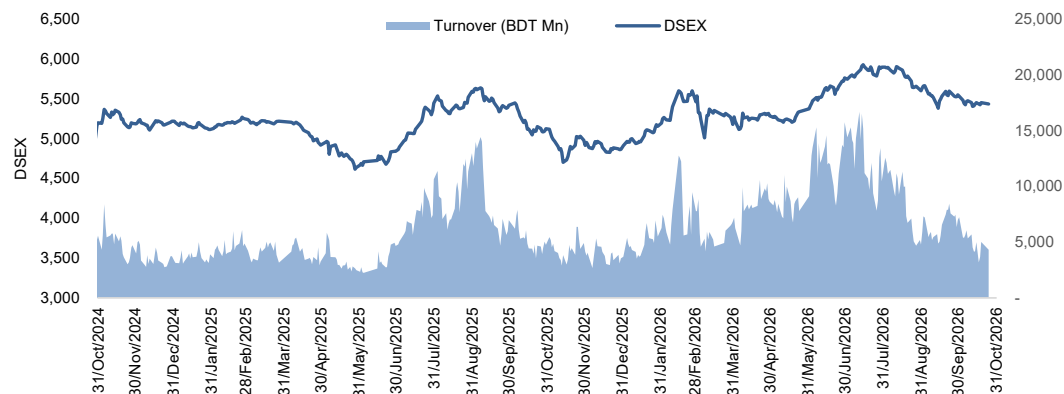


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.33%) lost 18.08 points and closed at 5,432.55. The blue-chip index DS30 (-0.08%), the Shariah-based index DSES (-0.91%), and the large-cap index CDSET (+0.13%) closed at 2,101.73, 1,060.69, and 1,108.09 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.42% followed by Engineering (-1.01%), Fuel & Power (-0.91%), Food & Allied (-0.68%), Pharmaceutical (-0.45%), Telecommunication (+0.14%), and Bank (+0.99%), respectively. Block trades contributed 2.2% of the overall market turnover. BRAC Bank Ltd. (+0.3%) was the most traded share with a turnover of BDT 321 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,432.55	5,450.63	-18.08	-0.33%	+11.7%
DS30	2,101.73	2,103.40	-1.67	-0.08%	+13.4%
DSES	1,060.69	1,070.40	-9.71	-0.91%	+6.0%
CDSET	1,108.09	1,106.64	+1.45	+0.13%	+10.3%

	Advanced	Declined	Unchanged	Total
All Category	64	283	38	385
A Category (Equity)	32	145	15	192
B Category (Equity)	6	64	2	72
N Category (Equity)	0	0	1	1
Z Category (Equity)	26	74	20	120
Mutual Funds	2	22	7	31
Corporate Bonds	2	1	1	4
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,788,708	6,815,877	-0.4%
	Mn USD	54,875	55,095	
Turnover	Mn BDT	4,307	5,026	-14.3%
	Mn USD	35	41	
Volume	Mn Shares	150	178	-15.8%
No. of Trade		146,761	145,568	+0.8%

* Average Interbank Exchange Rate is BDT 123.71 as of Oct 25, 2026

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Figure: Sectorial Turnover (BDT Mn)

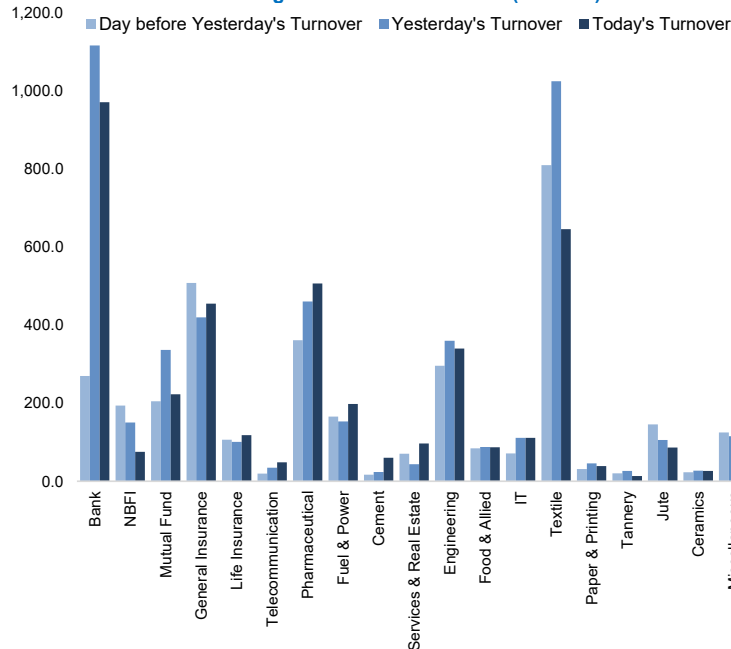
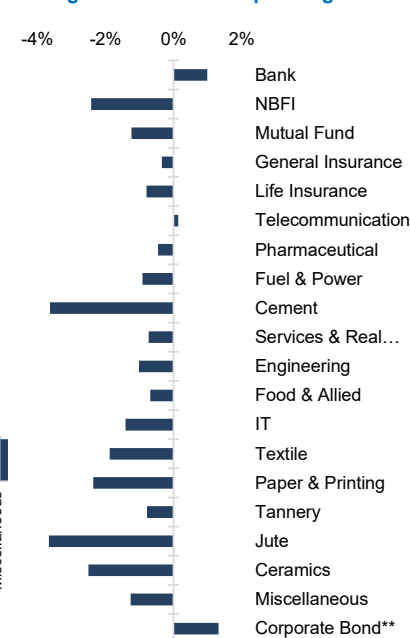


Figure: Sectorial Mcap Change



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	1,574	1,558	+15.43	+0.99%	36	750,078	11.0%	971.6	23.1%	7.4x	0.8x	GP	321,506	9.4%	14.2	9.1x	5.7x
NBFI	998	1,023	-24.75	-2.42%	23	94,913	1.4%	75.7	1.8%	NM	1.0x	SQURPHARMA	194,044	5.7%	78.3	7.5x	1.3x
Mutual Fund	647	655	-8.10	-1.24%	35	29,280	0.4%	222.9	5.3%	NM	0.6x	ROBI	157,138	4.6%	32.2	15.0x	2.4x
General Insurance	4,259	4,273	-14.42	-0.34%	43	120,333	1.8%	455.4	10.8%	17.3x	1.6x	BRACBANK	155,690	4.5%	320.7	6.9x	1.4x
Life Insurance	1,667	1,680	-13.31	-0.79%	15	46,978	0.7%	118.3	2.8%	NM	NM	WALTONHIL	120,666	3.5%	3.6	10.7x	0.9x
Telecommunication	4,356	4,350	+6.15	+0.14%	3	505,428	7.4%	48.7	1.2%	10.5x	3.6x	BATBC	117,342	3.4%	10.2	20.2x	2.0x
Pharmaceutical	3,031	3,045	-13.78	-0.45%	34	572,214	8.4%	507.1	12.0%	10.2x	1.4x	MARICO	83,661	2.4%	12.2	7.4x	18.2x
Fuel & Power	1,085	1,095	-9.97	-0.91%	23	286,353	4.2%	197.8	4.7%	9.1x	0.6x	BERGERPBL	71,258	2.1%	3.8	15.3x	3.3x
Cement	1,862	1,932	-70.07	-3.63%	7	87,601	1.3%	60.4	1.4%	23.4x	1.9x	UPGDCL	65,448	1.9%	2.4	7.0x	1.4x
Services & Real Estate	1,057	1,065	-7.74	-0.73%	9	57,520	0.8%	96.6	2.3%	25.5x	0.4x	BXPHARMA	65,132	1.9%	80.7	7.5x	1.1x
Engineering	2,471	2,496	-25.20	-1.01%	42	277,001	4.1%	339.8	8.1%	13.1x	0.8x	LHB	57,604	1.7%	53.1	13.2x	3.0x
Food & Allied	11,770	11,851	-81.05	-0.68%	21	214,866	3.2%	87.1	2.1%	30.6x	3.1x	CITYBANK	53,007	1.5%	153.9	3.5x	0.8x
IT	2,172	2,203	-30.94	-1.40%	11	28,758	0.4%	110.9	2.6%	49.1x	1.8x	RENATA	51,189	1.5%	6.6	14.1x	1.4x
Textile	1,304	1,329	-24.86	-1.87%	58	135,640	2.0%	646.5	15.3%	NM	0.9x	DUTCHBANGL	47,402	1.4%	25.2	3.6x	0.8x
Paper & Printing	4,277	4,380	-103.02	-2.35%	6	20,033	0.3%	39.1	0.9%	NM	1.3x	EBL	39,613	1.2%	66.6	4.4x	0.8x
Tannery	1,972	1,988	-15.37	-0.77%	6	22,903	0.3%	13.1	0.3%	NM	1.4x	ISLAMIBANK	38,318	1.1%	1.7	NM	0.7x
Jute	13,287	13,791	-504.51	-3.66%	3	2,898	0.0%	86.4	2.0%	NM	1.8x	UNILEVERCL	38,219	1.1%	0.3	62.4x	23.4x
Ceramics	409	419	-10.47	-2.50%	5	18,472	0.3%	26.1	0.6%	NM	1.2x	PRIMEBANK	37,168	1.1%	103.7	4.0x	0.8x
Miscellaneous	2,386	2,417	-30.40	-1.26%	15	129,589	1.9%	107.6	2.6%	36.6x	1.0x	POWERGRID	35,090	1.0%	4.4	8.7x	0.3x
Corporate Bond**	19,153	18,902	+251.18	+1.33%	16	42,361	0.6%	1.8	0.0%	NM	NM	BSRMSTEEL	33,949	1.0%	37.6	4.7x	0.8x
Treasury Bond**	2,182	2,191	-8.65	-0.39%	231	3,349,843	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
BNIPLC	168.3	+9.3%	49.0	29.2x	4.9x	SQURPHARMA	108,374	7.6%	7.5x	1.3x	BRACBANK	68.0	+0.3%	320.7	6.9x	1.4x
CAPMIBBLMF	16.3	+8.7%	15.6	NM	2.0x	BRACBANK	83,808	5.9%	6.9x	1.4x	CITYBANK	30.3	+2.4%	153.9	3.5x	0.8x
PRIMEFIN	2.7	+8.0%	1.2	NM	NM	BXPHARMA	45,508	3.2%	7.5x	1.1x	MATINSPINN	81.1	+3.6%	117.2	12.8x	1.1x
LIBRAINFU	539.9	+7.5%	1.9	NM	0.6x	PUBALIBANK	42,879	3.0%	5.3x	0.8x	PRIMEBANK	30.5	+3.4%	103.7	4.0x	0.8x
PLFSL	1.7	+6.2%	2.8	NM	NM	ISLAMIBANK	38,249	2.7%	NM	0.7x	ASIATICLAB	109.3	-0.8%	102.9	25.1x	1.9x
ISLAMICFIN	10.7	+5.94%	2.1	NM	7.3x	CITYBANK	36,909	2.6%	3.5x	0.8x	SONALIANSH	215.9	-4.6%	86.1	59.8x	0.9x
PREMIERLEA	1.8	+5.9%	0.6	NM	NM	WALTONHIL	34,885	2.4%	10.7x	0.9x	BXPHARMA	146.0	+0.2%	80.7	7.5x	1.1x
MIDLANDBNK	17.5	+5.4%	45.7	11.9x	1.1x	GP	32,151	2.2%	9.1x	5.7x	SQURPHARMA	218.9	-0.3%	78.3	7.5x	1.3x
ALARABANK	15.9	+5.3%	1.8	20.4x	0.7x	BATBC	31,037	2.2%	20.2x	2.0x	EBL	24.1	+2.6%	66.6	4.4x	0.8x
UCB	8.6	+4.9%	1.3	3.9x	0.5x	EBL	27,951	2.0%	4.4x	0.8x	FARCHEM	16.4	+2.5%	63.4	NM	0.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	24,934	1.7%	14.1x	1.4x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DSHGARME	115.2	-8.9%	10.4	NM	0.7x	PRIMEBANK	23,958	1.7%	4.0x	0.8x	MTB	14.3	13.1	10.0	1,335	17.65
METROSPIN	8.1	-8.0%	1.1	NM	2x	LHB	21,509	1.5%	13.2x	3.0x	CAPMIBBLMF	15.6	14.4	8.0	1,056	15.65
BBS	9.5	-7.4%	7.7	NM	0.8x	UTTARABANK	17,913	1.3%	NM	0.7x	GQBALLPEN	583.3	570.0	3.0	12	7.06
SHEPHERD	10.0	-7.4%	7.7	NM	0.8x	UCB	17,784	1.2%	3.9x	0.5x	DAFODILCOM	157.2	155.2	7.0	45	7.02
USMANIAGL	50.4	-6.5%	1.4	NM	0.8x	OLYMPIC	16,940	1.2%	13.5x	2.0x	MARICO	2,650.0	2,650.0	5.0	3	6.63
SAIHAMTEX	44.6	-6.3%	53.7	71.9x	1.0x	ROBI	15,714	1.1%	15.0x	2.4x	ASIATICLAB	114.0	104.0	3.0	60	6.44
CVOPRL	150.9	-6.2%	39.5	30.6x	4.8x	BSRMLTD	14,889	1.0%	4.0x	0.5x	BSRMLTD	99.9	99.9	1.0	45	4.50
ISNLTD	44.4	-5.9%	8.5	NM	20.7x	JAMUNABANK	14,030	1.0%	3.6x	0.8x	SHASHADNIM	26.1	26.0	3.0	169	4.40
ANLIMAYARN	29.6	-5.7%	0.5	NM	10.5x	BEACONPHAR	13,087	0.9%	11.2x	2.6x	IPDC	28.0	28.0	1.0	146	4.09
QUEENSOUTH	11.8	-5.6%	8.4	NM	0.7x						BERGERPBL	1,446.0	1,446.0	1.0	3	4.05
* 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																

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 ** 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
MTB	14.3	13.1	17.6	1,335	10
CAPMIBLMF	15.6	14.4	15.6	1,056	8
GQBALLPEN	583.3	570.0	7.1	12	3
DAFODILCOM	157.2	155.2	7.0	45	7
MARICO	2,650.0	2,650.0	6.6	3	5
ASIATICLAB	114.0	104.0	6.4	60	3
BSRMLTD	99.9	99.9	4.5	45	1
SHASHADNIM	26.1	26.0	4.4	169	3
IPDC	28.0	28.0	4.1	146	1
BERGERPBL	1,446.0	1,446.0	4.0	3	1
UNITEDFIN	17.6	17.3	2.7	156	5
CITYBANK	26.7	26.7	2.7	100	1
BDLAMPS	242.0	242.0	2.0	8	1
PRIME1ICBA	7.0	7.0	1.5	220	1
GLOBALINS	43.4	43.4	1.3	30	1
PTL	84.9	83.9	1.0	12	2
DUTCHBANGL	45.3	45.3	0.9	21	1
AAMRANET	19.9	19.9	0.9	43	1
MALEKSPIN	47.5	47.5	0.7	14	1
DSHGARME	122.0	122.0	0.6	5	1
PARAMOUNT	70.5	70.5	0.6	9	1
ICICL	33.0	33.0	0.6	18	1
Total			94.1		61

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
LHB		0.0%	10.0%	Record Date	12-Nov-26

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Important DSE News

SAMORITA

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2026. Date of AGM: 27.12.2026, Time: 11:00 AM, Venue: To be notified later. Record Date: 17.11.2026. The Company has also reported EPS of Tk. 1.12, NAV per share of Tk. 48.74 and NOCFPS of Tk. 2.49 for the year ended June 30, 2026 as against EPS of Tk. 0.62, NAV per share of Tk. 48.39 and NOCFPS of Tk. 1.72 for the year ended June 30, 2025.

(Q1 Un-audited): EPS was Tk. 0.83 for July-September 2026 as against Tk. 0.69 for July-September 2025. NOCFPS was Tk. 1.62 for July-September 2026 as against Tk. 1.61 for July-September 2025. NAV per share was Tk. 49.57 as on September 30, 2026 and Tk. 48.74 as on June 30, 2026.

PHENIXINS

(Q3 Un-audited): EPS was Tk. 0.60 for July-September 2026 as against Tk. 0.93 for July-September 2025; EPS was Tk. 2.05 for January-September 2026 as against Tk. 1.61 for January-September 2025. NOCFPS was Tk. 1.99 for January-September 2026 as against Tk. 0.77 for January-September 2025. NAV per share was Tk. 37.01 as on September 30, 2026 and Tk. 33.95 as on September 30, 2025.

CVOPRL

The Board of Directors has recommended 15% Cash Dividend for the year ended 30-Jun-2026. Date of AGM: 14-Dec-2026, Time: 11:00 AM, AGM Mode: Hybrid Platform, AGM Venue: The King of Chittagong, Panchlaish, Chittagong. Record Date: 17-Nov-2026. The Company has also reported EPS of Tk. 4.93, NAV per share of Tk. 31.75 and NOCFPS of Tk. 4.52 for the year ended 30-Jun-2026 as against EPS of Tk. 3.50 (Restated), NAV per share of Tk. 27.79 and NOCFPS of Tk. 7.01 for the year ended 30-Jun-2025.

LHB

The company has informed that the Board of Directors has declared Interim Cash Dividend @10% (i.e. Tk.1.00 per share of Tk.10.00 each) for the year ending on December 31, 2026, out of the provisional net profits of the Company for the period ended on September 30, 2026. The Record Date for Interim Cash Dividend is 12.11.2026.

(Q3 Un-audited): Consolidated EPS was Tk. 0.54 for July-September 2026 as against Tk. 1.02 for July-September 2025; Consolidated EPS was Tk. 2.41 for January-September 2026 as against Tk. 3.06 for January-September 2025. Consolidated NOCFPS was Tk. (2.50) for January-September 2026 as against Tk. 0.73 for January-September 2025. Consolidated NAV per share was Tk. 16.45 as on September 30, 2026 and Tk. 16.41 as on December 31, 2025.

BGIC

(Q3 Un-audited): EPS was Tk. 0.50 for July-September 2026 as against Tk. 0.50 for July-September 2025; EPS was Tk. 1.74 for January-September 2026 as against Tk. 1.73 for January-September 2025. NOCFPS was Tk. 1.98 for January-September 2026 as against Tk. 1.80 for January-September 2025. NAV per share was Tk. 21.19 as on September 30, 2026 and Tk. 20.03 as on September 30, 2025.

PIONEERINS

(Q3 Un-audited): Basic EPS was Tk. 1.19 for July-September 2026 as against Tk. 0.90 (Diluted) for July-September 2025; Basic EPS was Tk. 4.19 for January-September 2026 as against Tk. 3.00 (Diluted) for January-September 2025. Basic NOCFPS was Tk. 3.16 for January-September 2026 as against Tk. 1.04 (Diluted) for January-September 2025. Basic NAV per share was Tk. 48.28 as on September 30, 2026 and Tk. 44.73 (Diluted) as on December 31, 2025.