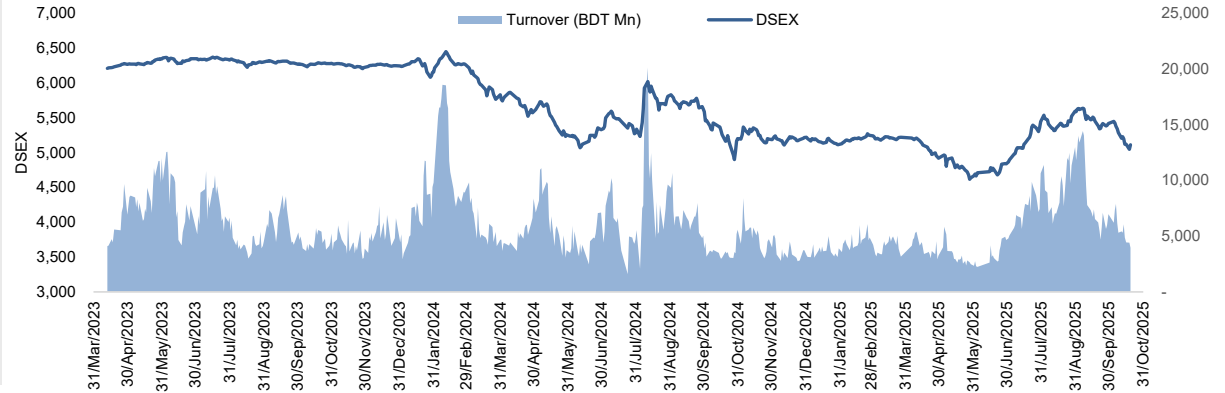


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.33%) gained 67.26 points and closed at 5,111.60. The blue-chip index DS30 (+1.43%), the Shariah-based index DSES (+1.78%), and the large-cap index CDSET (+0.92%) closed at 1,965.83, 1,081.20, and 1,046.81 points, respectively. All of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.85% followed by Fuel & Power (+1.80%), Engineering (+1.48%), Bank (+1.21%), Pharmaceutical (+1.08%), Food & Allied (+0.83%), and Telecommunication (+0.56%), respectively. Block trades contributed 2.8% of the overall market turnover. Dominage Steel Building Systems Limited (+4.1%) was the most traded share with a turnover of BDT 243 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,111.60	5,044.34	+67.26	+1.33%	-2.0%
DS30	1,965.83	1,938.18	+27.66	+1.43%	+1.3%
DSES	1,081.20	1,062.33	+18.86	+1.78%	-7.5%
CDSET	1,046.81	1,037.23	+9.58	+0.92%	-1.8%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	300	53	45	398
<b>A Category (Equity)</b>	167	35	19	221
<b>B Category (Equity)</b>	76	1	4	81
<b>N Category (Equity)</b>	0	0	0	0
<b>Z Category (Equity)</b>	57	17	22	96
<b>Mutual Funds</b>	21	6	9	36
<b>Corporate Bonds</b>	0	2	0	2
<b>Treasury Bonds</b>	0	3	0	3

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT	7,033,039	6,869,498	+2.4%
	Mn USD	57,722	56,379	
<b>Turnover</b>	Mn BDT	3,946	4,424	-10.8%
	Mn USD	32	36	
<b>Volume</b>	Mn Shares	141	144	-1.7%
<b>No. of Trade</b>		138,739	148,323	-6.5%

\* Average Interbank Exchange Rate is BDT 121.84 as of Oct 20, 2025

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Figure: Sectorial Turnover (BDT Mn)

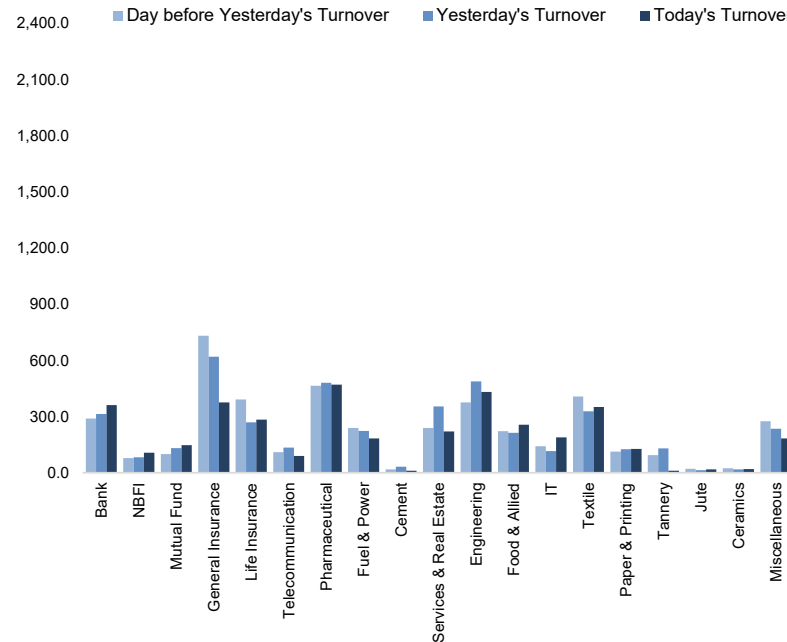
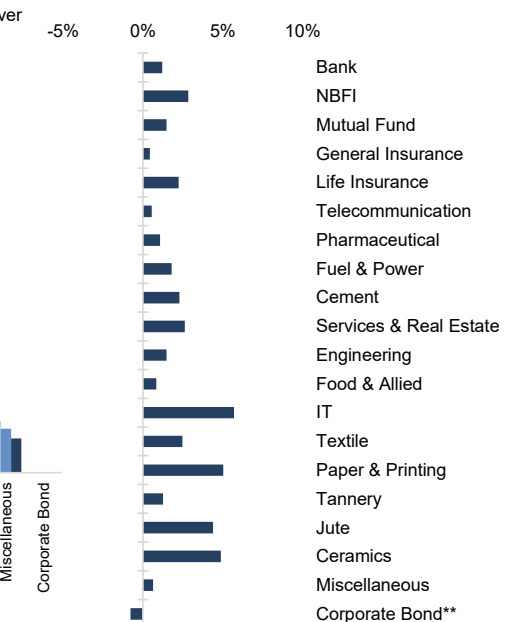


Figure: Sectorial Mcap Change



Market PE 15.7x  
Market PB 1.2x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFi, ABBANK, IFIC, FIRSSTBANK, 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	1,409	1,392	+16.84	+1.21%	36	666,498	9.5%	360.4	9.4%	NM	0.8x	GP	387,941	11.2%	7.1	13.2x	6.8x
NBFI	1,005	977	+27.79	+2.85%	23	95,727	1.4%	106.9	2.8%	NM	NM	SQURPHARMA	189,523	5.5%	99.8	8.1x	1.4x
Mutual Fund	540	532	+7.91	+1.49%	37	25,894	0.4%	147.2	3.8%	NM	0.5x	ROBI	152,948	4.4%	74.6	17.6x	2.4x
General Insurance	2,992	2,979	+12.94	+0.43%	43	85,391	1.2%	374.9	9.8%	14.4x	1.3x	BATBC	139,266	4.0%	31.6	11.2x	2.6x
Life Insurance	2,005	1,961	+43.93	+2.24%	15	53,327	0.8%	282.9	7.4%	NM	NM	BRACBANK	134,188	3.9%	50.2	9.5x	1.6x
Telecommunication	4,826	4,799	+26.71	+0.56%	3	565,896	8.0%	89.5	2.3%	14.2x	4.1x	WALTONHIL	129,323	3.7%	5.7	12.5x	1.1x
Pharmaceutical	2,954	2,923	+31.65	+1.08%	34	560,125	8.0%	470.5	12.3%	12.9x	1.6x	BEXIMCO	103,850	3.0%	0.3	NM	1.3x
Fuel & Power	1,109	1,089	+19.59	+1.80%	23	293,783	4.2%	182.8	4.8%	24.2x	0.6x	MARICO	87,835	2.5%	1.3	14.3x	26.3x
Cement	1,915	1,872	+42.95	+2.29%	7	91,238	1.3%	10.7	0.3%	20.9x	2.0x	UPGDCL	83,824	2.4%	6.0	7.2x	2.0x
Services & Real Estate	984	959	+25.25	+2.63%	9	54,108	0.8%	221.0	5.8%	23.9x	0.4x	BERGERPBL	69,564	2.0%	1.6	19.8x	4.0x
Engineering	2,402	2,367	+34.95	+1.48%	42	270,988	3.9%	430.9	11.2%	13.2x	0.8x	LHB	59,578	1.7%	5.6	15.9x	3.1x
Food & Allied	13,612	13,499	+112.70	+0.83%	21	249,058	3.5%	256.7	6.7%	18.9x	3.9x	RENATA	51,728	1.5%	8.1	18.4x	1.5x
IT	1,851	1,751	+99.90	+5.70%	11	24,417	0.3%	188.8	4.9%	20.5x	1.5x	BXPHARMA	49,295	1.4%	26.2	7.7x	1.0x
Textile	1,112	1,085	+26.85	+2.47%	58	115,781	1.6%	351.3	9.2%	NM	0.8x	UNILEVERCL	45,989	1.3%	0.2	72.4x	25.2x
Paper & Printing	4,823	4,592	+231.11	+5.03%	6	21,789	0.3%	126.6	3.3%	NM	1.0x	ICB	40,501	1.2%	3.7	NM	1.0x
Tannery	2,010	1,985	+24.97	+1.26%	6	22,396	0.3%	11.4	0.3%	NM	1.7x	DUTCHBANGL	37,315	1.1%	2.6	9.9x	0.7x
Jute	11,844	11,346	+498.04	+4.39%	3	2,607	0.0%	18.2	0.5%	NM	NM	EBL	36,385	1.1%	16.8	5.2x	0.8x
Ceramics	380	362	+17.67	+4.88%	5	17,048	0.2%	19.1	0.5%	NM	1.1x	CITYBANK	36,357	1.1%	35.2	3.3x	0.7x
Miscellaneous	4,017	3,991	+25.57	+0.64%	15	218,115	3.1%	183.7	4.8%	86.6x	1.7x	PUBALIBANK	35,659	1.0%	1.6	4.9x	0.6x
Corporate Bond**	16,645	16,776	-130.90	-0.78%	16	36,749	0.5%	0.3	0.0%	NM	NM	PRIMEBANK	31,336	0.9%	4.6	3.7x	0.8x
Treasury Bond**	2,349	2,271	+78.20	+3.44%	233	3,565,920	50.7%	2.7	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
MONNOFABR	16.5	+10.0%	18.4	NM	0.6x	SQURPHARMA	108,958	7.7%	8.1x	1.4x	DOMINAGE	23.0	+4.1%	242.6	NM	1.3x
FIRSTFIN	2.2	+10.0%	0.1	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.9x	ORIONINFU	491.4	+1.4%	163.5	NM	31.3x
SAMATALETH	84.9	+10.0%	3.2	NM	5.9x	BEXIMCO	69,463	4.9%	NM	1.3x	SAPORTL	42.9	+5.7%	158.0	15.9x	1.2x
ISNLTD	85.0	+10.0%	32.9	NM	30.9x	BATBC	50,233	3.6%	11.2x	2.6x	RUPALILIFE	103.9	+6.7%	101.1	NM	NM
INTECH	28.7	+9.5%	29.8	NM	NM	WALTONHIL	46,773	3.3%	12.5x	1.1x	SQURPHARMA	213.8	+0.2%	99.8	8.1x	1.4x
EGEN	23.1	+9.48%	41.4	28.9x	1.0x	BRACBANK	46,489	3.3%	9.5x	1.6x	SIMTEX	29.6	+3.1%	96.0	30.5x	1.3x
IBP	11.8	+9.3%	8.5	NM	1x	GP	44,708	3.2%	13.2x	6.8x	KBPPWBIL	103.3	+1.0%	94.5	NM	8.6x
NTC	165.9	+9.1%	0.5	NM	NM	RENATA	32,968	2.3%	18.4x	1.5x	PRAGATILIF	259.7	+2.9%	93.8	NM	NM
ILFSL	1.2	+9.1%	0.5	NM	NM	BXPHARMA	23,409	1.7%	7.7x	1.0x	MIDLANDBNK	21.8	+3.3%	84.5	22.4x	1.5x
KTL	10.9	+9.0%	6.4	NM	0.7x	PUBALIBANK	22,905	1.6%	4.9x	0.6x	PRAGATIINS	73.5	+0.1%	83.6	13.3x	1.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	OLYMPIC	ALARABANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FASFIN	1.1	-8.3%	0.3	NM	NM	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	GQBALLPEN	502.0	502.0	1.0	61	30.62
NURANI	2.1	-4.5%	0.2	NM	0x	15.9x	15.8x	20,496	17,838	16,142	14,876	13,699	13,055	12,852	FINEFOODS	300.0	290.0	4.0	80	23.19
RSRMSTEEL	7.2	-4.0%	0.4	NM	0.2x	34.1x	34.1x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	DOMINAGE	21.5	21.0	3.0	766	16.42
VAMLBDMF1	7.4	-3.9%	1.1	NM	0.7x	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	ORIONINFU	465.0	455.1	4.0	31	14.03
SEMILLECMF	7.5	-3.8%	10.8	NM	0.8x	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	FIRSTSBANK	3.0	3.0	2.0	1,780	5.34
ICBIBANK	2.6	-3.7%	0.3	NM	NM	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	FEKDIL	18.0	18.0	1.0	200	3.60
BIFC	2.7	-3.6%	0.1	NM	NM	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	MONNOCERA	70.1	67.5	4.0	50	3.41
FIRSTSBANK	2.7	-3.6%	8.8	NM	1.1x	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	CITYGENINS	69.8	68.9	2.0	37	2.54
MITHUNKNIT	12.9	-3.0%	0.6	NM	4.1x	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	SAPORTL	44.6	44.6	1.0	35	1.56
FAREASTLIF	24.3	-2.8%	0.5	NM	NM	15.8x	15.8x	18,282	17,838	16,142	14,876	13,699	13,055	12,852	HAKKANIPUL	60.1	59.8	2.0	19	1.14

\* 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
GQBALLPEN	502.0	502.0	30.6	61	1
FINEFOODS	300.0	290.0	23.2	80	4
DOMINAGE	21.5	21.0	16.4	766	3
ORIONINFU	465.0	455.1	14.0	31	4
FIRSTSBANK	3.0	3.0	5.3	1,780	2
FEKDIL	18.0	18.0	3.6	200	1
MONNOCERA	70.1	67.5	3.4	50	4
CITYGENINS	69.8	68.9	2.5	37	2
SAPORTL	44.6	44.6	1.6	35	1
HAKKANIPUL	60.1	59.8	1.1	19	2
MIRAKHTER	30.3	30.0	1.1	37	2
LOVELLO	87.0	87.0	1.1	13	1
BEXIMCO	99.6	99.1	1.0	10	2
SIMTEX	28.7	27.5	1.0	36	2
DOREENPWR	24.3	24.3	0.7	29	1
KAY&QUE	396.0	396.0	0.6	2	1
MBL1STMF	4.2	4.2	0.6	137	1
BEACONPHAR	111.5	111.5	0.6	5	1
KBPPWBIL	111.0	111.0	0.6	5	1
ASIATICLAB	59.0	59.0	0.5	9	1
EIL	31.5	31.5	0.5	16	1
<b>Total</b>			<b>110.1</b>		<b>38</b>

**Important DSE News**

**CROWNCEMNT**

The Board of Directors has recommended 21% Cash Dividend for the year ended June 30, 2025. Date of AGM: 22.12.2025, Time: 3:00 PM, Venue: Digital Platform. Record Date: 16.11.2025. The Company has also reported EPS of Tk. 4.52, NAV per share of Tk. 62.66 and NOCFPS of Tk. 25.99 for the year ended June 30, 2025 as against Tk. 6.74, Tk. 56.99 and Tk. 8.71 respectively for the year ended June 30, 2024. NOCFPS increased by 198.35% (Tk. 25.99 from Tk. 8.71 per share), primarily due to the impact of additional depreciation charges related to the new 6th Unit, a non-cash expense, along with efficient working capital management achieved through higher credit availed from suppliers and reduced credit periods extended to customers during the period.

**DBH**

**(Q3 Un-audited):** EPS was Tk. 1.60 for July-September, 2025 as against Tk. 1.64 (restated) for July-September, 2024; EPS was Tk. 3.67 for January-September, 2025 as against Tk. 3.65 (restated) for January-September, 2024. NOCFPS was Tk. 17.36 for January-September, 2025 as against Tk. (7.31) (restated) for January-September, 2024. NAV per share was Tk. 48.52 as on September 30, 2025 and Tk. 46.33 (restated) as on December 31, 2024. Reasons for deviation in NOCFPS: During the reporting period, strong growth in deposits, loans, and business performance drove a net cash inflow of about BDT 244 crore, boosting NOCFPS from BDT (7.31) to BDT 17.36.

**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
DULAMIACOT		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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