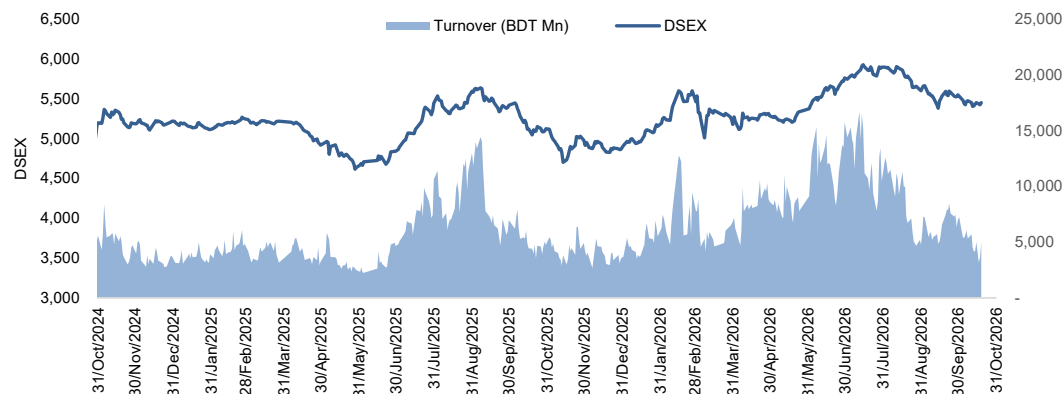


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.52%) gained 27.95 points and closed at 5,450.63. The blue-chip index DS30 (+0.84%), the Shariah-based index DSES (+0.16%), and the large-cap index CDSET (+0.72%) closed at 2,103.40, 1,070.40, and 1,106.64 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 1.21% followed by Fuel & Power (+0.78%), Engineering (+0.59%), Pharmaceutical (+0.40%), NBFI (+0.26%), Food & Allied (+0.04%), and Telecommunication (-0.02%), respectively. Block trades contributed 5.5% of the overall market turnover. Prime Bank Ltd. (+4.2%) was the most traded share with a turnover of BDT 279 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,450.63	5,422.67	+27.95	+0.52%	+12.0%
DS30	2,103.40	2,085.97	+17.43	+0.84%	+13.5%
DSES	1,070.40	1,068.66	+1.74	+0.16%	+7.0%
CDSET	1,106.64	1,098.73	+7.91	+0.72%	+10.1%

	Advanced	Declined	Unchanged	Total
All Category	187	136	58	381
A Category (Equity)	113	61	17	191
B Category (Equity)	28	32	12	72
N Category (Equity)	0	0	0	0
Z Category (Equity)	46	43	29	118
Mutual Funds	23	1	7	31
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,815,877	6,825,023	-0.1%
	Mn USD	55,161	55,235	
Turnover	Mn BDT	5,026	3,656	+37.5%
	Mn USD	41	30	
Volume	Mn Shares	178	116	+52.9%
No. of Trade		145,568	133,462	+9.1%

* Average Interbank Exchange Rate is BDT 123.56 as of Oct 18, 2026

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Figure: Sectorial Turnover (BDT Mn)

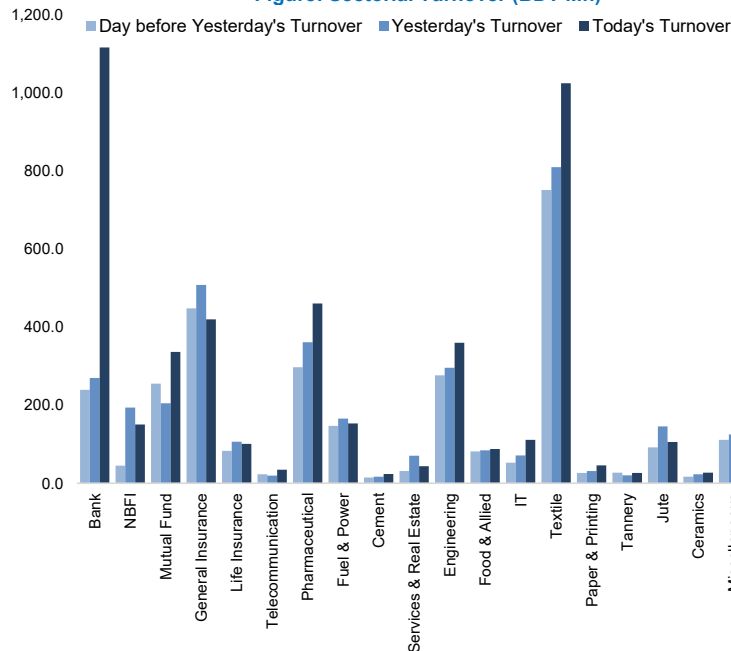
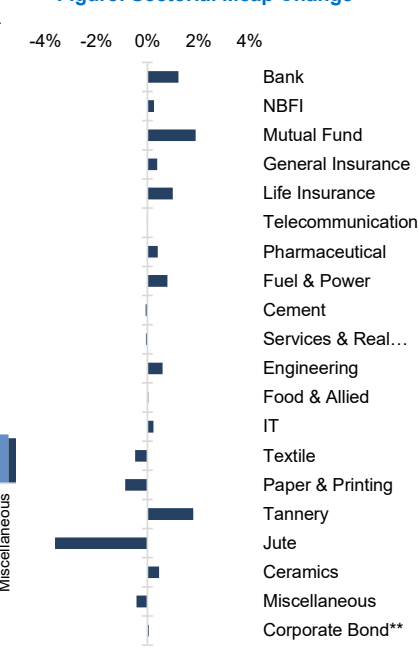


Figure: Sectorial Mcap Change



Market PE 12.6x

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	1,558	1,540	+18.67	+1.21%	36	742,724	10.9%	1,117.4	23.5%	7.3x	0.7x	GP	322,047	9.4%	14.0	9.1x	5.7x
NBFI	1,023	1,020	+2.62	+0.26%	23	97,267	1.4%	150.6	3.2%	NM	1.0x	SQURPHARMA	194,665	5.7%	33.4	7.5x	1.3x
Mutual Fund	655	643	+12.15	+1.89%	35	29,647	0.4%	336.9	7.1%	NM	0.6x	ROBI	155,567	4.5%	18.4	14.9x	2.4x
General Insurance	4,273	4,257	+16.25	+0.38%	43	120,740	1.8%	420.0	8.8%	17.4x	1.6x	BRACBANK	155,233	4.5%	230.2	6.8x	1.4x
Life Insurance	1,680	1,663	+16.61	+1.00%	15	47,353	0.7%	100.9	2.1%	NM	NM	WALTONHIL	120,996	3.5%	4.7	10.8x	1.0x
Telecommunication	4,350	4,351	-0.88	-0.02%	3	504,715	7.4%	35.1	0.7%	10.5x	3.6x	BATBC	117,504	3.4%	9.3	20.2x	2.0x
Pharmaceutical	3,045	3,033	+12.17	+0.40%	34	574,815	8.4%	460.7	9.7%	10.2x	1.4x	MARICO	83,324	2.4%	11.8	7.4x	18.1x
Fuel & Power	1,095	1,086	+8.49	+0.78%	23	288,986	4.2%	153.5	3.2%	9.2x	0.6x	BERGERPBL	71,660	2.1%	1.3	15.3x	3.3x
Cement	1,932	1,933	-1.41	-0.07%	7	90,898	1.3%	23.7	0.5%	21.1x	2.0x	UPGDCL	65,737	1.9%	1.7	7.1x	1.4x
Services & Real Estate	1,065	1,065	-0.59	-0.06%	9	57,941	0.8%	43.4	0.9%	25.8x	0.4x	BXPHARMA	64,999	1.9%	29.9	7.5x	1.1x
Engineering	2,496	2,482	+14.64	+0.59%	42	279,826	4.1%	360.3	7.6%	13.2x	0.8x	LHB	60,624	1.8%	12.4	12.3x	3.3x
Food & Allied	11,851	11,846	+4.80	+0.04%	21	216,346	3.2%	88.1	1.9%	30.8x	3.2x	CITYBANK	51,782	1.5%	186.5	3.4x	0.8x
IT	2,203	2,197	+5.27	+0.24%	11	29,168	0.4%	111.5	2.3%	49.8x	1.8x	RENATA	51,246	1.5%	7.4	14.1x	1.4x
Textile	1,329	1,335	-6.39	-0.48%	58	138,227	2.0%	1,025.5	21.6%	NM	0.9x	DUTCHBANGL	47,707	1.4%	22.8	3.7x	0.8x
Paper & Printing	4,380	4,419	-38.65	-0.87%	6	20,515	0.3%	45.6	1.0%	NM	1.4x	ISLAMIBANK	39,928	1.2%	1.5	NM	0.7x
Tannery	1,988	1,953	+35.02	+1.79%	6	23,082	0.3%	26.3	0.6%	NM	1.5x	EBL	38,627	1.1%	48.4	4.3x	0.8x
Jute	13,791	14,309	-517.91	-3.62%	3	3,008	0.0%	105.8	2.2%	NM	1.9x	UNILEVERCL	38,402	1.1%	0.2	62.7x	23.5x
Ceramics	419	417	+1.91	+0.46%	5	18,945	0.3%	27.0	0.6%	NM	1.2x	PRIMEBANK	35,949	1.0%	279.0	3.9x	0.8x
Miscellaneous	2,417	2,427	-10.37	-0.43%	15	131,239	1.9%	115.5	2.4%	37.1x	1.0x	POWERGRID	35,547	1.0%	4.0	8.8x	0.3x
Corporate Bond**	18,902	18,891	+10.85	+0.06%	16	41,805	0.6%	0.0	0.0%	NM	NM	BSRMSTEEL	33,949	1.0%	46.1	4.7x	0.8x
Treasury Bond**	2,191	2,205	-14.65	-0.66%	231	3,363,124	49.3%	0.0	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
APEXFOOT	168.2	+15.3%	8.5	24.5x	0.5x	SQURPHARMA	108,720	7.6%	7.5x	1.3x	PRIMEBANK	29.5	+4.2%	279.0	3.9x	0.8x
ICBSONALI1	8.6	+8.9%	99.3	NM	0.9x	BRACBANK	83,562	5.8%	6.8x	1.4x	BRACBANK	67.8	+2.3%	230.2	6.8x	1.4x
RENWICKJA	832.1	+7.5%	7.8	NM	NM	BXPHARMA	45,414	3.2%	7.5x	1.1x	PTL	77.2	-0.9%	205.4	12.2x	1.6x
EXIM1STMF	5.8	+7.4%	28.8	NM	0.6x	PUBALIBANK	42,879	3.0%	5.3x	0.8x	CITYBANK	29.6	+0.7%	186.5	3.4x	0.8x
RSRMSTEEL	7.4	+7.2%	2.3	NM	0.2x	ISLAMIBANK	39,856	2.8%	NM	0.7x	SAIHAMTEX	47.6	-0.6%	137.7	76.8x	1.1x
ICBEPMF1S1	6.3	+6.78%	4.2	NM	0.7x	CITYBANK	36,056	2.5%	3.4x	0.8x	MATINSPIINN	78.3	+5.1%	119.9	12.3x	1.1x
COPPERTECH	22.0	+6.3%	14.9	32.4x	2x	WALTONHIL	34,980	2.4%	10.8x	1.0x	IPDC	30.8	+0.7%	113.3	25.9x	1.8x
PHOENIXFIN	3.6	+5.9%	1.7	5.9x	NM	GP	32,205	2.2%	9.1x	5.7x	ASIATICLAB	110.2	+4.3%	107.8	25.3x	1.9x
PURABIGEN	28.1	+5.2%	11.0	12.3x	1.9x	BATBC	31,080	2.2%	20.2x	2.0x	SONALIANSH	226.3	-4.4%	105.4	62.7x	1.0x
KAY&QUE	409.4	+5.2%	19.2	26.0x	3.7x	EBL	27,255	1.9%	4.3x	0.8x	SHARPIND	11.2	-11.8%	105.1	NM	1.5x
						RENATA	24,962	1.7%	14.1x	1.4x						
						PRIMEBANK	23,173	1.6%	3.9x	0.8x						
						LHB	22,637	1.6%	12.3x	3.3x						
						UTTARABANK	17,745	1.2%	NM	0.7x						
						OLYMPIC	17,203	1.2%	13.7x	2.0x						
						UCB	16,957	1.2%	3.9x	0.5x						
						ROBI	15,557	1.1%	14.9x	2.4x						
						BSRMLTD	15,094	1.0%	4.1x	0.5x						
						JAMUNABANK	13,734	1.0%	3.5x	0.8x						
						BEACONPHAR	13,351	0.9%	11.4x	2.7x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
SHARPIND	11.2	-11.8%	105.1	NM	1.5x											
PREMIERLEA	1.7	-5.6%	0.3	NM	NM											
MLDYEING	9.7	-4.5%	1.2	NM	0.2x											
FAMILYTEX	2.1	-4.5%	1.2	NM	0.2x											
SONALIANSH	226.3	-4.4%	105.4	62.7x	1.0x											
FEKDIL	19.4	-4.0%	32.8	NM	1.0x											
GENNEXT	2.5	-3.8%	1.7	22.7x	0.2x											
TUNGHAI	5.1	-3.8%	2.6	NM	NM											
DSHGARME	126.5	-3.7%	5.2	NM	0.8x											
AMANFEED	27.8	-2.8%	8.2	NM	1.0x											
						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
						SAIHAMTEX	52.6	45.0	13.0	1,766	83.25					
						RENATA	445.5	445.5	2.0	100	44.55					
						PRIMEBANK	28.2	28.2	8.0	800	22.56					
						DAFODILCOM	155.7	150.0	9.0	144	22.07					
						SQURPHARMA	219.3	219.3	1.0	100	21.93					
						GREENDELT	60.1	60.1	1.0	268	16.11					
						GQBALLPEN	620.0	570.0	9.0	24	13.84					
						BRACBANK	67.2	67.0	3.0	200	13.41					
						SONARGAON	122.0	120.0	6.0	70	8.47					
						MTB	13.0	12.9	2.0	300	3.89					

* 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
SAIHAMTEX	52.6	45.0	83.2	1,766	13
RENATA	445.5	445.5	44.6	100	2
PRIMEBANK	28.2	28.2	22.6	800	8
DAFODILCOM	155.7	150.0	22.1	144	9
SQURPHARMA	219.3	219.3	21.9	100	1
GREENDELT	60.1	60.1	16.1	268	1
GQBALLPEN	620.0	570.0	13.8	24	9
BRACBANK	67.2	67.0	13.4	200	3
SONARGAON	122.0	120.0	8.5	70	6
MTB	13.0	12.9	3.9	300	2
ASIAINS	41.9	41.9	3.8	90	1
MALEKSPIN	49.0	47.7	3.7	77	2
BDAUTOCA	183.0	183.0	3.5	19	4
KARNAPHULI	50.5	50.5	3.4	67	1
ISLAMIINS	72.9	70.2	2.6	36	2
FINEFOODS	440.0	440.0	2.4	5	1
DOMINAGE	66.0	64.0	1.6	25	2
MATINSPINN	67.1	67.1	1.2	19	1
TRUSTBANK	14.3	14.3	1.2	85	2
BANKASIA	15.0	15.0	1.1	70	1
CVOPRL	148.4	148.4	1.0	7	1
HAKKANIPUL	72.3	72.3	0.8	11	1
Total			278.5		77

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MATINSPINN		10.0%	45.0%	Record Date	12-Nov-26
NAHEEACP		0.0%	2.3%	Record Date	15-Nov-26

Important DSE News

DULAMIACOT

The Board of Directors has recommended 1% Cash Dividend only for General Public Shareholders for the year ended June 30, 2026. The general public shareholders hold 5,061,770 shares (proposed gross dividend amount Tk. 5,06,177) out of total 7,556,600 shares of the company. Date of AGM: 13.12.2026, Time: 11:00 AM, Venue: Anchor Tower, 108, Bir Uttam C. R. Dutta Road, Dhaka-1205 (Hybrid System). Record Date: 16.11.2026. The Company has also reported EPS of Tk. 0.20, NAV per share of Tk. (39.81) and NOCFPS of Tk. 0.53 for the year ended June 30, 2026 as against Tk. 0.25, Tk. (39.83) and Tk. 0.41 respectively for the year ended June 30, 2025.

SHARPIND

The Board of Directors has recommended No Dividend for the year ended June 30, 2026. Date of AGM: 24 December, 2026, Time: 12:30 PM, Venue: Hybrid System. i. Physical Presence at "Greentech Resort and Convention Center", Pingail, Bhabanipur, Gazipur. ii. <https://sharpindustries.bdvirtualagm.com>. Record Date: November 19, 2026. The Company has also reported EPS of Tk. (2.39), NAV per share of Tk. 7.68 and NOCFPS of Tk. 0.52 for the year ended June 30, 2026 as against EPS of Tk. 0.11, NAV per share of Tk. 10.08 and NOCFPS of Tk. (1.74) for the year ended June 30, 2025.

PURABIGEN

EPS was Tk. 0.62 for July-September 2026 as against Tk. 0.45 for July-September 2025; EPS was Tk. 1.46 for January-September 2026 as against Tk. 1.23 for January-September 2025. NOCFPS was Tk. 1.75 for January-September 2026 as against Tk. 0.93 for January-September 2025. NAV per share was Tk. 15.08 as on September 30, 2026 and Tk. 14.29 as on December 31, 2025.

QUASEMIND

The Board of Directors has recommended 2% Cash and 8% Stock Dividend (Subject to BSEC approval) for the year ended June 30, 2026. Date of AGM: 15.12.2026, Time: 11:00 AM, Venue: Through Hybrid System at Palm View (Army Golf Club), Kurmitola, Dhaka. Record Date: 15.11.2026 (For attending 45th AGM and entitlement of cash dividend but not for entitlement of bonus share). The Company has also reported EPS of Tk. 1.07, NAV per share of Tk. 57.28 and NOCFPS of Tk. 1.21 for the year ended June 30, 2026 as against EPS of Tk. 1.04, NAV per share of Tk. 29.06 and NOCFPS of Tk. 0.88 for the year ended June 30, 2025. Disclosure for recommending stock dividend: The stock dividend has been recommended with a view to capitalize retained earnings as capital.

MATINSPINN

The Board of Directors has recommended 45% Cash and 10% Stock dividend for the year ended June 30, 2026. Date of AGM: 10.12.2026, Time: 11:30 AM, Venue: Digital Platform. Record Date: 12.11.2026. The Company has also reported EPS of Tk. 6.36, NAV per share with revaluation reserve of Tk. 70.69 and NOCFPS of Tk. 5.31 for the year ended June 30, 2026 as against Tk. 4.70, Tk. 69.89 and Tk. 11.67 respectively for the year ended June 30, 2025.

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