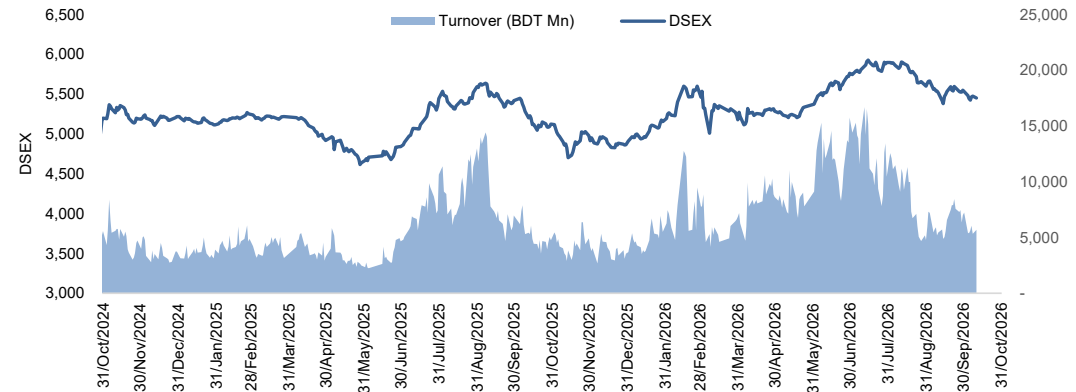


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.45%) lost 24.54 points and closed at 5,451.04. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (-0.61%), and the large-cap index CDSET (-0.03%) closed at 2,103.46, 1,080.31, and 1,108.12 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.76% followed by Engineering (-0.64%), Food & Allied (-0.25%), Telecommunication (-0.17%), Pharmaceutical (-0.16%), Bank (-0.05%), and Fuel & Power (+0.83%), respectively. Block trades contributed 5.9% of the overall market turnover. Bangladesh Export Import Company Ltd. (+5.3%) was the most traded share with a turnover of BDT 281 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,451.04	5,475.58	-24.54	-0.45%	+12.0%
DS30	2,103.46	2,105.68	-2.22	-0.11%	+13.5%
DSES	1,080.31	1,086.97	-6.67	-0.61%	+8.0%
CDSET	1,108.12	1,108.48	-0.36	-0.03%	+10.3%

	Advanced	Declined	Unchanged	Total
All Category	79	264	42	385
A Category (Equity)	39	137	17	193
B Category (Equity)	8	64	2	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	32	63	23	118
Mutual Funds	0	26	5	31
Corporate Bonds	2	0	0	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,842,667	6,842,062	+0.0%
	Mn USD	55,530	55,525	
Turnover	Mn BDT	5,686	5,332	+6.6%
	Mn USD	46	43	
Volume	Mn Shares	189	175	+8.2%
No. of Trade		184,191	172,590	+6.7%

* Average Interbank Exchange Rate is BDT 123.23 as of Oct 11, 2026

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Figure: Sectorial Turnover (BDT Mn)

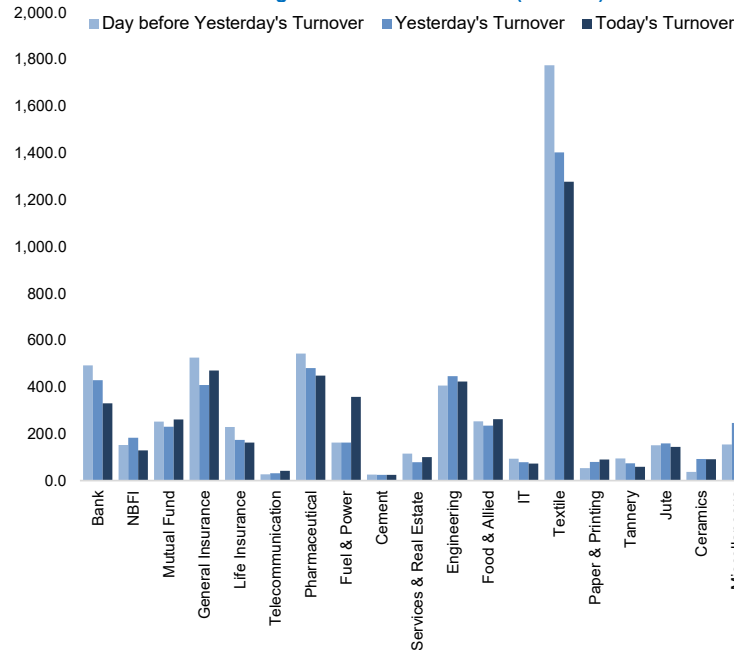
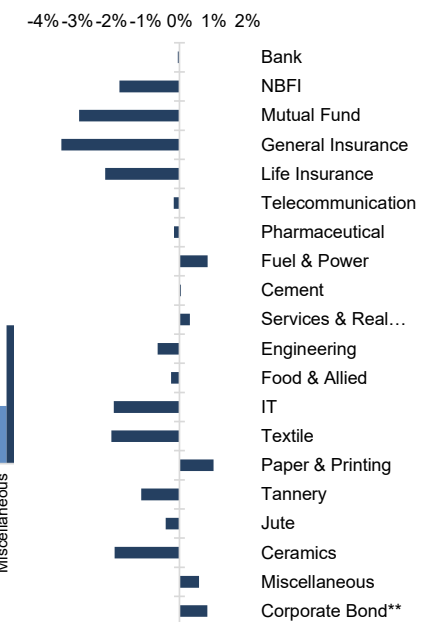


Figure: Sectorial Mcap Change



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	1,545	1,546	-0.81	-0.05%	36	736,468	10.8%	330.1	6.2%	7.2x	0.7x	GP	326,368	9.5%	7.1	9.3x	5.8x
NBFI	1,037	1,055	-18.56	-1.76%	23	98,576	1.4%	129.0	2.4%	NM	1.1x	SQURPHARMA	193,690	5.6%	26.8	7.5x	1.3x
Mutual Fund	615	634	-18.67	-2.95%	34	28,632	0.4%	261.6	4.9%	NM	0.5x	ROBI	156,090	4.5%	22.6	14.9x	2.4x
General Insurance	4,163	4,313	-149.73	-3.47%	43	117,623	1.7%	470.7	8.8%	17.1x	1.6x	BRACBANK	151,340	4.4%	66.8	6.7x	1.3x
Life Insurance	1,664	1,701	-37.18	-2.19%	15	46,907	0.7%	162.1	3.0%	NM	NM	WALTONHIL	121,289	3.5%	6.0	10.8x	1.0x
Telecommunication	4,403	4,410	-7.36	-0.17%	3	510,869	7.5%	41.3	0.8%	10.6x	3.6x	BATBC	120,258	3.5%	7.5	20.7x	2.1x
Pharmaceutical	3,047	3,052	-4.85	-0.16%	34	575,177	8.4%	448.3	8.4%	10.5x	1.5x	MARICO	83,481	2.4%	5.0	7.4x	18.1x
Fuel & Power	1,103	1,094	+9.04	+0.83%	23	291,050	4.3%	358.3	6.7%	9.3x	0.6x	BERGERPBL	71,322	2.1%	2.1	15.3x	3.3x
Cement	1,944	1,943	+0.85	+0.04%	7	91,478	1.3%	24.2	0.5%	21.2x	2.1x	UPGDCL	66,375	1.9%	2.4	7.1x	1.4x
Services & Real Estate	1,091	1,088	+3.31	+0.30%	9	59,377	0.9%	100.1	1.9%	26.5x	0.4x	BXPHARMA	63,883	1.9%	32.7	7.4x	1.1x
Engineering	2,502	2,518	-16.17	-0.64%	42	280,462	4.1%	423.7	7.9%	14.8x	0.8x	LHB	60,624	1.8%	7.5	12.3x	3.3x
Food & Allied	12,084	12,114	-30.03	-0.25%	21	220,592	3.2%	262.7	4.9%	31.4x	3.2x	CITYBANK	52,307	1.5%	24.8	3.4x	0.8x
IT	2,210	2,254	-43.56	-1.93%	11	29,267	0.4%	72.4	1.4%	47.7x	1.8x	RENATA	51,613	1.5%	16.4	18.9x	1.4x
Textile	1,343	1,370	-27.46	-2.00%	58	139,664	2.0%	1,277.3	23.9%	NM	0.9x	DUTCHBANGL	46,083	1.3%	4.5	3.5x	0.7x
Paper & Printing	4,476	4,431	+44.55	+1.01%	6	20,963	0.3%	90.6	1.7%	NM	1.4x	ISLAMIBANK	40,894	1.2%	0.9	NM	0.7x
Tannery	2,015	2,038	-22.84	-1.12%	6	23,397	0.3%	58.7	1.1%	NM	1.4x	UNILEVERCL	38,406	1.1%	0.2	62.7x	23.5x
Jute	14,649	14,708	-58.91	-0.40%	3	3,195	0.0%	144.1	2.7%	NM	2.0x	EBL	37,476	1.1%	13.5	4.2x	0.7x
Ceramics	417	426	-8.10	-1.90%	5	18,863	0.3%	91.1	1.7%	NM	1.2x	POWERGRID	36,278	1.1%	7.6	9.0x	0.3x
Miscellaneous	2,470	2,456	+14.05	+0.57%	15	134,114	2.0%	591.0	11.0%	37.9x	1.0x	PRIMEBANK	34,609	1.0%	5.5	3.7x	0.7x
Corporate Bond**	18,446	18,296	+149.60	+0.82%	16	40,809	0.6%	6.0	0.1%	NM	NM	ICB	34,343	1.0%	2.3	NM	1.3x
Treasury Bond**	2,200	2,192	+8.62	+0.39%	232	3,379,734	49.4%	7.7	0.1%	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
AZIZPIPES	94.9	+10.0%	12.0	NM	NM	SQURPHARMA	108,176	7.5%	7.5x	1.3x	BEXIMCO	23.7	+5.3%	281.3	NM	0.3x
ANLIMAYARN	28.1	+9.8%	2.3	NM	9.9x	BRACBANK	81,466	5.7%	6.7x	1.3x	QGBALLPEN	609.3	+6.7%	240.6	NM	4.2x
BPPL	19.2	+9.7%	35.1	5.5x	0.6x	BXPHARMA	44,635	3.1%	7.4x	1.1x	ETL	15.0	-6.3%	184.9	23.4x	1.2x
SALAMCRST	12.5	+9.6%	3.0	65.8x	0.7x	PUBALIBANK	43,305	3.0%	5.3x	0.8x	SAIHAMTEX	45.4	+0.2%	181.5	73.2x	1.0x
NBL	3.6	+9.1%	3.0	NM	NM	ISLAMIBANK	40,820	2.8%	NM	0.7x	SONALIANSH	243.2	-0.7%	143.7	67.4x	1.0x
ABBANK	4.4	+7.32%	5.6	NM	NM	CITYBANK	36,422	2.5%	3.4x	0.8x	SHARPIND	15.0	-8.0%	133.5	NM	1.9x
ALLTEX	27.1	+7.1%	26.6	NM	1x	WALTONHIL	35,065	2.4%	10.8x	1.0x	DOMINAGE	64.1	-1.5%	107.0	NM	3.8x
BIFC	3.2	+6.7%	0.7	NM	NM	GP	32,637	2.3%	9.3x	5.8x	PTL	72.8	-6.8%	105.5	11.5x	1.5x
QGBALLPEN	609.3	+6.7%	240.6	NM	4.2x	BATBC	31,808	2.2%	20.7x	2.1x	IPDC	30.0	-2.3%	91.7	25.2x	1.8x
ATLASBANG	82.6	+5.9%	0.6	NM	0.7x	EBL	26,443	1.8%	4.2x	0.7x	SIMTEX	24.7	-0.8%	91.6	19.8x	1.1x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,141	1.7%	18.9x	1.4x	Block Trade					
MBL1STMF	8.1	-10.0%	26.4	NM	0.9x	LHB	22,637	1.6%	12.3x	3.3x	QGBALLPEN	605.0	570.0	27.0	170	99.34
PF1STMF	12.3	-9.6%	47.1	NM	1x	PRIMEBANK	22,309	1.5%	3.7x	0.7x	SIPLC	154.4	142.0	5.0	461	66.06
EXIM1STMF	4.9	-8.9%	36.6	NM	2.5x	OLYMPIC	17,653	1.2%	14.1x	2.0x	APEXSPINN	380.0	370.0	7.0	102	38.56
1STPRIMFMF	24.6	-8.9%	36.6	NM	2.5x	UTTARABANK	17,324	1.2%	NM	0.7x	ASIATICLAB	110.0	101.5	3.0	210	22.46
SUNLIFEINS	51.0	-8.6%	60.4	NM	NM	UCB	16,750	1.2%	3.8x	0.5x	PUBALIBANK	40.5	40.5	2.0	500	20.25
NCCBLMF1	5.5	-8.3%	1.0	NM	0.6x	BSRMLTD	15,663	1.1%	4.6x	0.6x	FINEFOODS	461.4	461.4	1.0	23	10.61
SIPLC	129.2	-8.0%	40.7	25.4x	4.2x	ROBI	15,609	1.1%	14.9x	2.4x	BDLAMP	250.0	250.0	5.0	38	9.43
SHARPIND	15.0	-8.0%	133.5	NM	1.9x	BEXIMCO	14,953	1.0%	NM	0.3x	IPDC	33.7	31.5	3.0	253	8.45
PRIMEINSUR	40.4	-8.0%	7.3	18.3x	1.9x	BEACONPHAR	14,170	1.0%	16.2x	3.0x	TAKAFULINS	45.5	45.5	1.0	120	5.46
PRIME1CBA	6.0	-7.7%	7.5	NM	0.7x						PROVATIINS	50.9	50.9	1.0	105	5.35

* 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
GQBALLPEN	605.0	570.0	99.3	170	27
SIPLC	154.4	142.0	66.1	461	5
APEXSPINN	380.0	370.0	38.6	102	7
ASIATICLAB	110.0	101.5	22.5	210	3
PUBALIBANK	40.5	40.5	20.3	500	2
FINEFOODS	461.4	461.4	10.6	23	1
BDLAMPS	250.0	250.0	9.4	38	5
IPDC	33.7	31.5	8.5	253	3
TAKAFULINS	45.5	45.5	5.5	120	1
PROVATIINS	50.9	50.9	5.3	105	1
KARNAPHULI	54.0	53.8	4.6	84	2
SONALIANS	246.0	242.0	3.9	16	3
ENVOYTEX	73.1	73.1	3.7	50	1
PRAGATIINS	76.0	76.0	3.6	48	1
PTL	85.9	78.0	3.5	43	4
GLOBALINS	45.0	45.0	3.2	71	1
UNITEDFIN	17.5	17.3	2.5	145	4
LOVELLO	53.7	53.7	2.4	45	1
BRACBANK	64.5	64.5	2.0	31	1
ALLTEX	24.6	24.2	1.9	77	3
ETL	16.0	16.0	1.7	109	2
MONOSPOOL	116.0	116.0	1.5	13	1
Total			335.2		94

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
EHL		0.0%	20.0%	Record Date	29-Oct-26
OLYMPIC		0.0%	35.0%	Record Date	4-Nov-26
GQBALLPEN		0.0%	12.5%	Record Date	4-Nov-26
SIMTEX		0.0%	9.7%	Record Date	5-Nov-26
FINEFOODS		0.0%	35.6%	Record Date	12-Nov-26
DOREENPWR		0.0%	15.0%	Record Date	12-Nov-26

Important DSE News

DOREENPWR

The Board of Directors has recommended 15.00% Cash dividend for all Shareholders excluding the Sponsors & Directors for the year ended June 30, 2026. The quantities of securities held by the said sponsors and/or directors who will not be entitled to recommended dividend: 120.64 million shares. The amount of cash dividend payable to the general shareholders is Tk. 90.72 million. Date of AGM: 24.12.2026, Time: 11:00 AM, Venue: Digital Platform (Link will be provided later). Record Date: 12.11.2026. The Company has also reported consolidated EPS of Tk. 5.03, consolidated NAV per share of Tk. 57.12 and consolidated NOCFPS of Tk. 18.96 for the year ended June 30, 2026 as against EPS of Tk. 3.19, NAV per share of Tk. 52.43 and NOCFPS of Tk. 11.78 for the year ended June 30, 2025.

□

SIMTEX

The Board of Directors has recommended 11% Cash Dividend for General Shareholders and 7% Cash Dividend for Sponsors and Directors for the year ended June 30, 2026. Date of AGM: 17.12.2026, Time: 11:00 AM, Venue: Hybrid Platform (Factory Premises: Khagan, Birulia, Savar, Dhaka-1341). Record Date: 05.11.2026. The Company has also reported EPS of Tk. 1.25, NAV per share of Tk. 22.72 and NOCFPS of Tk. 2.90 for the year ended June 30, 2026 as against EPS of Tk. 1.03, NAV per share of Tk. 22.43 and NOCFPS of Tk. 3.31 for the year ended June 30, 2025.

OLYMPIC

The Board of Directors has recommended 35% Cash Dividend for the year ended June 30, 2026. Date of AGM: 30.11.2026, Time: 11:00 AM, Venue/Mode: Digital Platform. Record Date: 04.11.2026. The Company has also reported Basic and Diluted EPS of Tk. 10.00, NAV per share of Tk. 69.35 and NOCFPS of Tk. 11.79 for the year ended June 30, 2026 as against Tk. 10.06, Tk. 62.35 and Tk. 11.45 respectively for the year ended June 30, 2025. □

The company has informed that the Board of Directors has taken decision to purchase the following lands for undertaking construction to accommodate future expansion of operation: a) To purchase total 68.50 decimals land under Mouza: Madanpur, Police Station: Bondar and District: Narayanganj in the name of Olympic Industries PLC. at an agreed total price of Tk. 1,64,40,000.00 (Taka one crore sixty-four lac forty thousand) from Mr. Anower Hossain and Mr. Ibrahim Prodhanson of Late Mr. Md. Abdul Aziz and Mst. Asma Begum, Sonapur, Kanchpur, Sonargoan, Narayanganj. b) To purchase total 69.58 decimals land under Mouza: Madanpur, Police Station: Bondar District: Narayanganj in the name of Olympic Industries PLC. at an agreed total price of Tk. 1,73,75,000.00 (Taka one crore seventy-three lac seventy-five thousand) from Mr. Salim Ahmmed Gong, Madanpur, Bandar, Narayanganj.

GQBALLPEN

The Board of Directors has recommended 12.50% Cash Dividend for the year ended June 30, 2026. Date of AGM: 30.11.2026, Time: 11:00 AM, Venue/Mode: Hybrid Platform. Record Date: 04.11.2026. The Company has also reported EPS of Tk. 0.12, NAV per share of Tk. 143.60 and NOCFPS of Tk. 0.58 for the year ended June 30, 2026 as against Tk. (1.83), Tk. 135.81 and Tk. (0.31) respectively for the year ended June 30, 2025.

TAKAFULINS

(Q3 Un-audited): EPS was Tk. 0.50 for July-September, 2026 as against Tk. 0.39 for July-September, 2025; EPS was Tk. 1.88 for January-September, 2026 as against Tk. 1.13 for January-September, 2025. NOCFPS was Tk. 1.05 for January-September, 2026 as against Tk. 1.74 for January-September, 2025. NAV per share was Tk. 20.10 as on September 30, 2026 and Tk. 19.00 as on December 31, 2025.