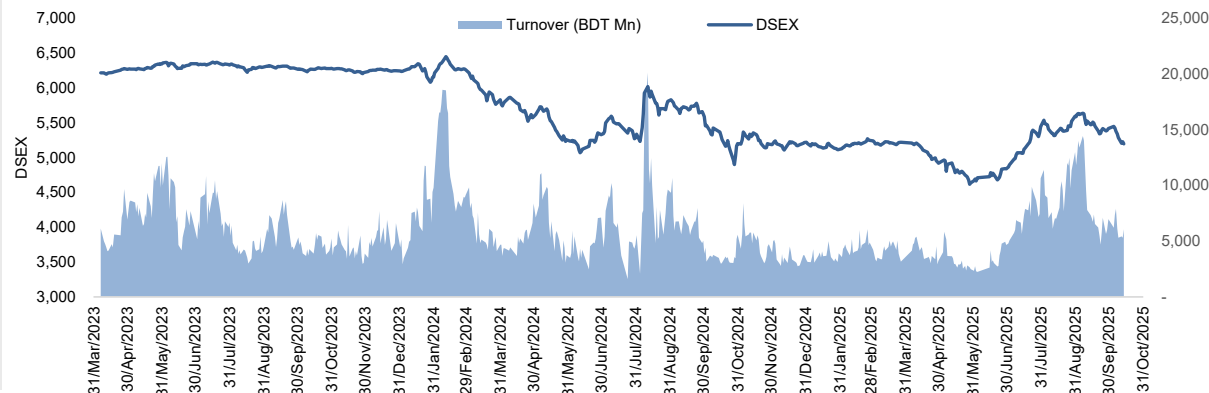


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.58%) lost 30.48 points and closed at 5,197.27. The blue-chip index DS30 (-0.71%), the Shariah-based index DSES (-0.55%), and the large-cap index CDSET (-0.63%) closed at 1,995.65, 1,111.62, and 1,054.11 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.15% followed by Food & Allied (-1.02%), Fuel & Power (-0.60%), Pharmaceutical (-0.50%), Bank (-0.20%), NBFI (-0.08%), and Telecommunication (-0.07%), respectively. Block trades contributed 3.2% of the overall market turnover. Orion Infusion Ltd. (+8.7%) was the most traded share with a turnover of BDT 303 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,197.27	5,227.75	-30.48	-0.58%	-0.4%
DS30	1,995.65	2,009.88	-14.23	-0.71%	+2.9%
DSES	1,111.62	1,117.74	-6.12	-0.55%	-4.9%
CDSET	1,054.11	1,060.78	-6.67	-0.63%	-1.1%

	Advanced	Declined	Unchanged	Total
All Category	105	233	58	396
A Category (Equity)	69	119	31	219
B Category (Equity)	8	64	9	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	28	50	18	96
Mutual Funds	18	3	15	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,056,590	7,117,058	-0.8%
	Mn USD	57,936	58,432	
Turnover	Mn BDT	6,064	5,300	+14.4%
	Mn USD	50	44	
Volume	Mn Shares	174	178	-2.2%
No. of Trade		180,455	164,448	+9.7%

* Average Interbank Exchange Rate is BDT 121.80 as of Oct 14, 2025

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Figure: Sectorial Turnover (BDT Mn)

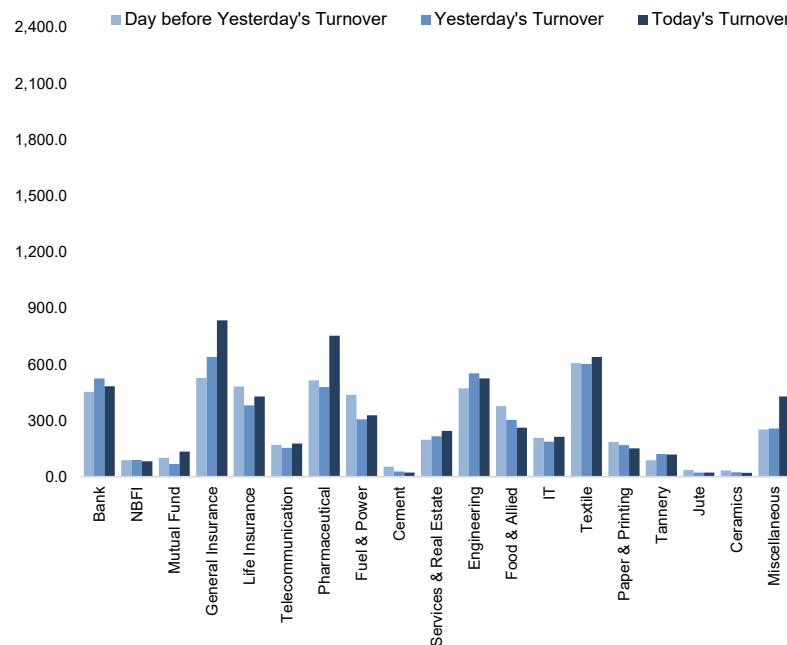
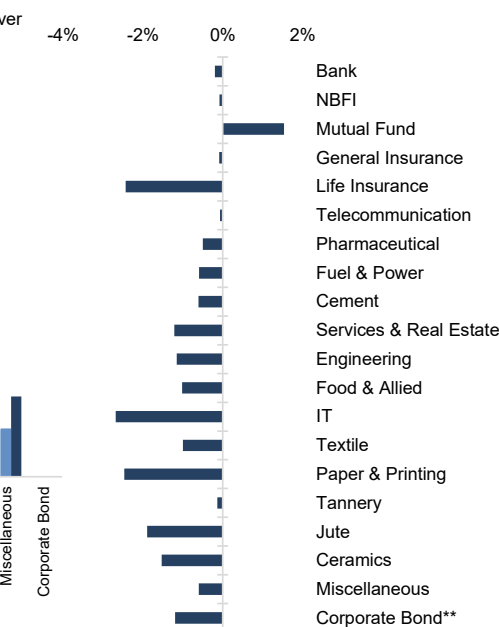


Figure: Sectorial Mcap Change



Market PE 15.6x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK, GIB and NBL

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	1,436	1,438	-2.81	-0.20%	36	679,235	9.6%	482.8	8.2%	NM	0.8x	GP	394,828	11.2%	12.5	13.4x	6.9x
NBFI	1,038	1,039	-0.85	-0.08%	23	98,898	1.4%	83.1	1.4%	NM	NM	SQURPHARMA	186,509	5.3%	166.0	7.9x	1.4x
Mutual Fund	554	546	+8.40	+1.54%	37	26,568	0.4%	134.2	2.3%	NM	0.5x	ROBI	158,186	4.5%	137.0	18.2x	2.5x
General Insurance	3,070	3,073	-2.62	-0.09%	43	87,623	1.2%	834.8	14.2%	14.7x	1.3x	BATBC	138,240	3.9%	43.0	11.1x	2.6x
Life Insurance	2,066	2,118	-51.49	-2.43%	15	54,956	0.8%	428.0	7.3%	NM	NM	BRACBANK	136,179	3.9%	60.9	9.6x	1.6x
Telecommunication	4,932	4,935	-3.43	-0.07%	3	578,282	8.2%	177.4	3.0%	14.5x	4.2x	WALTONHIL	130,289	3.7%	7.5	12.6x	1.1x
Pharmaceutical	2,968	2,983	-14.91	-0.50%	34	562,763	8.0%	753.5	12.8%	12.9x	1.6x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,123	1,130	-6.72	-0.60%	23	297,529	4.2%	328.2	5.6%	16.8x	0.6x	MARICO	87,384	2.5%	0.4	14.3x	26.2x
Cement	1,953	1,964	-11.90	-0.61%	7	93,053	1.3%	21.6	0.4%	21.4x	2.1x	UPGDCL	83,070	2.4%	4.6	7.1x	2.0x
Services & Real Estate	1,012	1,025	-12.39	-1.21%	9	55,667	0.8%	245.3	4.2%	24.6x	0.4x	BERGERPBL	69,505	2.0%	2.1	19.8x	4.0x
Engineering	2,418	2,446	-28.14	-1.15%	42	272,750	3.9%	525.3	8.9%	14.6x	0.8x	LHB	60,508	1.7%	12.9	16.1x	3.2x
Food & Allied	13,692	13,833	-140.43	-1.02%	21	250,531	3.5%	261.5	4.5%	19.0x	4.0x	RENATA	53,322	1.5%	10.9	19.0x	1.5x
IT	1,881	1,933	-51.86	-2.68%	11	24,810	0.4%	213.6	3.6%	20.9x	1.6x	BXPHARMA	50,500	1.4%	28.3	7.9x	1.0x
Textile	1,150	1,161	-11.58	-1.00%	58	119,753	1.7%	639.3	10.9%	98.8x	0.8x	UNILEVERCL	46,006	1.3%	0.1	72.4x	25.2x
Paper & Printing	5,002	5,128	-126.47	-2.47%	6	22,596	0.3%	151.6	2.6%	NM	1.1x	ICB	41,542	1.2%	3.5	NM	1.0x
Tannery	2,073	2,076	-2.82	-0.14%	6	23,101	0.3%	118.0	2.0%	NM	1.7x	DUTCHBANGL	37,701	1.1%	1.7	10.0x	0.7x
Jute	12,865	13,114	-248.22	-1.89%	3	2,832	0.0%	21.8	0.4%	NM	NM	EBL	36,544	1.0%	49.8	5.2x	0.8x
Ceramics	397	403	-6.15	-1.53%	5	17,792	0.3%	20.1	0.3%	NM	1.2x	CITYBANK	36,357	1.0%	84.6	3.3x	0.7x
Miscellaneous	4,059	4,083	-24.59	-0.60%	15	220,404	3.1%	429.0	7.3%	87.3x	1.7x	PUBALIBANK	35,920	1.0%	2.1	4.9x	0.6x
Corporate Bond**	16,942	17,146	-204.04	-1.19%	16	37,403	0.5%	3.2	0.1%	NM	NM	PRIMEBANK	31,452	0.9%	27.8	3.8x	0.8x
Treasury Bond**	2,324	2,350	-26.01	-1.11%	235	3,533,962	50.1%	0.1	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					
SIBL	4.4	+10.0%	7.9	NM	0.3x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	ORIONINFU	511.1	+8.7%	303.1	NM	32.5x					
ICBIBANK	2.3	+9.5%	0.9	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.9x	KBPPWBIL	122.9	-5.9%	268.5	NM	10.3x					
PURABIGEN	23.1	+9.0%	28.2	8.5x	1.6x	BEXIMCO	69,463	4.9%	NM	1.3x	DOMINAGE	22.0	-0.9%	255.7	NM	1.3x					
ORIONINFU	511.1	+8.7%	303.1	NM	32.5x	BATBC	50,233	3.6%	11.1x	2.6x	SAPORTL	44.6	-0.9%	186.4	16.6x	1.3x					
EXIMBANK	3.8	+8.6%	1.3	NM	0.2x	WALTONHIL	46,773	3.3%	12.6x	1.1x	CVOPRL	200.3	+1.7%	178.6	52.4x	15.3x					
PREMIERLEA	1.3	+8.33%	0.3	NM	NM	BRACBANK	46,489	3.3%	9.6x	1.6x	SQURPHARMA	210.4	-0.9%	166.0	7.9x	1.4x					
VAMLBDMF1	7.9	+8.2%	8.4	NM	1x	GP	44,708	3.2%	13.4x	6.9x	PRAGATIINS	80.9	-6.0%	161.0	14.6x	1.5x					
SEMLLECMF	8.0	+8.1%	33.0	NM	0.9x	RENATA	32,968	2.3%	19.0x	1.5x	RUPALILIFE	113.9	-0.1%	145.1	NM	NM					
FIRSTSBANK	2.8	+7.7%	1.7	NM	1.2x	BXPHARMA	23,409	1.7%	7.9x	1.0x	ROBI	30.2	+1.0%	137.0	18.2x	2.5x					
NBL	3.5	+6.1%	3.3	NM	NM	PUBALIBANK	22,905	1.6%	4.9x	0.6x	PRAGATILIF	265.5	-4.3%	136.4	NM	NM					
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.3x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
ISNLTD	85.4	-8.9%	37.8	NM	31.1x	LHB	20,953	1.5%	16.1x	3.2x	BRACBANK	69.0	69.0	1.0	1,000	69.00					
FASFIN	1.2	-7.7%	0.5	NM	NM	OLYMPIC	20,496	1.5%	16.4x	2.5x	ENVOYTEX	57.5	51.0	3.0	717	41.02					
ILFSL	1.2	-7.7%	0.6	NM	NM	ALARABANK	18,282	1.3%	35.6x	0.8x	FINEFOODS	310.0	310.0	1.0	69	21.39					
INTECH	29.0	-7.1%	35.5	NM	NM	BEACONPHAR	17,838	1.3%	29.8x	4.0x	PRAGATILIF	255.0	255.0	1.0	38	9.69					
PRAGATIINS	80.9	-6.0%	161.0	14.6x	1.5x	PRIMEBANK	16,142	1.1%	3.8x	0.8x	SUNLIFEINS	56.0	56.0	1.0	120	6.72					
SONALILIFE	67.5	-6.0%	4.8	NM	NM	ROBI	14,876	1.1%	18.2x	2.5x	PTL	61.9	58.6	4.0	110	6.59					
KBPPWBIL	122.9	-5.9%	268.5	NM	10.3x	UTTARABANK	13,699	1.0%	NM	0.8x	ORIONINFU	480.1	475.0	2.0	13	6.23					
EGEN	22.3	-5.5%	34.8	27.9x	1.0x	NBL	13,055	0.9%	NM	NM	CITYGENINS	65.5	65.5	1.0	80	5.24					
MEGCONMILK	15.2	-5.0%	0.3	NM	NM	BSRMLTD	12,852	0.9%	5.0x	0.5x	SOUTHEASTB	9.3	9.3	2.0	301	2.80					
DSHGARME	112.1	-4.9%	7.8	NM	6.1x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only. ** 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										SAIHAMTEX	15.3	15.3	1.0	150	2.22

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

** 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
BRACBANK	69.0	69.0	69.0	1,000	1
ENVOYTEX	57.5	51.0	41.0	717	3
FINEFOODS	310.0	310.0	21.4	69	1
PRAGATILIF	255.0	255.0	9.7	38	1
SUNLIFEINS	56.0	56.0	6.7	120	1
PTL	61.9	58.6	6.6	110	4
ORIONINFU	480.1	475.0	6.2	13	2
CITYGENINS	65.5	65.5	5.2	80	1
SOUTHEASTB	9.3	9.3	2.8	301	2
SAIHAMTEX	15.3	15.3	2.3	150	1
SAPORTL	41.0	41.0	2.0	48	1
UTTARABANK	21.2	21.2	1.7	80	1
AAMRANET	22.5	22.5	1.5	68	1
ETL	10.2	10.2	1.4	140	1
ITC	44.0	44.0	1.2	28	1
OLYMPIC	164.0	164.0	1.1	7	1
DSSL	10.8	10.8	1.1	106	1
BEACONPHAR	122.5	104.0	1.1	10	2
JAMUNABANK	21.4	21.4	1.1	50	1
LOVELLO	88.2	88.2	1.1	12	2
CVOPRL	204.0	204.0	1.0	5	1
AL-HAJTEX	139.0	139.0	1.0	7	1
Total			191.8		39

Important DSE News

ROBI

The company has informed that SmartPay Limited, a fully owned subsidiary of Robi Axiata PLC., is a private company limited by shares incorporated under the Bangladesh Companies Act, 1994. The principal activity of SmartPay is to provide fintech-driven electronic payment services such as bill payments and other related services. Bangladesh Bank has issued a No Objection Certificate (NOC) in favour of SmartPay Limited to operate as a Payment Service Provider (PSP).

PURABIGEN

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., 14.10.2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2024.

JANATAINS

The Company will be placed in 'A' category from existing 'Z' category with effect from October 15, 2025 as the Company has reported disbursement of 6% Cash and 4% Stock Dividend for the year ended December 31, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
APEXFOOT		25.0%	25.0%	Record Date	20-Oct-25
BANGAS		0.0%	3.0%	Record Date	21-Oct-25
TALLUSPIN		0.0%	0.0%	Record Date	21-Oct-25
BSCPLC		0.0%	40.0%	Record Date	22-Oct-25
MONNOCERA		0.0%	2.0%	Record Date	23-Oct-25
DULAMIAACOT		0.0%	3.0%	Record Date	23-Oct-25
ENVOYTEX		0.0%	30.0%	Record Date	26-Oct-25
IBNSINA		0.0%	64.0%	Record Date	26-Oct-25
MITHUNKNIT		0.0%	0.0%	Record Date	29-Oct-25
CVOPRL		9.0%	11.0%	Record Date	30-Oct-25
APEXFOODS		0.0%	20.0%	Record Date	30-Oct-25
APEXSPINN		0.0%	20.0%	Record Date	30-Oct-25
BDLAMPS		0.0%	10.0%	Record Date	3-Nov-25
LOVELLO		5.0%	11.0%	Record Date	6-Nov-25
DESCO		0.0%	0.0%	Record Date	20-Nov-25

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