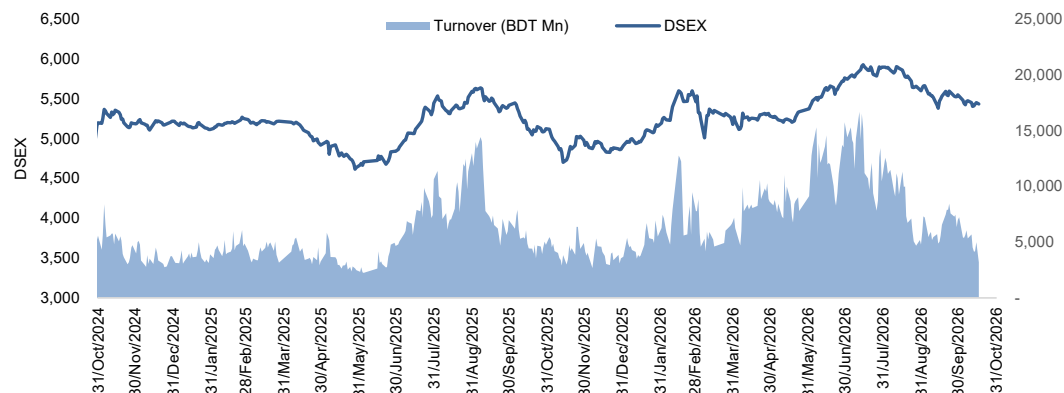


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.35%) lost 18.88 points and closed at 5,433.18. The blue-chip index DS30 (-0.29%), the Shariah-based index DSES (-0.52%), and the large-cap index CDSET (-0.28%) closed at 2,090.51, 1,072.38, and 1,100.96 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 0.72% followed by Engineering (-0.52%), Pharmaceutical (-0.41%), Food & Allied (-0.40%), Bank (-0.29%), Fuel & Power (-0.10%), and Telecommunication (+0.10%), respectively. Block trades contributed 4.7% of the overall market turnover. Evince Textiles Limited (-5.7%) was the most traded share with a turnover of BDT 99 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,433.18	5,452.06	-18.88	-0.35%	+11.7%
DS30	2,090.51	2,096.51	-6.00	-0.29%	+12.8%
DSES	1,072.38	1,077.96	-5.58	-0.52%	+7.2%
CDSET	1,100.96	1,104.01	-3.05	-0.28%	+9.6%

	Advanced	Declined	Unchanged	Total
All Category	96	229	61	386
A Category (Equity)	52	120	22	194
B Category (Equity)	13	57	3	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	31	52	36	119
Mutual Funds	4	16	11	31
Corporate Bonds	1	0	0	1
Treasury Bonds	1	3	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,831,415	6,841,079	-0.1%
	Mn USD	55,319	55,397	
Turnover	Mn BDT	3,174	4,997	-36.5%
	Mn USD	26	40	
Volume	Mn Shares	113	162	-30.1%
No. of Trade		120,644	162,437	-25.7%

* Average Interbank Exchange Rate is BDT 123.49 as of Oct 17, 2026

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Figure: Sectorial Turnover (BDT Mn)

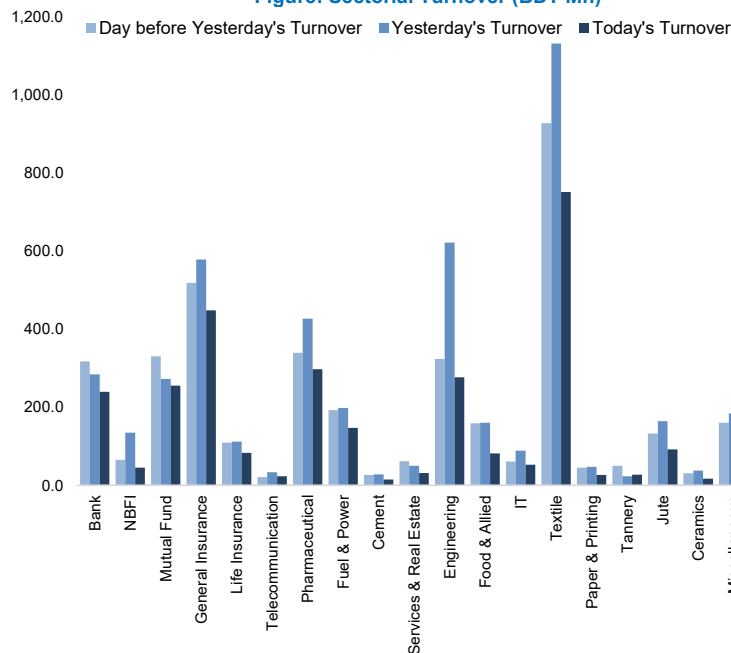
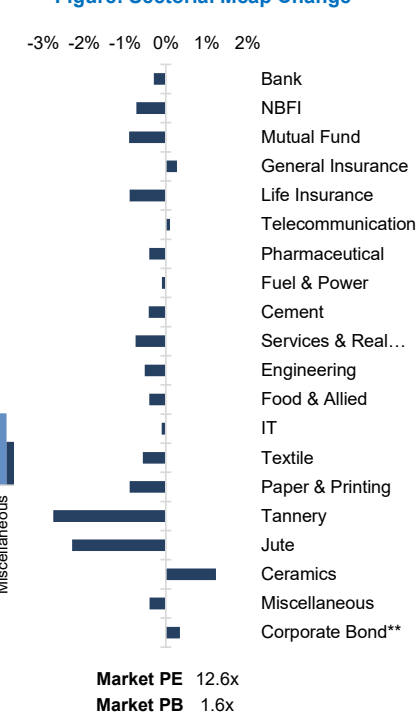


Figure: Sectorial Mcap Change



* 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	1,540	1,544	-4.55	-0.29%	36	733,806	10.7%	239.1	7.9%	7.2x	0.7x	GP	321,506	9.4%	6.6	9.1x	5.7x
NBFI	1,016	1,023	-7.37	-0.72%	23	96,579	1.4%	44.8	1.5%	NM	1.0x	SQURPHARMA	194,842	5.7%	42.0	7.5x	1.3x
Mutual Fund	651	657	-5.92	-0.90%	35	29,450	0.4%	255.3	8.4%	NM	0.6x	ROBI	155,567	4.5%	8.4	14.9x	2.4x
General Insurance	4,268	4,256	+11.63	+0.27%	43	120,588	1.8%	448.5	14.8%	17.6x	1.6x	BRACBANK	151,569	4.4%	39.3	6.7x	1.3x
Life Insurance	1,664	1,679	-14.85	-0.88%	15	46,898	0.7%	83.0	2.7%	NM	NM	WALTONHIL	120,300	3.5%	4.5	10.7x	0.9x
Telecommunication	4,351	4,347	+4.55	+0.10%	3	504,923	7.4%	22.9	0.8%	10.5x	3.6x	BATBC	117,882	3.4%	4.2	20.3x	2.0x
Pharmaceutical	3,047	3,059	-12.44	-0.41%	34	575,103	8.4%	297.1	9.8%	10.4x	1.5x	MARICO	83,450	2.4%	1.4	7.4x	18.1x
Fuel & Power	1,088	1,089	-1.07	-0.10%	23	287,304	4.2%	147.1	4.9%	9.1x	0.6x	BERGERPBL	71,734	2.1%	4.7	15.4x	3.3x
Cement	1,938	1,946	-8.10	-0.42%	7	91,171	1.3%	14.4	0.5%	21.2x	2.1x	UPGDCL	65,390	1.9%	1.6	7.0x	1.4x
Services & Real Estate	1,065	1,073	-7.92	-0.74%	9	57,962	0.8%	31.2	1.0%	25.8x	0.4x	BXPHARMA	64,775	1.9%	35.1	7.5x	1.1x
Engineering	2,484	2,497	-12.95	-0.52%	42	278,466	4.1%	276.5	9.1%	13.1x	0.8x	LHB	60,856	1.8%	6.0	12.4x	3.3x
Food & Allied	11,878	11,926	-48.05	-0.40%	21	216,846	3.2%	81.8	2.7%	30.9x	3.2x	CITYBANK	51,433	1.5%	59.4	3.4x	0.8x
IT	2,214	2,217	-2.32	-0.10%	11	29,323	0.4%	52.3	1.7%	50.1x	1.8x	RENATA	51,395	1.5%	2.6	18.8x	1.4x
Textile	1,332	1,340	-7.53	-0.56%	58	138,575	2.0%	751.7	24.9%	NM	0.9x	DUTCHBANGL	45,778	1.3%	4.4	3.5x	0.7x
Paper & Printing	4,413	4,452	-39.43	-0.89%	6	20,670	0.3%	26.1	0.9%	NM	1.4x	ISLAMIBANK	40,411	1.2%	0.2	NM	0.7x
Tannery	1,951	2,006	-55.22	-2.75%	6	22,652	0.3%	27.3	0.9%	NM	1.4x	UNILEVERCL	37,990	1.1%	0.3	62.1x	23.3x
Jute	14,050	14,380	-329.96	-2.29%	3	3,065	0.0%	91.7	3.0%	NM	1.9x	EBL	37,476	1.1%	1.8	4.2x	0.7x
Ceramics	420	415	+5.11	+1.23%	5	18,990	0.3%	16.7	0.6%	NM	1.3x	POWERGRID	34,725	1.0%	1.0	8.6x	0.3x
Miscellaneous	2,432	2,441	-9.67	-0.40%	15	132,035	1.9%	111.3	3.7%	37.3x	1.0x	PRIMEBANK	34,243	1.0%	12.0	3.7x	0.7x
Corporate Bond**	18,689	18,625	+63.98	+0.34%	16	41,334	0.6%	3.5	0.1%	NM	NM	BSRMSTEEL	33,460	1.0%	39.6	4.7x	0.8x
Treasury Bond**	2,207	2,206	+0.38	+0.02%	232	3,389,743	49.6%	1.4	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
BBS	10.7	+8.1%	9.4	NM	1.0x	SQURPHARMA	108,819	7.6%	7.5x	1.3x	ETL	13.3	-5.7%	98.6	20.8x	1.0x
SALVO	29.7	+6.1%	31.0	39.6x	1.7x	BRACBANK	81,590	5.7%	6.7x	1.3x	SAIHAMTEX	47.5	+1.7%	94.0	76.6x	1.1x
PROVATIINS	54.8	+5.8%	37.2	26.5x	2.3x	BXPHARMA	45,259	3.2%	7.5x	1.1x	MATINSPINN	73.9	+0.5%	91.8	16.8x	1.1x
QUASEMIND	38.8	+4.6%	7.3	31.6x	1.4x	PUBALIBANK	42,773	3.0%	5.2x	0.8x	SONALIANSH	231.2	-3.0%	91.6	64.0x	1.0x
SONARGAON	125.2	+4.4%	39.3	NM	6.9x	ISLAMIBANK	40,338	2.8%	NM	0.7x	ISLAMIINS	72.6	+2.1%	74.7	20.6x	2.8x
TUNGHAI	5.4	+3.85%	12.3	NM	NM	CITYBANK	35,812	2.5%	3.4x	0.8x	APEXSPINN	406.1	-0.7%	72.5	NM	5.2x
ICBSONAL11	8.3	+3.8%	39.2	NM	1x	WALTONHIL	34,779	2.4%	10.7x	0.9x	PTL	75.4	+0.4%	69.5	11.9x	1.6x
NORTHERN	98.3	+3.7%	0.0	NM	1.2x	GP	32,151	2.2%	9.1x	5.7x	1STPRIMFMF	28.9	-6.2%	64.7	NM	2.9x
RELIANCINS	95.9	+3.7%	39.2	10.0x	1.1x	BATBC	31,180	2.2%	20.3x	2.0x	CITYBANK	29.4	-0.7%	59.4	3.4x	0.8x
IFILISLMF1	5.7	+3.6%	3.9	NM	0.7x	EBL	26,443	1.8%	4.2x	0.7x	SONALILIFE	102.7	-3.7%	50.0	NM	NM
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,035	1.7%	18.8x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
APEXFOOT	170.3	-12.4%	15.2	21.5x	0.5x	LHB	22,724	1.6%	12.4x	3.3x	FINEFOODS	430.0	420.0	2.0	126	53.63
PF1STMF	12.0	-6.3%	25.7	NM	1x	PRIMEBANK	22,073	1.5%	3.7x	0.7x	SAIHAMTEX	45.0	44.0	8.0	858	38.57
1STPRIMFMF	28.9	-5.8%	6.6	NM	0.8x	UTTARABANK	17,661	1.2%	NM	0.7x	GREENDEL	61.2	61.2	1.0	268	16.41
DSHGARME	133.2	-5.8%	6.6	NM	0.8x	OLYMPIC	17,391	1.2%	13.9x	2.0x	GQBALLPEN	616.5	570.0	4.0	14	8.10
ETL	13.3	-5.7%	98.6	20.8x	1.0x	UCB	16,957	1.2%	3.8x	0.5x	PROVATIINS	51.0	50.0	3.0	125	6.35
ABB1STMF	3.4	-5.6%	4.0	NM	0.4x	ROBI	15,557	1.1%	14.9x	2.4x	SONALIANSH	240.0	239.0	2.0	20	4.79
JMISMDL	121.2	-5.2%	1.5	NM	1.5x	BSRMLTD	15,142	1.1%	4.1x	0.5x	SONARGAON	116.3	116.2	2.0	26	3.03
RENWICKJA	801.0	-4.9%	12.0	NM	NM	JAMUNABANK	13,675	1.0%	3.5x	0.8x	SOUTHEASTB	11.5	11.5	1.0	200	2.30
APEXTANRY	73.0	-4.8%	1.2	NM	0.4x	BEACONPHAR	13,614	0.9%	11.7x	2.7x	PRIMEBANK	28.2	28.2	1.0	73	2.06
KTL	12.7	-4.5%	8.3	NM	0.8x	* 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					DSHGARME	155.0	144.8	2.0	10	1.50

* 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
FINEFOODS	430.0	420.0	53.6	126	2
SAIHAMTEX	45.0	44.0	38.6	858	8
GREENDELT	61.2	61.2	16.4	268	1
GQBALLPEN	616.5	570.0	8.1	14	4
PROVATIINS	51.0	50.0	6.4	125	3
SONALIANS	240.0	239.0	4.8	20	2
SONARGAON	116.3	116.2	3.0	26	2
SOUTHEASTB	11.5	11.5	2.3	200	1
PRIMEBANK	28.2	28.2	2.1	73	1
DSHGARME	155.0	144.8	1.5	10	2
NITOLINS	57.0	54.3	1.4	24	2
ISLAMIINS	74.0	71.0	1.3	18	2
ALLTEX	25.1	25.1	1.3	50	1
ICBSONALI1	8.0	8.0	1.2	150	1
DULAMACOT	218.7	218.7	1.2	5	1
DOMINAGE	65.3	63.2	1.1	17	2
EBL	22.9	22.9	1.0	44	1
IFIC	4.9	4.9	1.0	200	1
ETL	15.4	15.4	0.8	50	1
PARAMOUNT	69.8	69.8	0.7	11	1
SAIHAMCOT	23.5	23.5	0.7	30	1
NHFIL	27.9	27.9	0.7	25	1
Total			150.0		43

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BDLAMPS		0.0%	10.0%	Record Date	9-Nov-26
APEXTANRY		0.0%	0.0%	Record Date	10-Nov-26
BEACONPHAR		0.0%	11.0%	Record Date	10-Nov-26
FINEFOODS		0.0%	35.6%	Record Date	12-Nov-26
DOREENPWR		0.0%	15.0%	Record Date	12-Nov-26
FEKDIL		0.0%	6.0%	Record Date	12-Nov-26
NAHEACP		0.0%	2.3%	Record Date	15-Nov-26

Important DSE News
LINDEBD

Basic and Diluted EPS was Tk. 5.23 for July-September 2026 as against Tk. 6.48 for July-September 2025; Basic and Diluted EPS was Tk. 17.78 for January-September 2026 as against Tk. 18.80 for January-September 2025. NOCFPS was Tk. 11.67 for January-September 2026 as against Tk. 8.25 for January-September 2025. NAV per share was Tk. 218.08 as on September 30, 2026 and Tk. 210.31 as on December 31, 2025. Reasons for deviation: EPS lower due to COGS impact driven by power and energy price hike, and higher distribution costs. NOCFPS Increased due to higher debtors' collection. NAVPS Due to profit earned during the period partially offset by dividend payout.

BSCPLC

The Board of Directors has recommended 47.50% Cash Dividend for the year ended June 30, 2026. Date of AGM: 20.12.2026, Time: 12:00 PM, Venue/Mode: Virtual meeting through Digital Platform (<https://bsccl.com.bd/agm>). Record Date: 17.11.2026. The Company has also reported Basic EPS of Tk. 15.14, Diluted EPS of Tk. 13.61, NAV per share of Tk. 102.39 and NOCFPS of Tk. 15.05 for the year ended June 30, 2026 as against Tk. 11.01, Tk. 9.93, Tk. 90.99 and Tk. 13.75 respectively for the year ended June 30, 2025.

BEACONPHAR

The Board of Directors has recommended 11% Cash Dividend for the year ended June 30, 2026. Date of AGM: 13.12.2026, Time: 11:00 AM, Venue: Digital Platform subject to approval from BSEC. Record Date: 10.11.2026. The Company has also reported EPS of Tk. 8.41, NAV per share of Tk. 35.83 and NOCFPS of Tk. 9.68 for the year ended June 30, 2026 as against Tk. 4.10, Tk. 28.86 and Tk. 6.93 respectively for the year ended June 30, 2025. EPS, NAV & NOCFPS: For the year ended 30 June 2026, the audited financial statements of Beacon Pharmaceuticals PLC show earnings per share (EPS) more than doubling to BDT 8.41 from BDT 4.10 (+105.19%), driven mainly by 30.96% higher sales. Net asset value (NAV) per share rose 24.14% to BDT 35.83 from BDT 28.86, as retained earnings strengthened shareholders' equity. Net operating cash flow per share (NOCFPS) increased 39.76% to BDT 9.68 from BDT 6.93, on higher receipts from customers and others.

SALVO

The Board of Directors has recommended 2.50% Cash Dividend for the year ended June 30, 2026. Date of AGM: 26.12.2026, Time: 10:30 AM, Venue: Hybrid System at Institution of Diploma Engineers Bangladesh, IDEB Bhaban, 160/A, Kakrail VIP Road, Dhaka-1000. Record Date: 16.11.2026. The Company has also reported EPS of Tk. 0.75, NAV per share of Tk. 17.02 and NOCFPS of Tk. 5.65 for the year ended June 30, 2026 as against Tk. 0.58, Tk. 16.57 and Tk. 5.68 respectively for the year ended June 30, 2025.

NCCBANK

Mr. M. A. Quasem, a Sponsor of the company, has expressed his intention to sell 200,000 shares out of his total holding of 4,900,000 shares of the Company at the prevailing market price in the Public & Block Market through Dhaka Stock Exchange PLC. within October 29, 2026.

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