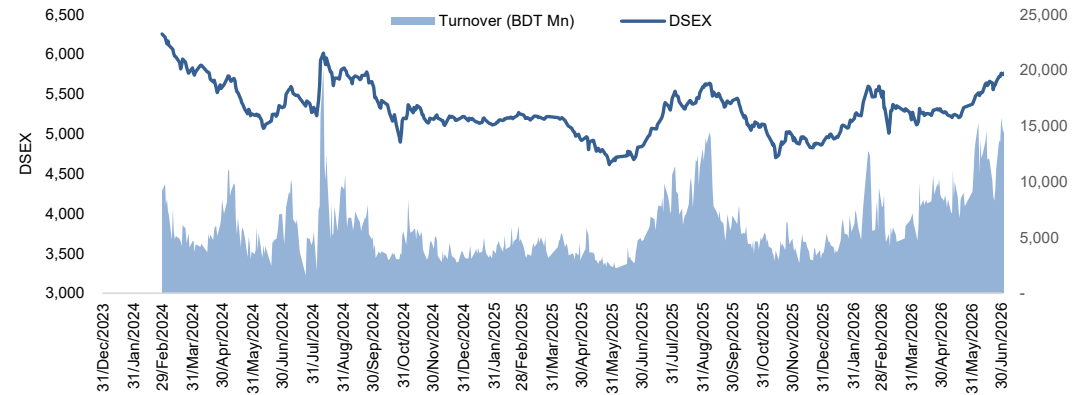


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.75%) lost 96.61 points and closed at 5,418.55. The blue-chip index DS30 (-1.11%), the Shariah-based index DSES (-1.78%), and the large-cap index CDSET (-1.03%) closed at 2,072.01, 1,085.40, and 1,092.02 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.12% followed by Engineering (-1.54%), Fuel & Power (-1.48%), Food & Allied (-1.36%), Bank (-1.30%), Pharmaceutical (-1.27%), and Telecommunication (-0.43%), respectively. Block trades contributed 2.0% of the overall market turnover. Envoy Textiles Limited (-1.5%) was the most traded share with a turnover of BDT 293 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,418.55	5,515.17	-96.61	-1.75%	+11.4%
DS30	2,072.01	2,095.31	-23.30	-1.11%	+11.8%
DSES	1,085.40	1,105.06	-19.66	-1.78%	+8.5%
CDSET	1,092.02	1,103.36	-11.34	-1.03%	+8.7%

	Advanced	Declined	Unchanged	Total
All Category	27	336	21	384
A Category (Equity)	20	162	10	192
B Category (Equity)	2	71	1	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	5	103	10	118
Mutual Funds	12	13	9	34
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,862,972	6,930,680	-1.0%
	Mn USD	55,817	56,368	
Turnover	Mn BDT	5,713	5,444	+4.9%
	Mn USD	46	44	
Volume	Mn Shares	236	218	+8.6%
No. of Trade		182,186	156,869	+16.1%

* Average Interbank Exchange Rate is BDT 122.95 as of Sep 13, 2026

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Figure: Sectorial Turnover (BDT Mn)

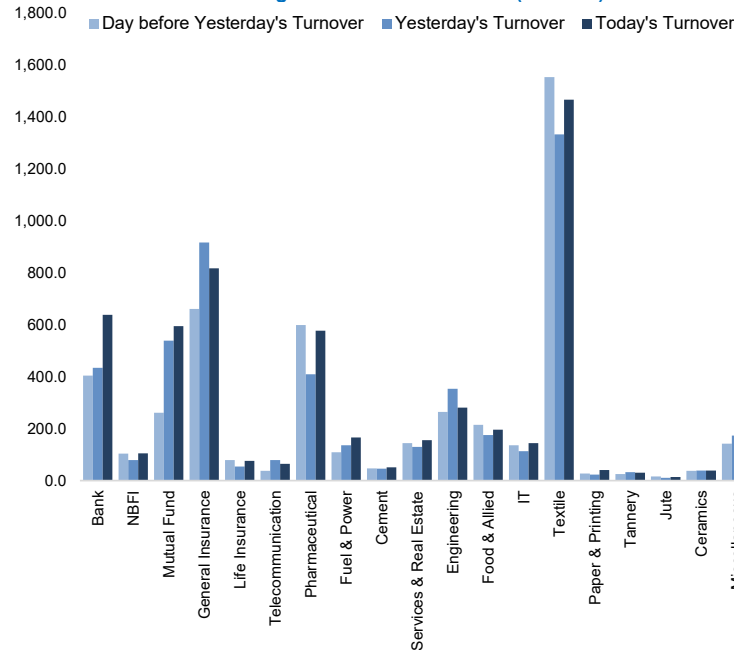
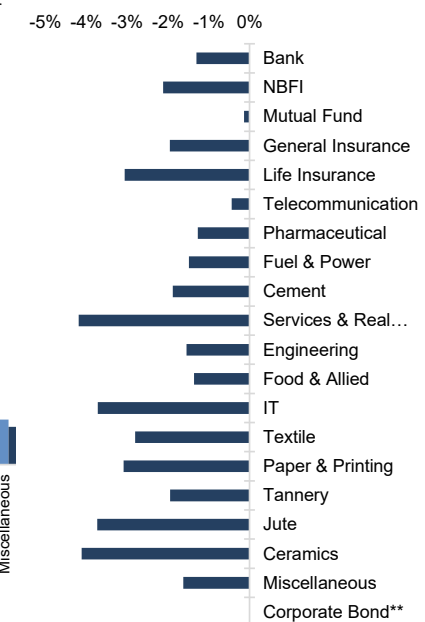


Figure: Sectorial Mcap Change



Market PE 12.8x

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	1,520	1,540	-20.05	-1.30%	36	724,437	10.5%	637.5	11.4%	7.1x	0.7x	GP	321,641	9.4%	24.2	9.1x	5.7x
NBFI	1,055	1,078	-22.81	-2.12%	23	100,350	1.5%	104.7	1.9%	NM	1.1x	SQURPHARMA	188,991	5.5%	49.4	7.3x	1.3x
Mutual Fund	660	661	-0.88	-0.13%	34	30,729	0.4%	594.0	10.6%	NM	0.6x	ROBI	156,614	4.6%	33.2	15.0x	2.4x
General Insurance	4,234	4,318	-84.10	-1.95%	43	119,616	1.7%	815.8	14.6%	17.6x	1.6x	BRACBANK	141,266	4.1%	58.6	6.2x	1.2x
Life Insurance	1,645	1,697	-51.90	-3.06%	15	46,383	0.7%	75.8	1.4%	NM	NM	WALTONHIL	129,890	3.8%	21.5	11.5x	1.0x
Telecommunication	4,355	4,374	-19.02	-0.43%	3	505,283	7.4%	64.8	1.2%	10.4x	3.6x	BATBC	121,230	3.5%	24.4	20.8x	2.1x
Pharmaceutical	3,034	3,073	-38.91	-1.27%	34	572,789	8.3%	576.0	10.3%	10.4x	1.4x	MARICO	83,437	2.4%	20.8	7.4x	18.1x
Fuel & Power	1,070	1,086	-16.11	-1.48%	23	282,518	4.1%	166.1	3.0%	9.1x	0.6x	BERGERPBL	71,631	2.1%	6.0	15.3x	3.3x
Cement	1,898	1,935	-36.34	-1.88%	7	89,317	1.3%	51.1	0.9%	20.7x	2.0x	BXPBARMA	66,337	1.9%	109.8	7.7x	1.1x
Services & Real Estate	1,101	1,149	-48.03	-4.18%	9	59,886	0.9%	155.1	2.8%	24.4x	0.4x	UPGDCL	64,172	1.9%	7.9	6.9x	1.3x
Engineering	2,559	2,599	-40.04	-1.54%	42	286,811	4.2%	280.5	5.0%	15.1x	0.8x	LHB	58,533	1.7%	33.1	11.9x	3.2x
Food & Allied	12,126	12,293	-167.13	-1.36%	21	221,359	3.2%	195.6	3.5%	32.4x	3.3x	RENATA	52,611	1.5%	8.8	19.3x	1.4x
IT	2,331	2,421	-89.97	-3.72%	11	30,862	0.4%	144.4	2.6%	46.0x	1.9x	CITYBANK	51,957	1.5%	42.7	3.4x	0.8x
Textile	1,346	1,385	-38.75	-2.80%	58	140,018	2.0%	1,465.0	26.2%	NM	0.9x	ISLAMIBANK	43,792	1.3%	2.0	NM	0.8x
Paper & Printing	4,221	4,355	-134.40	-3.09%	6	19,770	0.3%	40.8	0.7%	NM	1.3x	DUTCHBANGL	43,545	1.3%	6.7	3.3x	0.7x
Tannery	2,054	2,095	-40.79	-1.95%	6	23,851	0.3%	30.5	0.5%	NM	1.5x	UNILEVERCL	38,429	1.1%	0.4	62.8x	23.6x
Jute	12,504	12,989	-484.63	-3.73%	3	2,727	0.0%	14.2	0.3%	NM	1.7x	EBL	36,983	1.1%	118.3	4.1x	0.7x
Ceramics	430	448	-18.42	-4.11%	5	19,410	0.3%	38.8	0.7%	NM	1.3x	PRIMEBANK	34,365	1.0%	9.5	3.7x	0.7x
Miscellaneous	2,424	2,464	-40.04	-1.62%	15	131,628	1.9%	145.5	2.6%	37.7x	1.0x	POWERGRID	34,359	1.0%	3.2	8.5x	0.3x
Corporate Bond**	18,141	18,141	-	-	16	40,135	0.6%	0.1	0.0%	NM	NM	ICB	33,910	1.0%	0.7	NM	1.3x
Treasury Bond**	2,226	2,237	-11.03	-0.49%	232	3,419,467	49.8%	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
1STPRIMFMF	24.3	+10.0%	60.5	NM	2.5x	SQURPHARMA	105,552	7.3%	7.3x	1.3x	ENVOYTEX	73.4	-1.5%	292.7	8.9x	1.2x
EBL1STMF	4.6	+7.0%	8.2	NM	0.5x	BRACBANK	76,044	5.3%	6.2x	1.2x	SHARPIND	17.4	-8.4%	191.1	NM	2.2x
RELIANCINS	102.6	+5.6%	108.0	10.7x	1.2x	BXPBARMA	46,350	3.2%	7.7x	1.1x	PTL	79.0	+1.2%	166.7	12.5x	1.6x
ICBAMCL2ND	7.7	+5.5%	3.1	NM	0.8x	ISLAMIBANK	43,713	3.0%	NM	0.8x	SAIHAMTEX	34.0	+5.3%	157.8	54.8x	0.8x
SAIHAMTEX	34.0	+5.3%	157.8	54.8x	0.8x	WALTONHIL	42,747	3.0%	11.5x	1.0x	MALEKSPIN	44.9	-3.2%	131.3	7.9x	0.7x
GLDNJMF	9.1	+4.60%	20.5	NM	0.9x	PUBALIBANK	39,900	2.8%	4.9x	0.8x	EXIM1STMF	7.7	+4.1%	123.4	NM	0.8x
NCCBLMF1	7.0	+4.5%	6.9	NM	1x	CITYBANK	36,178	2.5%	3.4x	0.8x	SOUTHEASTB	12.8	+1.6%	123.2	4.3x	0.5x
EXIM1STMF	7.7	+4.1%	123.4	NM	0.8x	GP	32,164	2.2%	9.1x	5.7x	EBL	22.5	-3.0%	118.3	4.1x	0.7x
BNICL	126.1	+3.0%	98.7	21.9x	3.7x	BATBC	32,065	2.2%	20.8x	2.1x	SAIHAMCOT	22.2	-2.2%	115.0	24.4x	0.6x
STANCERAM	69.0	+2.5%	0.2	NM	NM	RENATA	25,627	1.8%	19.3x	1.4x	BXPBARMA	148.7	-1.5%	109.8	7.7x	1.1x
						EBL	25,356	1.8%	4.1x	0.7x						
						PRIMEBANK	21,468	1.5%	3.7x	0.7x						
						LHB	21,429	1.5%	11.9x	3.2x						
						UCB	19,025	1.3%	3.8x	0.5x						
						OLYMPIC	17,866	1.2%	15.0x	2.1x						
						UTTARABANK	17,441	1.2%	NM	0.8x						
						ROBI	15,661	1.1%	15.0x	2.4x						
						BSRMLTD	15,173	1.1%	4.4x	0.5x						
						ALARABANK	14,567	1.0%	19.1x	0.7x						
						BEACONPHAR	13,892	1.0%	15.9x	3.0x						
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)
ORIONINFU	169.9	-9.9%	61.6	97.6x	10.5x						NCCBANK	14.5	14.5	1.0	1,500	21.75
PREMIERLEA	1.9	-9.5%	1.6	NM	NM						SAMORITA	97.0	97.0	1.0	148	14.36
AAMRATECH	15.5	-8.8%	5.1	NM	0.4x						ASIATICLAB	114.0	108.0	3.0	110	12.45
LRBDL	12.4	-8.8%	5.1	NM	0.4x						BNICL	115.0	115.0	1.0	100	11.50
SHARPIND	17.4	-8.4%	191.1	NM	2.2x						ENVOYTEX	70.3	68.1	3.0	133	9.27
SAIFPOWER	8.0	-8.0%	6.0	22.9x	0.5x						KARNAPHULI	60.3	56.0	2.0	113	6.75
ARAMIT	170.0	-7.9%	3.1	NM	1.4x						PROVATIINS	51.2	51.2	1.0	120	6.14
GOLDENSON	11.9	-7.8%	13.4	NM	0.8x						ISLAMIINS	55.0	55.0	1.0	100	5.50
FUWANGCER	12.5	-7.4%	9.6	NM	1.0x						EIL	30.0	29.5	2.0	112	3.33
ZAHEENSPIN	5.1	-7.3%	1.9	7.5x	1.6x						DHAKAINS	48.5	48.5	2.0	68	3.30

* 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
NCCBANK	14.5	14.5	21.8	1,500	1
SAMORITA	97.0	97.0	14.4	148	1
ASIATICLAB	114.0	108.0	12.5	110	3
BNICL	115.0	115.0	11.5	100	1
ENVOYTEX	70.3	68.1	9.3	133	3
KARNAPHULI	60.3	56.0	6.7	113	2
PROVATIINS	51.2	51.2	6.1	120	1
ISLAMIINS	55.0	55.0	5.5	100	1
EIL	30.0	29.5	3.3	112	2
DHAKAINS	48.5	48.5	3.3	68	2
GQBALLPEN	549.0	549.0	3.0	5	1
SAIHAMTEX	35.5	32.0	2.5	74	3
DAFODILCOM	167.0	166.0	2.4	15	2
FEKDIL	21.3	21.3	2.1	100	1
SAPORTL	64.9	64.9	1.9	30	1
CITYGENINS	128.2	128.2	1.9	15	2
PREMIERCEM	45.0	45.0	1.8	39	1
PRAGATIINS	78.0	78.0	1.4	18	1
SALVO	32.7	31.5	1.2	38	2
APEXFOODS	260.0	260.0	1.1	4	1
USMANIAGL	59.4	59.4	0.8	13	1
RUPALIINS	29.8	29.8	0.7	22	1
Total			116.8		37

Important DSE News

GPHISPAT

The Board of Directors has recommended 2% Cash Dividend for the General Shareholders except Sponsors and Directors for the year ended June 30, 2026. The Sponsors and Directors hold 146,247,351 shares and Cash Dividend payable to the General Shareholders is BDT 67,527,221. Date of AGM: 25.10.2026, Time: 11:00 AM, Venue: Hybrid System, combining Physical Presence (Venue: Shah Newaz Eden Park, D. T. Road (beside Fauzderhat Police Farhi), Fauzderhat, Sitakunda, Chattogram and using Digital Platform. Record Date: 01.10.2026. The Company has also reported EPS of Tk. 0.07, NAV per share of Tk. 51.81 and NOCFPS of Tk. 15.73 for the year ended June 30, 2026 as against Tk. (0.51), Tk. 51.72 and Tk. 5.78 respectively for the year ended June 30, 2025.

The company has informed that the Board of Directors approved a proposal for Rights Share issue in the following particulars. Proposed Rights Shares Issue: 02(Two) [R]:01(one) [i.e. 02 (two) Right Share for every 01 (one) ordinary shares held] at an issue price of Tk. 10.00 (ten) each subject to approval by the shareholders in the upcoming AGM and the regulatory authorities. The company will raise a total fund of Tk. 967,76,69,120 through issuing 96,77,66,912 nos. Rights share. Purpose of Rights Share Issue: Repayment of Loan. It is noted that a separate Record Date will be fixed for determining the entitlement to the Rights Shares after obtaining approval from the Bangladesh Securities and Exchange Commission (BSEC).

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
WALTONHIL		10.0%	180.0%	Record Date	20-Sep-26
AAMRANET		0.0%	0.1%	Record Date	24-Sep-26
GPHISPAT		0.0%	2.0%	Record Date	1-Oct-26

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