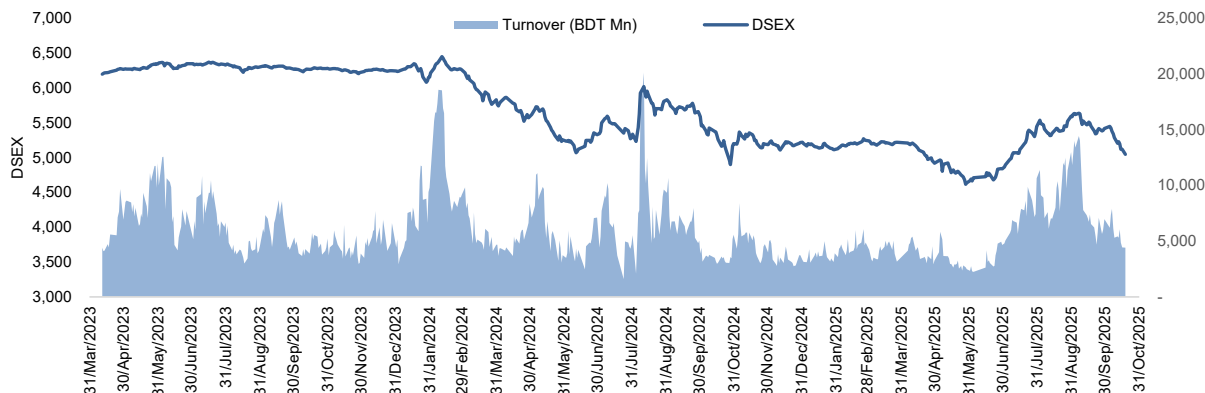


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.47%) lost 75.08 points and closed at 5,044.34. The blue-chip index DS30 (-1.51%), the Shariah-based index DSES (-2.21%), and the large-cap index CDSET (-0.69%) closed at 1,938.18, 1,062.33, and 1,037.23 points, respectively. All the large-cap sectors posted negative performance today. NBLI experienced the highest loss of 2.28% followed by Bank (-2.08%), Fuel & Power (-1.16%), Telecommunication (-0.74%), Engineering (-0.58%), Food & Allied (-0.20%), and Pharmaceutical (-0.05%), respectively. Block trades contributed 2.5% of the overall market turnover. Summit Alliance Port Limited (-9.0%) was the most traded share with a turnover of BDT 295 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,044.34	5,119.42	-75.08	-1.47%	-3.3%
DS30	1,938.18	1,967.92	-29.74	-1.51%	-0.1%
DSES	1,062.33	1,086.29	-23.96	-2.21%	-9.1%
CDSET	1,037.23	1,044.45	-7.22	-0.69%	-2.7%

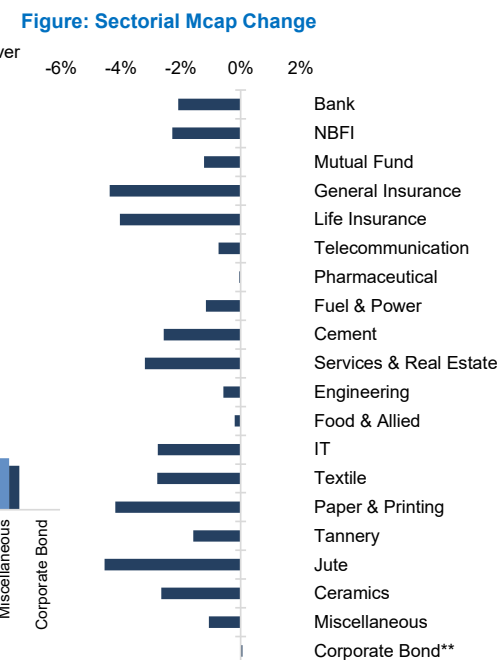
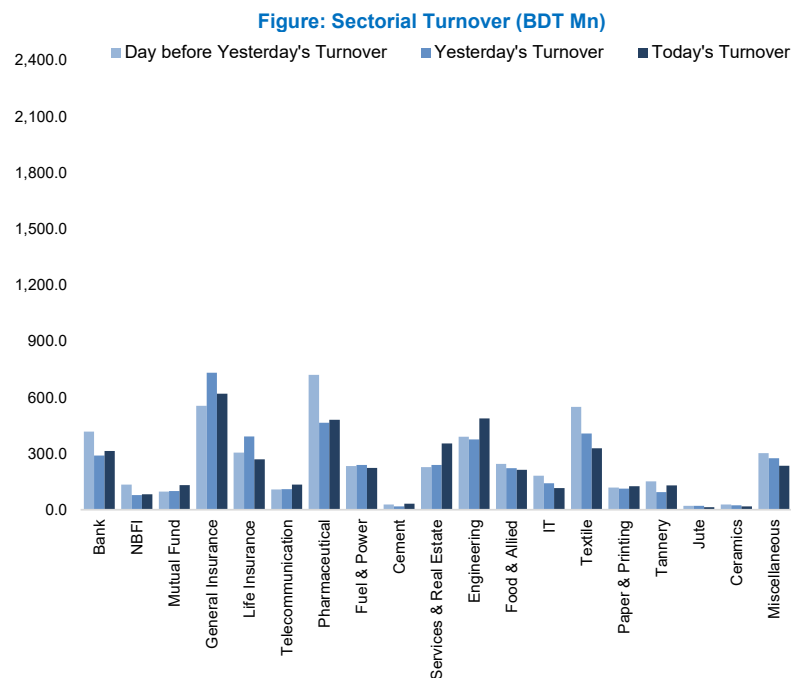
	Advanced	Declined	Unchanged	Total
All Category	44	314	38	396
A Category (Equity)	28	175	17	220
B Category (Equity)	7	71	2	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	9	68	19	96
Mutual Funds	5	19	12	36
Corporate Bonds	1	0	1	2
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,869,498	6,992,850	-1.8%
	Mn USD	56,379	57,392	
Turnover	Mn BDT	4,424	4,445	-0.5%
	Mn USD	36	36	
Volume	Mn Shares	144	137	+4.9%
No. of Trade		148,323	149,855	-1.0%

* Average Interbank Exchange Rate is BDT 121.84 as of Oct 19, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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Market PE 15.5x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBLI, 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	1,392	1,421	-29.62	-2.08%	36	658,530	9.6%	313.6	7.3%	NM	0.7x	GP	387,671	11.4%	7.6	13.2x	6.8x
NBFI	977	1,000	-22.82	-2.28%	23	93,079	1.4%	83.2	1.9%	NM	NM	SQURPHARMA	189,169	5.5%	83.1	8.0x	1.4x
Mutual Fund	532	539	-6.59	-1.22%	37	25,515	0.4%	131.9	3.1%	NM	0.5x	ROBI	150,329	4.4%	108.6	17.3x	2.3x
General Insurance	2,979	3,115	-136.20	-4.37%	43	85,022	1.2%	620.1	14.4%	14.3x	1.3x	BATBC	138,294	4.1%	25.4	11.1x	2.6x
Life Insurance	1,961	2,044	-82.41	-4.03%	15	52,158	0.8%	269.8	6.3%	NM	NM	BRACBANK	132,197	3.9%	46.3	9.3x	1.6x
Telecommunication	4,799	4,835	-35.85	-0.74%	3	562,764	8.2%	134.9	3.1%	14.1x	4.1x	WALTONHIL	127,657	3.7%	5.0	12.3x	1.1x
Pharmaceutical	2,923	2,924	-1.38	-0.05%	34	554,125	8.1%	481.0	11.2%	12.7x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,089	1,102	-12.77	-1.16%	23	288,595	4.2%	222.8	5.2%	23.8x	0.6x	MARICO	87,573	2.6%	3.3	14.3x	26.3x
Cement	1,872	1,921	-49.45	-2.57%	7	89,191	1.3%	31.6	0.7%	20.6x	2.0x	UPGDCL	81,273	2.4%	5.0	7.0x	1.9x
Services & Real Estate	959	990	-31.66	-3.20%	9	52,719	0.8%	354.1	8.2%	23.3x	0.4x	BERGERPBL	69,274	2.0%	2.2	19.7x	4.0x
Engineering	2,367	2,381	-13.70	-0.58%	42	267,045	3.9%	486.9	11.3%	13.1x	0.8x	LHB	57,836	1.7%	23.9	15.4x	3.0x
Food & Allied	13,499	13,526	-26.61	-0.20%	21	246,996	3.6%	213.1	4.9%	18.7x	3.9x	RENATA	51,590	1.5%	8.7	18.3x	1.5x
IT	1,751	1,801	-49.79	-2.76%	11	23,099	0.3%	115.6	2.7%	19.4x	1.5x	BXPHARMA	47,600	1.4%	18.0	7.4x	1.0x
Textile	1,085	1,116	-31.06	-2.78%	58	112,985	1.6%	328.0	7.6%	99.6x	0.8x	UNILEVERCL	45,938	1.3%	0.2	72.3x	25.2x
Paper & Printing	4,592	4,792	-200.50	-4.18%	6	20,745	0.3%	125.3	2.9%	NM	1.0x	ICB	39,113	1.1%	2.3	NM	0.9x
Tannery	1,985	2,017	-31.90	-1.58%	6	22,118	0.3%	129.3	3.0%	NM	1.6x	DUTCHBANGL	37,315	1.1%	1.6	9.9x	0.7x
Jute	11,346	11,886	-540.15	-4.54%	3	2,497	0.0%	14.0	0.3%	NM	NM	EBL	36,544	1.1%	10.6	5.2x	0.8x
Ceramics	362	372	-9.86	-2.65%	5	16,256	0.2%	18.6	0.4%	NM	1.1x	CITYBANK	35,901	1.1%	26.1	3.3x	0.7x
Miscellaneous	3,991	4,034	-42.96	-1.06%	15	216,727	3.2%	235.1	5.5%	86.0x	1.7x	PUBALIBANK	35,009	1.0%	3.0	4.8x	0.6x
Corporate Bond**	16,776	16,765	+10.87	+0.06%	16	37,038	0.5%	1.0	0.0%	NM	NM	PRIMEBANK	31,104	0.9%	18.3	3.7x	0.8x
Treasury Bond**	2,271	2,322	-50.59	-2.18%	233	3,446,494	50.1%	1.5	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
NHFIL	23.4	+9.9%	18.3	NM	1.2x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	SAPORTL	40.6	-9.0%	295.2	15.1x	1.2x
BSRMSTEEL	70.0	+8.7%	143.8	5.1x	0.8x	ISLAMIBANK	74,730	5.3%	NM	0.8x	ORIONINFU	484.4	-1.7%	184.4	NM	30.8x
ACMEPL	15.5	+7.6%	34.8	NM	0.9x	BEXIMCO	69,463	4.9%	NM	1.3x	BSRMSTEEL	70.0	+8.7%	143.8	5.1x	0.8x
EMERALDOIL	15.8	+6.0%	6.4	13.5x	NM	BATBC	50,233	3.6%	11.1x	2.6x	DOMINAGE	22.1	-	139.6	NM	1.3x
BSRMLTD	87.2	+3.9%	21.1	4.2x	0.5x	WALTONHIL	46,773	3.3%	12.3x	1.1x	APEXFOOT	257.1	-1.0%	117.0	29.8x	0.6x
DOREENPWR	27.0	+3.85%	4.4	10.3x	0.5x	BRACBANK	46,489	3.3%	9.3x	1.6x	PRAGATILIF	252.4	-7.6%	115.3	NM	NM
BIFC	2.8	+3.7%	0.0	NM	NM	GP	44,708	3.2%	13.2x	6.8x	ROBI	28.7	-2.0%	108.6	17.3x	2.3x
REGENTTEX	2.8	+3.7%	0.0	NM	0.1x	RENATA	32,968	2.3%	18.3x	1.5x	PRAGATIINS	73.4	-9.6%	106.4	13.3x	1.4x
DAFODILCOM	45.7	+3.6%	1.7	NM	3.5x	BXPHARMA	23,409	1.7%	7.4x	1.0x	CVOPRL	171.7	-6.8%	102.5	44.9x	13.1x
SIMTEX	28.7	+3.6%	72.4	29.6x	1.3x	PUBALIBANK	22,905	1.6%	4.8x	0.6x	SONALIPAPR	240.8	-7.0%	93.7	23.3x	1.4x
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)
MONNOAGML	284.2	-14.2%	13.5	NM	2.5x	LHB	20,953	1.5%	15.4x	3.0x	LOVELLO	103.0	85.0	5.0	264	24.16
KBPPWBIL	102.3	-9.9%	89.8	NM	9x	OLYMPIC	20,496	1.5%	15.7x	2.4x	KBPPWBIL	124.9	102.3	5.0	202	22.70
PRAGATIINS	73.4	-9.6%	106.4	13.3x	1.4x	ALARABANK	18,282	1.3%	34.9x	0.8x	AL-HAJTEX	128.0	125.0	8.0	127	15.96
HRTEX	18.1	-9.5%	1.0	NM	6.1x	BEACONPHAR	17,838	1.3%	27.3x	3.6x	FIRSTSBANK	3.3	3.3	5.0	3,825	12.62
NEWLINE	3.9	-9.3%	1.2	NM	0.2x	PRIMEBANK	16,142	1.1%	3.7x	0.8x	FINEFOODS	280.0	280.0	1.0	31	8.68
GEMINISEA	126.4	-9.0%	8.8	NM	10.3x	ROBI	14,876	1.1%	17.3x	2.3x	SAPORTL	45.2	43.8	2.0	124	5.57
SAPORTL	40.6	-9.0%	295.2	15.1x	1.2x	UTTARABANK	13,699	1.0%	NM	0.8x	PRAGATILIF	272.2	272.0	3.0	19	5.28
NFML	11.3	-8.9%	5.7	NM	1.0x	NBL	13,055	0.9%	NM	NM	SOUTHEASTB	9.1	9.1	2.0	300	2.73
PIONEERINS	51.8	-8.8%	44.8	12.0x	1.2x	BSRMLTD	12,852	0.9%	4.2x	0.5x	HAMI	103.6	103.6	2.0	25	2.59
SIPLC	56.7	-8.5%	65.0	9.9x	2.1x	* 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										

* 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
LOVELLO	103.0	85.0	24.2	264	5
KBPPWBIL	124.9	102.3	22.7	202	5
AL-HAJTEX	128.0	125.0	16.0	127	8
FIRSTSBANK	3.3	3.3	12.6	3,825	5
FINEFOODS	280.0	280.0	8.7	31	1
SAPORTL	45.2	43.8	5.6	124	2
PRAGATILIF	272.2	272.0	5.3	19	3
SOUTHEASTB	9.1	9.1	2.7	300	2
HAMI	103.6	103.6	2.6	25	2
GQBALLPEN	495.2	495.2	2.5	5	1
ACMEPL	15.3	15.3	1.9	123	1
GENEXIL	28.0	28.0	1.4	50	1
ZAHEENSPIN	5.2	5.2	1.4	266	2
MEGHNALIFE	59.9	59.9	1.2	20	1
POPULARLIF	50.7	50.7	1.0	20	1
PRAGATIINS	73.1	73.1	0.6	8	1
ALIF	5.3	5.3	0.5	100	1
SPCL	41.0	41.0	0.5	13	1
SALVOCHEM	30.9	30.9	0.5	16	1
CVOPRL	200.2	200.2	0.5	3	1
IPDC	22.0	22.0	0.5	23	1
Total			112.8		46

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
DULAMIAHOT		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
INDEXAGRO		5.0%	12.0%	Record Date	9-Nov-25
LANKABAFIN		0.0%	0.0%	Record Date	10-Nov-25
APEXTANRY		0.0%	0.0%	Record Date	10-Nov-25

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Important DSE News

ANLIMAYARN

The Board of Directors has recommended No Dividend for the year ended June 30, 2025. Date of AGM: 22.12.2025, Time: 11:30 AM, Venue: Factory premises, Karnapara, Savar, Dhaka-1340 and the AGM will be held through Hybrid System both Physical presence and Digital Platform. Record Date: 10.11.2025. The Company has also reported EPS of Tk. (2.99), NAV per share of Tk. 5.63 and NOCFPS of Tk. 0.69 for the year ended June 30, 2025 as against EPS of Tk. (1.80), NAV per share of Tk. 8.62 and NOCFPS of Tk. 0.22 for the year ended June 30, 2024.

LINDEBD

(Q3 Un-audited): Basic and Diluted EPS was Tk. 6.48 for July-September 2025 as against Tk. 400.01 for July-September 2024; EPS was Tk. 18.80 for January-September 2025 as against Tk. 413.05 for January-September 2024. NOCFPS was Tk. 8.25 for January-September 2025 as against Tk. 12.97 for January-September 2024. NAV per share was Tk. 208.14 as on September 30, 2025 and Tk. 229.34 as on December 31, 2024. Reasons for deviation: Q3 and YTD Sep 2024 EPS were higher due to one-off income resulting from divestment of hardgoods business. NAVPS has decreased due to higher dividend paid partially offset by profit earned during the period. NOCFPS has decreased due to settlement of liabilities during the period

MONNOAGML

The Board of Directors has recommended 5% Cash dividend only for General Shareholders excluding Sponsors & Directors for the year ended June 30, 2025. The quantities of securities held by the said sponsors and/or directors who will not be entitled to recommended dividend: 1,320,083 shares. The amount payable to the general shareholders is Tk. 1,540,086.50. Date of AGM: 11.12.2025, Time: 4:00 PM, Venue: Digital Platform through the link <https://monnoagro.virtualagmbd.com>. Record Date: 13.11.2025. The Company has also reported EPS of Tk. 1.00, NAV per share of Tk. 110.86 and NOCFPS of Tk. (0.81) for the year ended June 30, 2025 as against as against EPS of Tk. 2.15, NAV per share of Tk. 134.03 and NOCFPS of Tk. 0.50 for the year ended June 30, 2024.

BSRMSTEEL

The Board of Directors has recommended 50% cash dividend for the year ended June 30, 2025. Date of AGM: 24.12.2025, Time: 10:30 AM, Venue: Digital Platform. Record Date: 10.11.2025. The Company has also reported EPS of Tk. 13.77, NAV per share of Tk. 90.52 and NOCFPS of Tk. 19.44 for the year ended June 30, 2025 as against Tk. 10.10, Tk. 80.93 and Tk. 16.32 respectively for the year ended June 30, 2024.

NHFIL

(Q3 Un-audited): EPS was Tk. 0.58 for July-September 2025 as against Tk. 0.31 for July-September 2024; EPS was Tk. 1.02 for January-September 2025 as against Tk. 0.91 for January-September 2024. NOCFPS was Tk. 10.11 for January-September 2025 as against Tk. (16.73) for January-September 2024. NAV per share was Tk. 18.98 as on September 30, 2025 and Tk. 17.95 as on December 31, 2024. Reasons for deviation in NOCFPS: The increase in cash inflow from operating activities for the period ended 30 September 2025 was primarily to higher customer deposits. Consequently, the Net Operating Cash Flow Per Share (NOCFPS) for the period showed an improvement compared to the corresponding period ended 30 September 2024.

INDEXAGRO

The Board of Directors has recommended 12% Cash Dividend and 5% Stock Dividend for the year ended June 30, 2025. Date of AGM: 15.12.2025, Time: 11:00 AM, Venue: To be notified later. Record Date: 09.11.2025. The Company has also reported EPS of Tk. 5.52, NAV per share of Tk. 85.74 and NOCFPS of Tk. 10.26 for the year ended June 30, 2025 as against EPS of Tk. 5.48, NAV per share of Tk. 82.14 and NOCFPS of Tk. 14.77 for the year ended June 30, 2024.

BSRMLTD

The Board of Directors has recommended 50% Cash Dividend for the year ended June 30, 2025. Date of AGM: 24.12.2025, Time: 12:00 PM, Venue: Digital Platform. Record Date: 10.11.2025. The Company has also reported Consolidated EPS of Tk. 20.57, Consolidated NAV per share of Tk. 166.79 and Consolidated NOCFPS of Tk. 43.81 for the year ended June 30, 2025 as against Tk. 14.48, Tk. 150.06 and Tk. 13.46 respectively for the year ended June 30, 2024.

The company has informed that the Board of Directors has approved an investment of BDT 200 Crore in BSRM Wires Limited through subscription to its shares. This strategic investment aims to enhance shareholder value by diversifying the groups portfolio into the production of high-quality wire products such as LRPC, Electrodes, ACSR Core Wires, Chain-Link Fence and others. It is also proposed to set up a large wire rods picking station and a state of art quality fastener and bolts nuts producing plant in the country. The Board has also resolved to increase the Company's Corporate Social Responsibility (CSR) initiatives across various sectors, including education, healthcare, livelihood support, treatment for underprivileged patients, donations to specialized hospitals, and environmental sustainability. To support these efforts, the Company will allocate an annual CSR budget equivalent to 0.25% of the previous year's revenue.

ISLAMICFIN

(Q3 Un-audited): EPS was Tk. (0.87) for July-September 2025 as against Tk. (5.71) for July-September 2024; EPS was Tk. (1.94) for January-September 2025 as against Tk. (8.10) for January-September 2024. NOCFPS was Tk. 0.36 for January-September 2025 as against Tk. (1.03) for January-September 2024. NAV per share was Tk. (1.74) as on September 30, 2025 and Tk. 0.20 as on December 31, 2024.

Mr. Abul Quasem Haider, Chairman of the Company, has expressed his intention to buy 2,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within October 31, 2025.

BDAUTOCA

The company has informed that they have decided to discontinue the operation of Unit 3 (CNG Conversion business) as this unit suffering from decreasing trend of revenue and profitability of Unit 3. During the year, Unit 3 suffered from business loss. The Unit 3 has some fixed assets consisting of Tk. 9,608,263.00 at WDV, (part of such assets shall be absorbed by Unit 2 (CNG sales Unit) and part shall be disposed of) and the inventory balance of Tk. 3,019,691.00 shall be sold.

LOVELLO

Mr. Md. Ekramul Haque, a Sponsor Director of the company, has completed the transfer of 1,000,000 shares of the company to each of his daughters, Ms. Muhsinina Sharika Ekram and Ms. Muhsinina Taufika Ekram (both Directors of the company), and 2,000,000 shares of the company to his brother, Mr. Md. Zahedul Haque (a general shareholder of the company), by way of gift outside the trading system of the Exchange as per declaration disseminated by DSE on 16.10.2025.

MTB

Associated Builders Corporation Ltd., a Sponsor of the Company, has further informed that it has completed its sale of 17,90,000 shares and Mr. Rashed Ahmed Chowdhury, a Director of the company, has informed that he has completed his buying of 17,90,000 shares at prevailing market price through Dhaka Stock Exchange Limited as per declaration news disseminated by DSE on 15.10.2025.

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