category (Equity)	15	79	24	118
Mutual Funds	5	12	15	32
Corporate Bonds	2	1	0	3
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,772,520	6,781,780	-0.1%
	Mn USD	54,973	55,048	
Turnover	Mn BDT	5,371	5,430	-1.1%
	Mn USD	44	44	
Volume	Mn Shares	181	171	+5.6%
No. of Trade		172,753	171,907	+0.5%

* Average Interbank Exchange Rate is BDT 123.20 as of Oct 05, 2026

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Figure: Sectorial Turnover (BDT Mn)

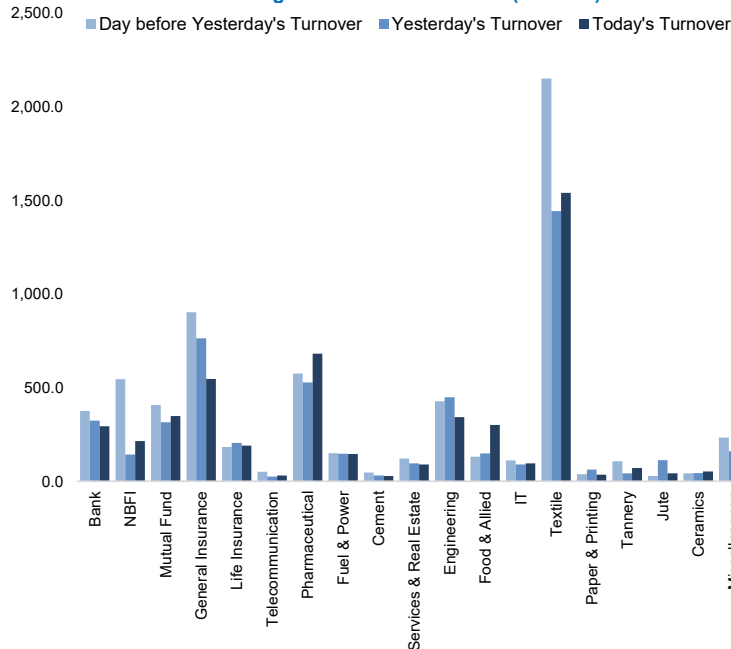
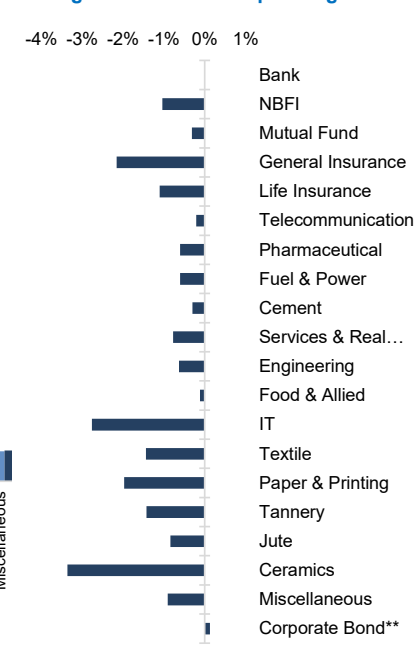


Figure: Sectorial Mcap Change



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	1,532	-0.07	-0.00%	36	730,169	10.8%	293.0	5.6%	7.2x	0.7x	GP	324,342	9.4%	9.0	9.2x	5.8x
NBFI	1,077	1,088	-11.30	-1.04%	23	102,372	1.5%	215.0	4.1%	NM	1.1x	SQURPHARMA	192,892	5.6%	28.2	7.5x	1.3x
Mutual Fund	663	665	-2.07	-0.31%	34	30,862	0.5%	348.3	6.7%	NM	0.6x	ROBI	157,138	4.6%	19.0	15.0x	2.4x
General Insurance	4,381	4,478	-96.51	-2.16%	43	123,788	1.8%	546.3	10.5%	18.2x	1.7x	BRACBANK	148,822	4.3%	82.2	6.6x	1.3x
Life Insurance	1,690	1,709	-18.78	-1.10%	15	47,632	0.7%	190.4	3.7%	NM	NM	WALTONHIL	121,582	3.5%	10.6	10.8x	1.0x
Telecommunication	4,378	4,387	-9.08	-0.21%	3	508,040	7.5%	31.2	0.6%	10.5x	3.6x	BATBC	119,340	3.5%	6.3	20.5x	2.1x
Pharmaceutical	3,043	3,062	-18.47	-0.60%	34	574,435	8.5%	681.4	13.1%	10.5x	1.5x	MARICO	83,815	2.4%	2.5	7.5x	18.2x
Fuel & Power	1,080	1,087	-6.54	-0.60%	23	285,107	4.2%	145.3	2.8%	9.2x	0.6x	BERGERPBL	71,498	2.1%	1.1	15.3x	3.3x
Cement	1,941	1,947	-5.77	-0.30%	7	91,334	1.3%	27.5	0.5%	21.2x	2.1x	UPGDCL	65,506	1.9%	1.4	7.0x	1.4x
Services & Real Estate	1,109	1,118	-8.65	-0.77%	9	60,355	0.9%	90.2	1.7%	24.6x	0.4x	BXPHARMA	63,705	1.8%	40.4	7.4x	1.1x
Engineering	2,478	2,494	-15.68	-0.63%	42	277,777	4.1%	342.7	6.6%	14.6x	0.8x	PUBALIBANK	60,595	1.8%	11.3	5.1x	0.8x
Food & Allied	12,043	12,057	-13.83	-0.11%	21	219,860	3.2%	300.6	5.8%	32.0x	3.2x	CITYBANK	51,957	1.5%	18.2	3.4x	0.8x
IT	2,226	2,289	-63.19	-2.76%	11	29,482	0.4%	95.9	1.8%	48.0x	1.8x	RENATA	50,822	1.5%	3.0	18.6x	1.4x
Textile	1,383	1,403	-20.17	-1.44%	58	143,848	2.1%	1,540.3	29.5%	NM	1.0x	DUTCHBANGL	46,184	1.3%	6.9	3.5x	0.7x
Paper & Printing	4,335	4,422	-87.07	-1.97%	6	20,302	0.3%	35.5	0.7%	NM	1.3x	ISLAMIBANK	41,860	1.2%	4.1	NM	0.7x
Tannery	2,031	2,061	-29.30	-1.42%	6	23,589	0.3%	70.6	1.4%	NM	1.5x	UNILEVERCL	38,071	1.1%	0.1	62.2x	23.3x
Jute	13,769	13,886	-116.88	-0.84%	3	3,003	0.0%	42.8	0.8%	NM	1.9x	EBL	37,476	1.1%	38.0	4.2x	0.7x
Ceramics	416	431	-14.46	-3.36%	5	18,806	0.3%	51.9	1.0%	NM	1.2x	ICB	36,685	1.1%	33.6	NM	1.4x
Miscellaneous	2,407	2,429	-21.98	-0.91%	15	130,698	1.9%	164.0	3.1%	36.9x	1.0x	PRIMEBANK	34,365	1.0%	6.9	3.7x	0.7x
Corporate Bond**	18,419	18,395	+23.79	+0.13%	16	40,751	0.6%	0.5	0.0%	NM	NM	POWERGRID	33,719	1.0%	2.6	8.3x	0.2x
Treasury Bond**	2,158	2,151	+6.36	+0.30%	232	3,314,378	48.9%	0.5	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
APEXFOODS	311.5	+19.6%	169.3	21.9x	1.3x	SQURPHARMA	107,730	7.5%	7.5x	1.3x	PTL	82.3	+3.1%	311.3	13.0x	1.7x
SHYAMPSUG	319.6	+8.6%	21.5	NM	NM	BRACBANK	80,111	5.6%	6.6x	1.3x	SAIHAMTEX	43.1	-2.3%	209.8	69.5x	1.0x
ZEALBANGLA	183.7	+7.9%	5.2	NM	NM	BXPHARMA	44,511	3.1%	7.4x	1.1x	APEXFOODS	311.5	+19.6%	169.3	21.9x	1.3x
ICBSONALI1	8.1	+6.6%	51.6	NM	0.9x	ISLAMIBANK	41,784	2.9%	NM	0.7x	ACMEPL	25.8	+1.2%	166.3	NM	1.6x
INTRACO	23.4	+5.9%	28.6	NM	1.8x	PUBALIBANK	41,283	2.9%	5.1x	0.8x	IPDC	31.3	-3.7%	146.4	26.3x	1.8x
BDLAMPS	262.4	+5.81%	78.6	NM	5.6x	CITYBANK	36,178	2.5%	3.4x	0.8x	TECHNODRUG	36.7	-9.8%	146.4	24.5x	1.2x
SUNLIFEINS	59.7	+5.3%	57.1	NM	NM	WALTONHIL	35,149	2.4%	10.8x	1.0x	MALEKSPIN	48.1	-4.4%	124.8	8.5x	0.7x
USMANIAGL	53.4	+4.1%	1.3	NM	0.9x	GP	32,434	2.3%	9.2x	5.8x	ETL	15.0	-3.2%	111.1	23.4x	1.2x
HWAWELLTEX	48.1	+3.7%	35.0	14.4x	1.2x	BATBC	31,565	2.2%	20.5x	2.1x	ENVOYTEX	71.5	-1.7%	96.5	8.7x	1.2x
PTL	82.3	+3.1%	311.3	13.0x	1.7x	EBL	26,443	1.8%	4.2x	0.7x	ORIONINFU	231.2	-5.2%	94.2	NM	14.3x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	24,755	1.7%	18.6x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
TECHNODRUG	36.7	-9.8%	146.4	24.5x	1.2x	LHB	22,637	1.6%	12.3x	3.3x	PRIMEBANK	28.2	28.2	1.0	1,516	42.74
MAKSONSPIN	4.9	-9.3%	3.4	NM	2x	PRIMEBANK	22,152	1.5%	3.7x	0.7x	PTL	87.6	73.0	5.0	223	16.90
NURANI	2.8	-6.3%	0.1	NM	1.0x	OLYMPIC	17,829	1.2%	15.0x	2.1x	SQURPHARMA	217.3	217.2	2.0	77	16.64
ZAHINTEX	7.4	-6.3%	0.1	NM	1.0x	UCB	17,784	1.2%	3.8x	0.5x	BRACBANK	65.0	64.7	3.0	219	14.21
GSPFINANCE	3.2	-5.9%	0.3	NM	NM	UTTARABANK	17,324	1.2%	NM	0.7x	CITYGENINS	132.8	121.0	3.0	84	10.99
FEKDIL	20.2	-5.6%	47.1	NM	1.1x	ROBI	15,714	1.1%	15.0x	2.4x	SUNLIFEINS	57.0	57.0	3.0	185	10.55
BDTHAIFOOD	17.8	-5.3%	16.3	NM	1.5x	BSRMLTD	14,794	1.0%	4.3x	0.5x	IPDC	35.4	35.0	2.0	175	6.14
AMANFEED	28.6	-5.3%	20.4	NM	1.0x	BEACONPHAR	13,990	1.0%	16.0x	3.0x	PRIMEINSUR	53.2	44.0	2.0	132	6.03
PREMIERLEA	1.8	-5.3%	0.6	NM	NM	JAMUNABANK	13,556	0.9%	3.5x	0.7x	IFIC	4.9	4.9	1.0	1,000	4.90
ORIONINFU	231.2	-5.2%	94.2	NM	14.3x						SPCL	51.2	51.2	1.0	76	3.89
* 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	28.2	28.2	42.7	1,516	1
PTL	87.6	73.0	16.9	223	5
SQURPHARMA	217.3	217.2	16.6	77	2
BRACBANK	65.0	64.7	14.2	219	3
CITYGENINS	132.8	121.0	11.0	84	3
SUNLIFEINS	57.0	57.0	10.5	185	3
IPDC	35.4	35.0	6.1	175	2
PRIMEINSUR	53.2	44.0	6.0	132	2
IFIC	4.9	4.9	4.9	1,000	1
SPCL	51.2	51.2	3.9	76	1
ICICL	37.2	37.2	3.4	92	1
BDAUTOCA	198.0	198.0	2.9	15	1
AGNISYSL	28.4	28.4	2.6	93	1
STANDARINS	54.4	54.4	2.0	36	1
UNITEDFIN	18.0	18.0	1.7	96	3
PRAGATIINS	75.0	75.0	1.6	22	1
MATINSPINN	70.0	69.0	1.5	22	2
MEGHNAINS	35.7	35.7	1.3	35	1
ASIATICLAB	100.2	96.6	1.2	12	2
ONEBANKPLC	7.0	7.0	1.0	142	1
BDLAMPS	235.0	235.0	0.9	4	1
ACFL	22.6	22.6	0.9	40	1
Total			157.3		44

Important DSE News

PRIMEBANK

Uniglory Cycle Industries Limited, a Corporate Director of the Company, has expressed its intention to buy 15,15,660 shares of the Company at the prevailing market price in the Block Market through Dhaka Stock Exchange PLC. within October 29, 2026.

APEXFOODS

The Board of Directors has recommended 20% Cash Dividend (Tk. 2 per share of Tk. 10 each) for the year ended June 30, 2026. Date of AGM: 26.11.2026, Time: 11:30 AM, Venue: Digital Platform. Record Date: 27.10.2026. The Company has also reported EPS of Tk. 14.21, NAV per share of Tk. 241.97 and NOCFPS of Tk. 64.89 for the year ended June 30, 2026 as against Tk. 6.41, Tk. 118.99 (Restated) and Tk. (59.16) respectively for the year ended June 30, 2025. EPS: There was significant variance occurs between 2024-2025 and 2025-2026 performance as the EPS of 2024-2025 was Tk. 6.41 and it became Tk. 14.21 for the year 2025-2026 is mainly increase in revenue. NOCFPS: There was significant variance in net operating cash flows as compared to the last year. The Net Operating Cash Flows per Share is Tk. 64.89 but it was Tk. (59.16) in 2024-25. which is mainly for increase in collection from revenue during the year 2025-2026 as compared to last year, however the scenario is changeable time to time depending on different issues. NAV: Net Assets Value (NAV) per share is Tk. 241.97 as on 30.06.2026 but it was Tk. 118.99 as on 30.06.2025 (Restated). The main reason for increasing NAV due to increase in share price of Investments.

APEXSPINN

The Board of Directors has recommended 20% Cash Dividend for the year ended June 30, 2026. Date of AGM: 26.11.2026, Time: 10:00 AM, Venue/Mode: Digital Platform. Record Date: 27.10.2026. The Company has also reported EPS of Tk. 3.38, NAV per share of Tk. 78.81 and NOCFPS of Tk. 20.43 for the year ended June 30, 2026 as against Tk. 3.17 (restated), Tk. 75.84 (restated) and Tk. 22.15 respectively for the year ended June 30, 2025. Reasons for deviation: There was significant variance in Basic Earnings per share of last year 2024-2025 due to calculation of deferred tax on service benefit obligation under tax expenses by Tk. 3,599,638.00. Upon such adjustment/restatements, NAV per share has been restated for the years 2024-2025 also according to the accounting standard.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
IBNSINA		0.0%	77.0%	Record Date	26-Oct-26
APEXSPINN		0.0%	20.0%	Record Date	27-Oct-26
APEXFOODS		0.0%	20.0%	Record Date	27-Oct-26

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