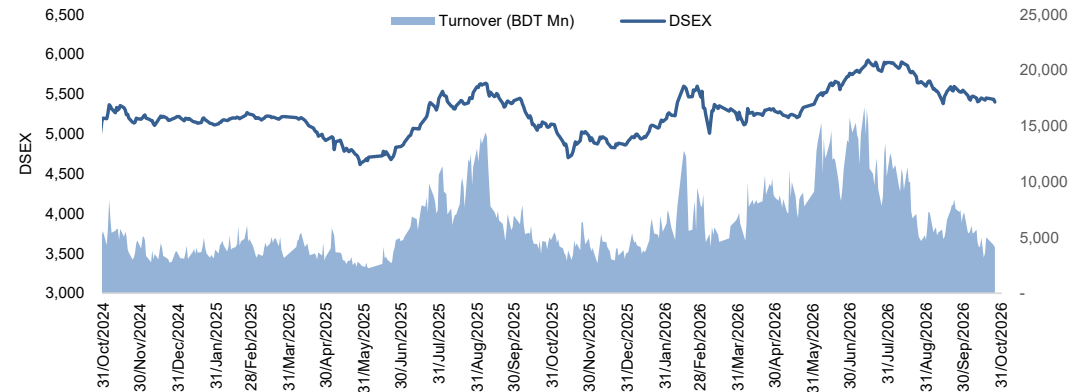


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.61%) lost 33.01 points and closed at 5,399.54. The blue-chip index DS30 (-0.52%), the Shariah-based index DSES (-0.68%), and the large-cap index CDSET (-0.45%) closed at 2,090.75, 1,053.44, and 1,103.50 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.78% followed by Telecommunication (-0.31%), Engineering (-0.27%), Food & Allied (-0.27%), NBFI (-0.22%), Pharmaceutical (-0.21%), and Fuel & Power (-0.17%), respectively. Block trades contributed 7.2% of the overall market turnover. Prime Bank Ltd. (-0.7%) was the most traded share with a turnover of BDT 185 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,399.54	5,432.55	-33.01	-0.61%	+11.0%
DS30	2,090.75	2,101.73	-10.99	-0.52%	+12.8%
DSES	1,053.44	1,060.69	-7.25	-0.68%	+5.3%
CDSET	1,103.50	1,108.48	-4.98	-0.45%	+9.8%

	Advanced	Declined	Unchanged	Total
All Category	74	252	58	384
A Category (Equity)	31	139	21	191
B Category (Equity)	13	52	7	72
N Category (Equity)	0	1	0	1
Z Category (Equity)	30	60	30	120
Mutual Funds	2	18	11	31
Corporate Bonds	1	2	0	3
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,763,026	6,788,708	-0.4%
	Mn USD	54,637	54,845	
Turnover	Mn BDT	4,106	4,307	-4.7%
	Mn USD	33	35	
Volume	Mn Shares	141	150	-6.0%
No. of Trade		133,552	146,761	-9.0%

* Average Interbank Exchange Rate is BDT 123.78 as of Oct 26, 2026

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Figure: Sectorial Turnover (BDT Mn)

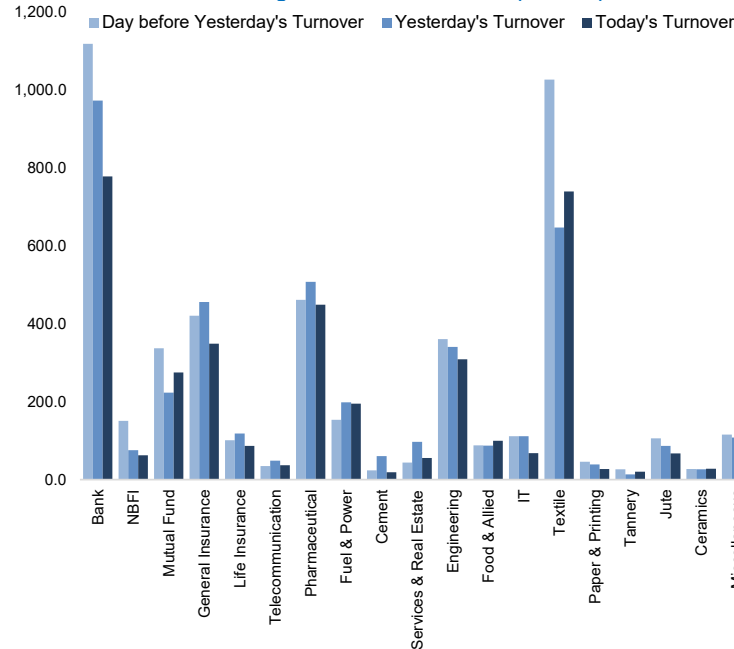
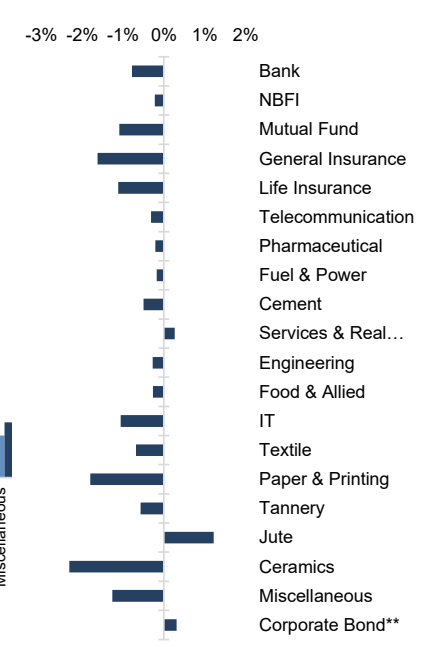


Figure: Sectorial Mcap Change



Market PE 12.5x

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	1,562	1,574	-12.30	-0.78%	36	744,214	11.0%	777.3	20.4%	7.3x	0.7x	GP	320,966	9.4%	10.1	9.1x	5.7x
NBFI	996	998	-2.20	-0.22%	23	94,704	1.4%	62.2	1.6%	NM	1.0x	SQURPHARMA	193,955	5.7%	53.2	7.5x	1.3x
Mutual Fund	640	647	-7.05	-1.09%	35	28,962	0.4%	274.4	7.2%	NM	0.5x	ROBI	156,090	4.6%	25.7	14.9x	2.4x
General Insurance	4,190	4,259	-69.17	-1.62%	43	118,378	1.7%	348.3	9.1%	17.0x	1.6x	BRACBANK	154,317	4.5%	180.4	6.8x	1.4x
Life Insurance	1,648	1,667	-18.59	-1.12%	15	46,454	0.7%	86.3	2.3%	NM	NM	WALTONHIL	120,409	3.5%	5.7	10.7x	0.9x
Telecommunication	4,342	4,356	-13.52	-0.31%	3	503,859	7.4%	37.0	1.0%	10.4x	3.6x	BATBC	117,342	3.4%	9.9	20.2x	2.0x
Pharmaceutical	3,025	3,031	-6.22	-0.21%	34	571,041	8.4%	448.5	11.8%	10.1x	1.4x	MARICO	83,396	2.4%	4.4	7.4x	18.1x
Fuel & Power	1,083	1,085	-1.89	-0.17%	23	285,855	4.2%	194.6	5.1%	9.1x	0.6x	BERGERPBL	70,521	2.1%	8.9	15.1x	3.3x
Cement	1,853	1,862	-9.28	-0.50%	7	87,165	1.3%	19.0	0.5%	23.3x	1.9x	UPGDCL	65,448	1.9%	1.7	7.0x	1.4x
Services & Real Estate	1,060	1,057	+2.81	+0.27%	9	57,672	0.9%	55.3	1.5%	25.6x	0.4x	BXPHARMA	64,508	1.9%	83.2	7.5x	1.1x
Engineering	2,464	2,471	-6.79	-0.27%	42	276,240	4.1%	308.2	8.1%	13.0x	0.8x	LHB	57,256	1.7%	11.7	13.1x	3.0x
Food & Allied	11,738	11,770	-31.74	-0.27%	21	214,286	3.2%	99.9	2.6%	30.5x	3.1x	CITYBANK	52,307	1.5%	126.5	3.4x	0.8x
IT	2,149	2,172	-23.00	-1.06%	11	28,454	0.4%	67.8	1.8%	48.6x	1.8x	RENATA	50,902	1.5%	7.8	14.0x	1.3x
Textile	1,295	1,304	-8.90	-0.68%	58	134,715	2.0%	738.5	19.4%	NM	0.9x	DUTCHBANGL	47,301	1.4%	12.1	3.6x	0.8x
Paper & Printing	4,200	4,277	-76.92	-1.80%	6	19,672	0.3%	26.8	0.7%	NM	1.3x	EBL	39,284	1.2%	15.4	4.4x	0.8x
Tannery	1,961	1,972	-11.19	-0.57%	6	22,773	0.3%	20.2	0.5%	NM	1.4x	UNILEVERCL	38,219	1.1%	0.2	62.4x	23.4x
Jute	13,449	13,287	+161.93	+1.22%	3	2,933	0.0%	66.8	1.8%	NM	1.8x	ISLAMIBANK	37,513	1.1%	2.1	NM	0.6x
Ceramics	399	409	-9.46	-2.32%	5	18,044	0.3%	27.9	0.7%	NM	1.2x	PRIMEBANK	36,924	1.1%	184.8	4.0x	0.8x
Miscellaneous	2,356	2,386	-30.13	-1.26%	15	127,952	1.9%	141.8	3.7%	35.7x	1.0x	POWERGRID	35,090	1.0%	1.2	8.7x	0.3x
Corporate Bond**	19,213	19,153	+60.16	+0.31%	16	42,494	0.6%	5.1	0.1%	NM	NM	BSRMSTEEL	34,136	1.0%	20.4	4.8x	0.9x
Treasury Bond**	2,177	2,182	-5.46	-0.25%	231	3,341,463	49.4%	5.6	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
SAIFPOWER	6.4	+8.5%	1.8	18.3x	0.4x	SQURPHARMA	108,324	7.6%	7.5x	1.3x	PRIMEBANK	30.3	-0.7%	184.8	4.0x	0.8x
KPCL	10.5	+8.2%	9.0	11.7x	0.5x	BRACBANK	83,069	5.8%	6.8x	1.4x	BRACBANK	67.4	-0.9%	180.4	6.8x	1.4x
ARAMITCEM	11.2	+7.7%	0.0	NM	NM	BXPHARMA	45,072	3.2%	7.5x	1.1x	SAIHAMTEX	47.1	+5.6%	157.5	76.0x	1.1x
LIBRAINFU	580.3	+7.5%	2.1	NM	0.7x	PUBALIBANK	42,879	3.0%	5.3x	0.8x	CITYBANK	29.9	-1.3%	126.5	3.4x	0.8x
MITHUNKNIT	13.0	+7.4%	0.2	NM	4.1x	ISLAMIBANK	37,445	2.6%	NM	0.6x	ANWARGALV	120.2	+3.4%	101.3	NM	22.4x
JMISMDL	123.5	+6.56%	0.5	NM	1.5x	CITYBANK	36,422	2.6%	3.4x	0.8x	MATINSPINN	81.8	+0.9%	91.0	12.9x	1.2x
MIRACLEIND	28.1	+5.6%	29.3	NM	1x	WALTONHIL	34,810	2.4%	10.7x	0.9x	ORIONPHARM	29.1	+3.2%	87.0	NM	0.3x
SAIHAMTEX	47.1	+5.6%	157.5	76.0x	1.1x	GP	32,097	2.3%	9.1x	5.7x	1STPRIMFMF	32.2	+5.2%	83.7	NM	3.3x
PREMIERLEA	1.9	+5.6%	2.1	NM	NM	BATBC	31,037	2.2%	20.2x	2.0x	BXPHARMA	144.6	-1.0%	83.2	7.5x	1.1x
DSHGARME	121.4	+5.4%	8.3	NM	0.8x	EBL	27,719	1.9%	4.4x	0.8x	MALEKSPIN	43.0	-5.5%	72.0	7.6x	0.7x
						RENATA	24,795	1.7%	14.0x	1.3x						
						PRIMEBANK	23,801	1.7%	4.0x	0.8x						
						LHB	21,379	1.5%	13.1x	3.0x						
						UTTARABANK	17,913	1.3%	NM	0.7x						
						UCB	17,577	1.2%	3.9x	0.5x						
						OLYMPIC	16,777	1.2%	13.4x	1.9x						
						ROBI	15,609	1.1%	14.9x	2.4x						
						BSRMLTD	15,142	1.1%	4.1x	0.5x						
						JAMUNABANK	13,852	1.0%	3.5x	0.8x						
						BEACONPHAR	12,934	0.9%	11.1x	2.6x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PLFSL	1.6	-5.9%	1.2	NM	NM						GREENDELT	59.0	59.0	2.0	2,028	119.65
FUWANGFOOD	8.1	-5.8%	3.0	NM	4x						PUBALIBANK	40.2	40.2	2.0	1,000	40.20
BIFC	3.3	-5.5%	18.3	NM	1.7x						SAIHAMTEX	45.6	44.0	4.0	856	38.23
INTRACO	22.3	-5.5%	18.3	NM	1.7x						BRACBANK	67.3	67.3	1.0	500	33.65
MALEKSPIN	43.0	-5.5%	72.0	7.6x	0.7x						ORIONPHARM	28.0	28.0	1.0	251	7.03
ANLIMAYARN	28.0	-5.4%	0.3	NM	9.9x						SIPLC	130.1	130.0	2.0	53	6.89
FAREASTLIF	15.9	-5.4%	0.3	NM	NM						MARICO	2,650.0	2,650.0	2.0	3	6.63
IBP	11.6	-4.9%	8.2	NM	0.9x						GQBALLPEN	570.0	570.0	2.0	11	6.14
FARCHEM	15.6	-4.9%	21.9	NM	0.5x						JAMUNABANK	23.6	23.5	2.0	160	3.77
CVOPRL	143.7	-4.8%	34.6	29.1x	4.5x						MTB	13.5	13.5	1.0	268	3.62

* 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

* 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
GREENDELT	59.0	59.0	119.7	2,028	2
PUBALIBANK	40.2	40.2	40.2	1,000	2
SAIHAMTEX	45.6	44.0	38.2	856	4
BRACBANK	67.3	67.3	33.7	500	1
ORIONPHARM	28.0	28.0	7.0	251	1
SIPLC	130.1	130.0	6.9	53	2
MARICO	2,650.0	2,650.0	6.6	3	2
GQBALLPEN	570.0	570.0	6.1	11	2
JAMUNABANK	23.6	23.5	3.8	160	2
MTB	13.5	13.5	3.6	268	1
DAFODILCOM	163.0	160.0	3.5	22	2
DOMINAGE	64.6	63.1	3.3	53	3
JAMUNAOIL	177.5	177.5	2.7	15	1
PADMAOIL	195.0	195.0	2.0	10	1
CITYBANK	30.6	30.6	1.9	62	1
PROVATIINS	60.7	60.7	1.8	30	1
CAPMIBBLMF	16.0	15.5	1.8	113	2
SONARBAINS	38.1	38.1	1.8	46	1
ASIATICLAB	106.0	106.0	1.7	16	1
CENTRALINS	43.8	43.8	1.3	30	2
PRIMEINSUR	40.5	40.5	1.2	30	1
ORIONINFU	251.5	251.5	1.0	4	1
Total			294.2		43

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
NAHEEACP		0.0%	2.3%	Record Date	15-Nov-26
BSRMSTEEL		0.0%	60.0%	Record Date	15-Nov-26

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Important DSE News

SQUARETEXT

The Board of Directors has recommended 32% Cash Dividend for the year ended June 30, 2026. Date of AGM: 15.12.2026, Time: 11:00 AM, Venue: Virtual Platform. Record Date: 16.11.2026. The Company has also reported Consolidated EPS of Tk. 4.50, Consolidated NAV per share of Tk. 57.16 and Consolidated NOCFPS of Tk. 8.71 for the year ended June 30, 2026 as against Tk. 7.24, Tk. 55.86 and Tk. 5.25 respectively for the year ended June 30, 2025. The company also informed that the Board of Directors of the company has approved Tk. 60.00 (sixty) crore for BMRE, Capital Machineries and lands for future expansion.

NITOLINS

(Q3 Un-audited): EPS was Tk. 0.57 for July-September 2026 as against Tk. 0.34 (restated) for July-September 2025; EPS was Tk. 1.36 for January-September 2026 as against Tk. 1.01 (restated) for January-September 2025. NOCFPS was Tk. 0.61 for January-September 2026 as against Tk. 0.56 (restated) for January-September 2025. NAV per share was Tk. 31.66 as on September 30, 2026 and Tk. 30.38 (restated) as on September 30, 2025.

The company has informed that it is currently proceeding with the proposed sale of its office premises located at Yunusco City Centre, 10th Floor, GEC More, Chittagong, comprising 9452 square feet. The key information currently available is as follows: Nature of Transaction: Proposed sale of office space/premises, Property Location: Chittagong, Approximate Area: 9452 sq. ft., Proposed/Indicative Sale Price: 8.50 Crore, Purchaser: G K Network, Current Status: Sale agreement, Expected Completion: January 2027. The Company confirms that the transaction remains subject to other applicable conditions, and there can be no assurance that the proposed transaction will be completed on the terms currently under consideration.

MIDASFIN

(Q3 Un-audited): Consolidated EPS was Tk. (0.06) for July-September 2026 as against Tk. (1.46) for July-September 2025; Consolidated EPS was Tk. (6.27) for January-September 2026 as against Tk. (4.72) for January-September 2025. Consolidated NOCFPS was Tk. (2.63) for January-September 2026 as against Tk. 3.38 for January-September 2025. Consolidated NAV per share was Tk. (24.93) as on September 30, 2026 and Tk. (18.66) as on December 31, 2025.

MIRACLEIND

The Board of Directors has recommended No Dividend for the year ended June 30, 2026. Date of AGM: 24.12.2026, AGM Venue/Mode: AGM will be held at the Factory Premises. Record Date: 15.11.2026. The Company has also reported EPS of Tk. (3.12), NAV per share of Tk. 20.02 and NOCFPS of Tk. 0.49 for the year ended June 30, 2026 as against EPS of Tk. (2.30), NAV per share of Tk. 11.32 and NOCFPS of Tk. (0.52) for the year ended June 30, 2025.

(Q1 Un-audited): EPS was Tk. 0.51 for July-September 2026 as against Tk. (0.77) for July-September 2025. NOCFPS was Tk. 0.11 for July-September 2026 as against Tk. (0.47) for July-September 2025. NAV per share was Tk. 20.53 as on September 30, 2026 and Tk. 10.55 as on September 30, 2025.

GREENDELT

Mr. Azam J Chowdhury, a Sponsor of the company, has expressed his intention to buy 2,027,967 shares of the company at the prevailing market price in the Block Market through Dhaka Stock Exchange PLC. (DSE) within October 29, 2026.