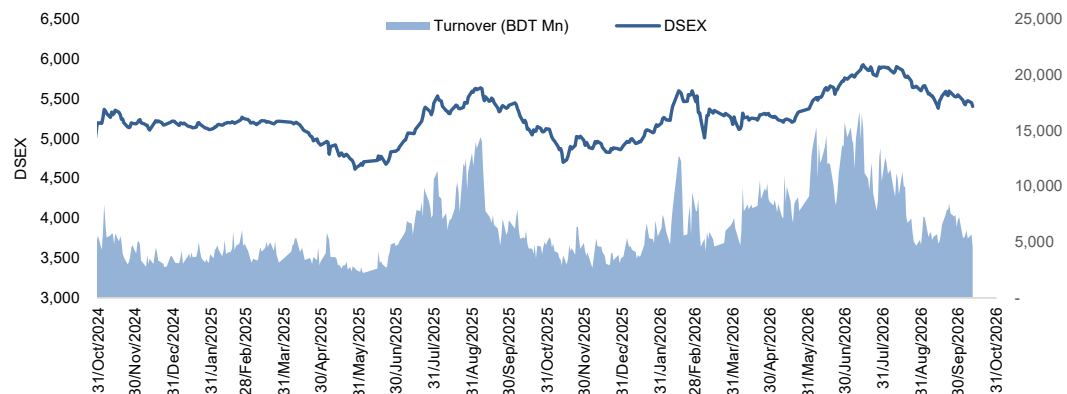


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.85%) lost 46.17 points and closed at 5,404.87. The blue-chip index DS30 (-0.42%), the Shariah-based index DSES (-0.89%), and the large-cap index CDSET (-0.54%) closed at 2,094.55, 1,070.68, and 1,102.11 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 3.63% followed by Engineering (-1.77%), Food & Allied (-1.38%), Pharmaceutical (-0.38%), Telecommunication (-0.30%), Bank (-0.27%), and Fuel & Power (-0.25%), respectively. Block trades contributed 2.3% of the overall market turnover. Evince Textiles Limited (+1.3%) was the most traded share with a turnover of BDT 171 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,404.87	5,451.04	-46.17	-0.85%	+11.1%
DS30	2,094.55	2,103.46	-8.91	-0.42%	+13.0%
DSES	1,070.68	1,080.31	-9.62	-0.89%	+7.0%
CDSET	1,102.11	1,108.12	-6.01	-0.54%	+9.7%

	Advanced	Declined	Unchanged	Total
All Category	47	303	35	385
A Category (Equity)	21	155	17	193
B Category (Equity)	7	65	2	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	19	83	16	118
Mutual Funds	0	23	8	31
Corporate Bonds	0	1	1	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,828,675	6,842,667	-0.2%
	Mn USD	55,374	55,487	
Turnover	Mn BDT	4,528	5,686	-20.4%
	Mn USD	37	46	
Volume	Mn Shares	168	189	-11.1%
No. of Trade		172,658	184,191	-6.3%

* Average Interbank Exchange Rate is BDT 123.32 as of Oct 12, 2026

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Tasviha Taher Trishila Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

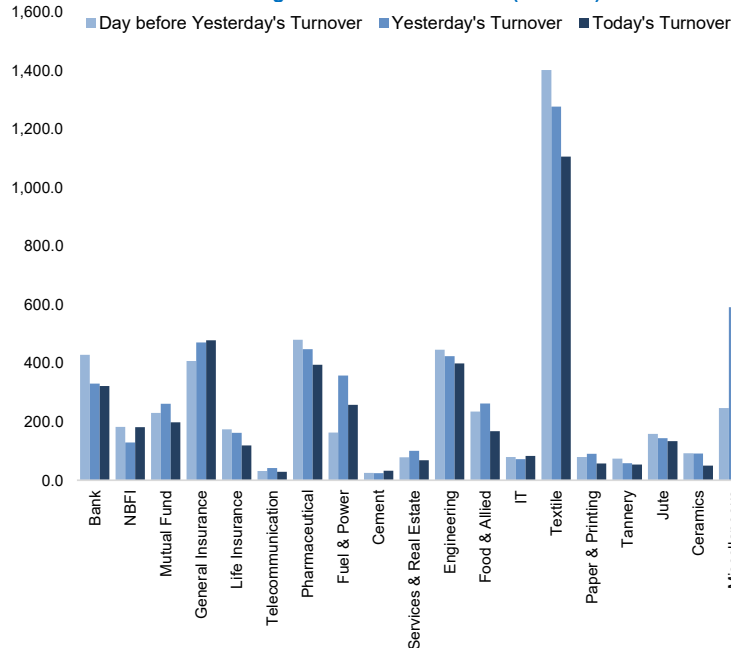
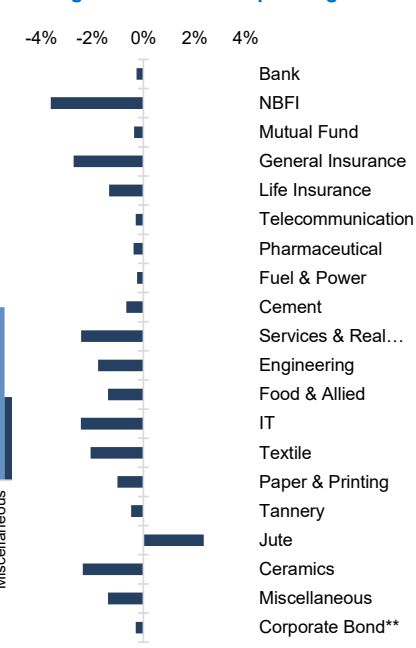


Figure: Sectorial Mcap Change



Market PE 12.8x

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	1,541	1,545	-4.24	-0.27%	36	734,445	10.7%	321.9	7.3%	7.2x	0.7x	GP	325,557	9.5%	7.5	9.2x	5.8x
NBFI	999	1,037	-37.64	-3.63%	23	94,997	1.4%	181.5	4.1%	NM	1.0x	SQURPHARMA	193,690	5.7%	24.2	7.5x	1.3x
Mutual Fund	613	615	-2.26	-0.37%	35	28,526	0.4%	198.4	4.5%	NM	0.5x	ROBI	156,090	4.6%	15.0	14.9x	2.4x
General Insurance	4,049	4,163	-113.72	-2.73%	43	114,410	1.7%	477.9	10.8%	16.7x	1.6x	BRACBANK	151,340	4.4%	92.0	6.7x	1.3x
Life Insurance	1,642	1,664	-22.31	-1.34%	15	46,278	0.7%	119.2	2.7%	NM	NM	WALTONHIL	120,263	3.5%	9.8	10.7x	0.9x
Telecommunication	4,389	4,403	-13.27	-0.30%	3	509,329	7.5%	29.0	0.7%	10.5x	3.6x	BATBC	118,530	3.5%	11.0	20.4x	2.0x
Pharmaceutical	3,035	3,047	-11.59	-0.38%	34	572,989	8.4%	395.0	8.9%	10.4x	1.4x	MARICO	83,406	2.4%	14.8	7.4x	18.1x
Fuel & Power	1,100	1,103	-2.78	-0.25%	23	290,317	4.2%	258.0	5.8%	9.3x	0.6x	BERGERPBL	71,214	2.1%	2.1	15.2x	3.3x
Cement	1,931	1,944	-13.10	-0.67%	7	90,861	1.3%	32.6	0.7%	21.1x	2.0x	UPGDCL	66,259	1.9%	3.0	7.1x	1.4x
Services & Real Estate	1,065	1,091	-26.62	-2.44%	9	57,929	0.8%	68.5	1.5%	25.8x	0.4x	BXPBARMA	64,196	1.9%	39.9	7.4x	1.1x
Engineering	2,458	2,502	-44.39	-1.77%	42	275,487	4.0%	398.9	9.0%	14.5x	0.8x	LHB	60,391	1.8%	17.9	12.3x	3.3x
Food & Allied	11,916	12,084	-167.25	-1.38%	21	217,538	3.2%	167.4	3.8%	31.0x	3.2x	CITYBANK	52,307	1.5%	29.2	3.4x	0.8x
IT	2,156	2,210	-54.23	-2.45%	11	28,549	0.4%	83.4	1.9%	48.7x	1.8x	RENATA	51,178	1.5%	3.3	18.7x	1.4x
Textile	1,315	1,343	-27.79	-2.07%	58	136,774	2.0%	1,106.2	25.0%	NM	0.9x	DUTCHBANGL	45,575	1.3%	6.9	3.5x	0.7x
Paper & Printing	4,430	4,476	-45.48	-1.02%	6	20,750	0.3%	57.5	1.3%	NM	1.4x	ISLAMIBANK	40,250	1.2%	4.2	NM	0.7x
Tannery	2,005	2,015	-9.61	-0.48%	6	23,285	0.3%	53.4	1.2%	NM	1.4x	UNILEVERCL	38,136	1.1%	0.4	62.3x	23.4x
Jute	14,995	14,649	+346.60	+2.37%	3	3,271	0.0%	133.5	3.0%	NM	2.0x	EBL	37,476	1.1%	6.7	4.2x	0.7x
Ceramics	408	417	-9.91	-2.37%	5	18,415	0.3%	50.0	1.1%	NM	1.2x	POWERGRID	36,461	1.1%	9.4	9.0x	0.3x
Miscellaneous	2,436	2,470	-34.11	-1.38%	15	132,262	1.9%	284.2	6.4%	37.4x	1.0x	PRIMEBANK	34,609	1.0%	11.3	3.7x	0.7x
Corporate Bond**	18,391	18,446	-54.92	-0.30%	16	40,688	0.6%	2.8	0.1%	NM	NM	BSRMSTEEL	32,520	1.0%	23.5	5.4x	0.9x
Treasury Bond**	2,212	2,200	+11.25	+0.51%	232	3,397,008	49.7%	2.9	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
NBL	3.9	+8.3%	7.3	NM	NM	SQURPHARMA	108,176	7.6%	7.5x	1.3x	ETL	15.2	+1.3%	171.2	23.8x	1.2x
GBBPOWER	11.8	+8.3%	5.6	NM	0.6x	BRACBANK	81,466	5.7%	6.7x	1.3x	BEXIMCO	22.2	-6.3%	154.1	NM	0.3x
PRIMETEX	14.5	+8.2%	0.2	NM	0.2x	BXPHARMA	44,853	3.1%	7.4x	1.1x	SONALIANSH	251.2	+3.3%	132.9	69.6x	1.1x
RENWICKJA	770.2	+7.5%	22.7	NM	NM	PUBALIBANK	43,198	3.0%	5.3x	0.8x	SAIHAMTEX	42.6	-6.2%	125.9	68.7x	1.0x
MLDYEING	11.1	+4.7%	76.7	NM	0.9x	ISLAMIBANK	40,177	2.8%	NM	0.7x	PTL	73.4	+0.8%	109.5	11.6x	1.5x
BDWELDING	10.9	+3.81%	1.4	NM	0.9x	CITYBANK	36,422	2.6%	3.4x	0.8x	SHARPIND	13.7	-8.7%	102.7	NM	1.7x
ANWARGALV	118.1	+3.5%	82.3	NM	22x	WALTONHIL	34,768	2.4%	10.7x	0.9x	IPDC	29.4	-2.0%	101.7	24.7x	1.7x
SONALILIFE	101.7	+3.5%	43.3	NM	NM	GP	32,556	2.3%	9.2x	5.8x	BRACBANK	66.1	-	92.0	6.7x	1.3x
SONALIANSH	251.2	+3.3%	132.9	69.6x	1.1x	BATBC	31,351	2.2%	20.4x	2.0x	ANWARGALV	118.1	+3.5%	82.3	NM	22.0x
ARAMIT	185.1	+3.2%	6.6	NM	1.5x	EBL	26,443	1.9%	4.2x	0.7x	MLDYEING	11.1	+4.7%	76.7	NM	0.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	24,929	1.7%	18.7x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MBL1STMF	7.3	-9.9%	24.9	NM	0.8x	LHB	22,550	1.6%	12.3x	3.3x	GQBALLPEN	600.2	570.0	14.0	59	34.60
PF1STMF	11.1	-9.8%	15.6	NM	1x	PRIMEBANK	22,309	1.6%	3.7x	0.7x	EBL	25.0	25.0	1.0	721	18.03
CAPMIBBLMF	14.3	-8.7%	102.7	NM	1.7x	OLYMPIC	17,453	1.2%	13.9x	2.0x	BXPHARMA	155.0	155.0	1.0	40	6.20
SHARPIND	13.7	-8.7%	102.7	NM	1.7x	UTTARABANK	17,324	1.2%	NM	0.7x	NITOLINS	57.6	57.6	5.0	90	5.17
EXIM1STMF	4.5	-8.2%	23.6	NM	0.5x	UCB	16,543	1.2%	3.8x	0.5x	BSRMSTEEL	97.9	97.9	1.0	50	4.90
ICBSONALI1	6.9	-8.0%	15.4	NM	0.7x	ROBI	15,609	1.1%	14.9x	2.4x	ITC	38.0	38.0	1.0	117	4.45
ICB	36.5	-7.8%	9.1	NM	1.2x	BSRMLTD	15,237	1.1%	4.4x	0.5x	CITYBANK	27.0	27.0	1.0	150	4.05
SICL	30.6	-7.3%	8.9	NM	2.1x	BEACONPHAR	14,031	1.0%	16.0x	3.0x	ROBI	32.7	29.9	2.0	71	2.21
BDTHAIFOOD	15.4	-7.2%	11.9	NM	1.3x	BEXIMCO	14,007	1.0%	NM	0.3x	REPUBLIC	37.8	32.5	2.0	61	2.07
TECHNODRUG	30.9	-7.2%	41.8	20.6x	1.0x						FINEFOODS	460.0	460.0	1.0	4	1.84
* 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	600.2	570.0	34.6	59	14
EBL	25.0	25.0	18.0	721	1
BXPHARMA	155.0	155.0	6.2	40	1
NITOLINS	57.6	57.6	5.2	90	5
BSRMSTEEL	97.9	97.9	4.9	50	1
ITC	38.0	38.0	4.5	117	1
CITYBANK	27.0	27.0	4.1	150	1
ROBI	32.7	29.9	2.2	71	2
REPUBLIC	37.8	32.5	2.1	61	2
FINEFOODS	460.0	460.0	1.8	4	1
POPULARLIF	50.0	50.0	1.7	34	1
IPDC	33.0	33.0	1.7	50	1
UNITEDFIN	16.4	16.4	1.6	100	1
DOMINAGE	67.9	66.0	1.6	24	2
DAFODILCOM	155.0	155.0	1.6	10	1
MALEKSPIN	50.0	50.0	1.5	30	1
SONARBAINS	42.3	42.3	1.5	35	1
MATINSPINN	78.1	72.5	1.5	20	2
MERCINS	46.5	46.5	1.1	23	1
CVOPRL	175.0	175.0	0.9	5	1
TRUSTBANK	14.4	14.4	0.9	60	1
IFIC	5.5	5.5	0.8	150	1
Total			106.0		53

Important DSE News
ITC

The Board of Directors has recommended 10% Cash Dividend (i.e., Tk. 1.00 per ordinary share of Tk. 10 each) for the year ended June 30, 2026. Date of AGM: 13.12.2026, Time: 10:30 AM, Venue/Mode of AGM: Hybrid System in combination of both online (virtual/digital platform) and physical presence at SKS Convention Hall (Sena Gourab), SKS Tower, VIP Road, Mohakhali, Dhaka-1206. Record Date: 04.11.2026. The Company has also reported EPS of Tk. 3.11, NAV per share of Tk. 25.16 and NOCFPS of Tk. 3.61 for the year ended June 30, 2026 as against Tk. 3.62, Tk. 23.25 and Tk. 4.45 respectively for the year ended June 30, 2025.

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
ITC		0.0%	10.0%	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

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.