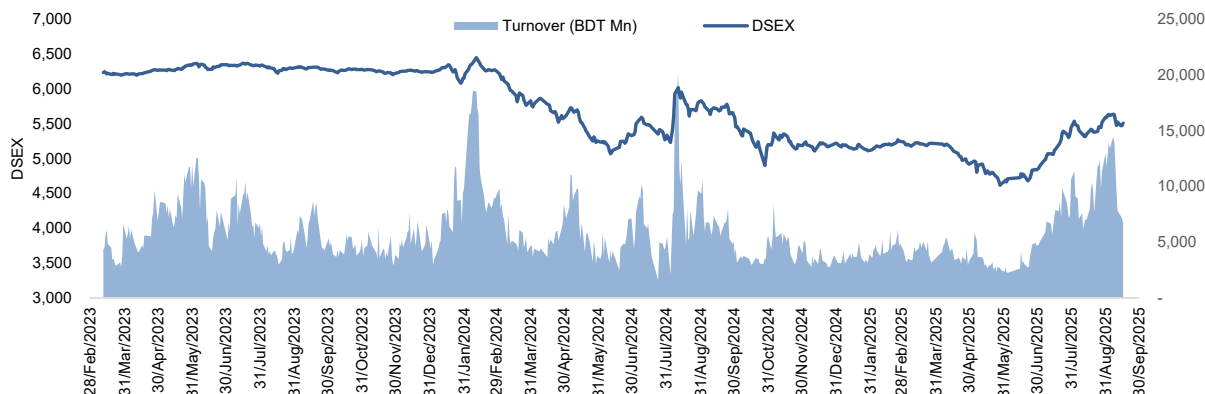


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.64%) gained 34.89 points and closed at 5,509.61. The blue-chip index DS30 (-0.03%), the Shariah-based index DSES (+0.65%), and the large-cap index CDSET (+0.27%) closed at 2,134.43, 1,194.14, and 1,114.63 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 1.77% followed by Bank (+0.99%), Fuel & Power (+0.41%), NBFI (+0.33%), Food & Allied (+0.28%), Pharmaceutical (-0.02%), and Telecommunication (-0.15%), respectively. Block trades contributed 3.1% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-3.1%) was the most traded share with a turnover of BDT 187 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,509.61	5,474.72	+34.89	+0.64%	+5.6%
DS30	2,134.43	2,135.04	-0.61	-0.03%	+10.0%
DSES	1,194.14	1,186.37	+7.77	+0.65%	+2.2%
CDSET	1,114.63	1,111.67	+2.96	+0.27%	+4.6%

	Advanced	Declined	Unchanged	Total
All Category	221	103	76	400
A Category (Equity)	132	53	37	222
B Category (Equity)	58	14	10	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	31	36	29	96
Mutual Funds	1	12	23	36
Corporate Bonds	2	1	2	5
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,266,920	7,244,462	+0.3%
	Mn USD	59,687	59,503	
Turnover	Mn BDT	6,741	7,063	-4.6%
	Mn USD	55	58	
Volume	Mn Shares	229	220	+4.1%
No. of Trade		190,194	197,084	-3.5%

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 16, 2025

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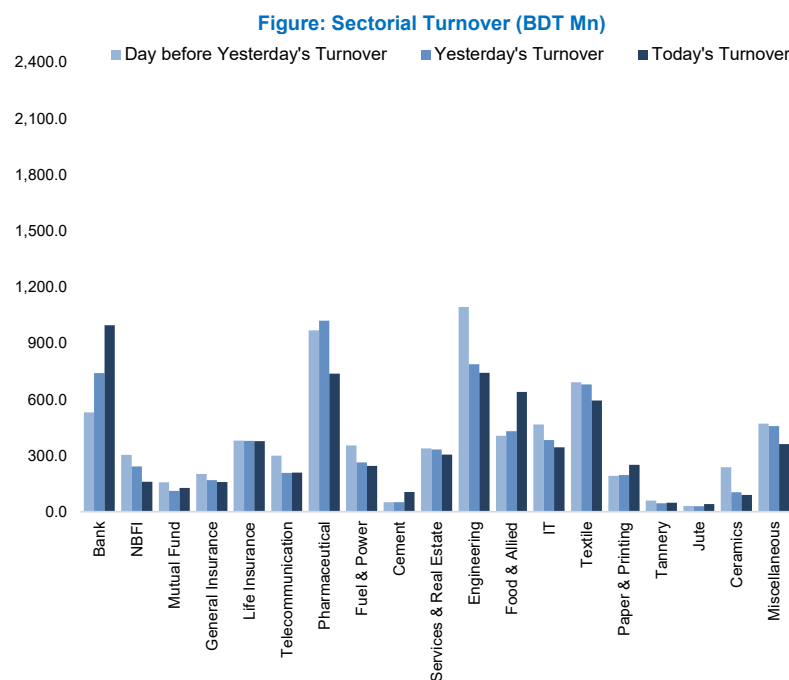
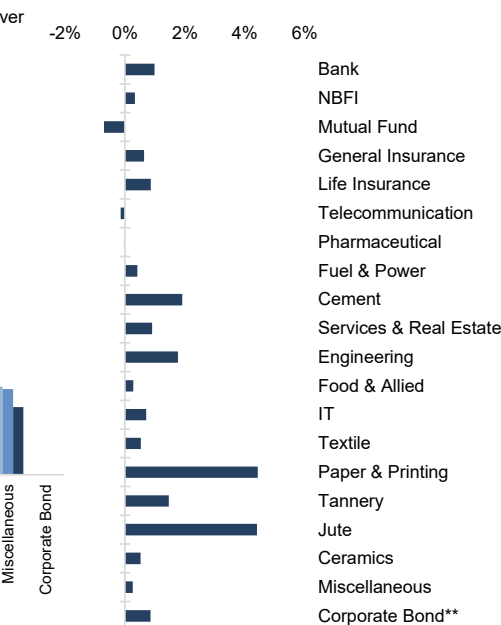


Figure: Sectorial Mcap Change



Market PE 16.7x

Market PB 1.3x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK, 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	1,529	1,514	+15.00	+0.99%	36	723,424	9.9%	995.1	15.2%	NM	0.8x	GP	407,521	11.0%	7.0	13.8x	7.2x
NBFI	1,131	1,127	+3.76	+0.33%	23	107,754	1.5%	160.3	2.5%	NM	NM	SQURPHARMA	195,906	5.3%	53.5	8.3x	1.5x
Mutual Fund	568	572	-4.01	-0.70%	37	27,200	0.4%	127.5	2.0%	NM	0.5x	ROBI	158,186	4.3%	175.7	18.2x	2.5x
General Insurance	2,913	2,894	+18.39	+0.64%	43	83,122	1.1%	158.7	2.4%	14.0x	1.2x	BATBC	153,468	4.1%	30.0	12.4x	2.9x
Life Insurance	2,098	2,080	+18.00	+0.87%	15	55,807	0.8%	377.0	5.8%	NM	NM	WALTONHIL	144,103	3.9%	46.3	13.9x	1.2x
Telecommunication	5,055	5,062	-7.38	-0.15%	3	592,715	8.1%	208.8	3.2%	15.0x	4.3x	BRACBANK	142,351	3.8%	65.0	10.1x	1.7x
Pharmaceutical	3,148	3,149	-0.52	-0.02%	34	596,847	8.2%	737.5	11.3%	13.7x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,182	1,177	+4.88	+0.41%	23	313,068	4.3%	244.7	3.7%	19.8x	0.7x	MARICO	90,399	2.4%	3.3	14.8x	27.1x
Cement	2,095	2,056	+39.31	+1.91%	7	99,843	1.4%	105.4	1.6%	23.0x	2.2x	UPGDCL	82,201	2.2%	5.6	7.1x	2.0x
Services & Real Estate	1,115	1,105	+9.99	+0.90%	9	61,315	0.8%	305.3	4.7%	27.1x	0.5x	BERGERPBL	70,919	1.9%	11.7	20.2x	4.1x
Engineering	2,643	2,597	+46.00	+1.77%	42	298,162	4.1%	742.3	11.4%	16.0x	0.9x	LHB	63,411	1.7%	19.0	16.9x	3.3x
Food & Allied	14,895	14,854	+41.24	+0.28%	21	272,535	3.7%	639.2	9.8%	20.6x	4.3x	RENATA	56,373	1.5%	13.6	20.0x	1.6x
IT	2,076	2,061	+14.71	+0.71%	11	27,384	0.4%	343.5	5.3%	23.0x	1.7x	BXPHARMA	55,050	1.5%	37.1	8.6x	1.1x
Textile	1,224	1,218	+6.50	+0.53%	58	127,521	1.8%	594.0	9.1%	NM	0.9x	UNILEVERCL	47,773	1.3%	0.2	75.2x	26.2x
Paper & Printing	5,574	5,337	+236.75	+4.44%	6	25,183	0.3%	250.2	3.8%	NM	1.2x	ICB	46,485	1.3%	11.2	NM	1.1x
Tannery	2,113	2,083	+30.52	+1.47%	6	23,546	0.3%	48.1	0.7%	NM	1.8x	DUTCHBANGL	41,085	1.1%	5.2	10.9x	0.8x
Jute	14,185	13,586	+599.06	+4.41%	3	3,122	0.0%	40.6	0.6%	NM	NM	EBL	40,534	1.1%	24.9	5.8x	0.9x
Ceramics	437	435	+2.27	+0.52%	5	19,605	0.3%	90.0	1.4%	NM	1.3x	CITYBANK	39,704	1.1%	110.8	3.7x	0.7x
Miscellaneous	4,179	4,168	+10.88	+0.26%	15	226,935	3.1%	360.6	5.5%	89.9x	1.8x	PUBALIBANK	38,392	1.0%	7.8	5.2x	0.7x
Corporate Bond**	16,572	16,431	+140.41	+0.85%	16	36,586	0.5%	1.3	0.0%	NM	NM	PRIMEBANK	32,497	0.9%	10.8	3.9x	0.8x
Treasury Bond**	2,309	2,306	+2.41	+0.10%	236	3,552,446	48.8%	0.2	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
CROWNCEMNT	63.5	+9.9%	45.4	14.5x	1.1x	SQURPHARMA	108,958	7.7%	8.3x	1.5x	LOVELLO	98.4	-3.1%	186.7	44.3x	7.8x
UCB	10.6	+9.3%	120.9	4.4x	0.4x	ISLAMIBANK	74,730	5.3%	NM	1.0x	SAPORTL	36.0	-0.3%	180.4	13.4x	1.0x
METROSPIN	11.8	+9.3%	16.3	NM	2.5x	BEXIMCO	69,463	4.9%	NM	1.3x	ROBI	30.2	-1.3%	175.7	18.2x	2.5x
SONALIPAPR	273.6	+7.6%	123.9	26.5x	1.6x	BATBC	50,233	3.6%	12.4x	2.9x	KBPPWBIL	151.4	+0.9%	140.1	NM	12.7x
ISNLTD	108.5	+7.0%	88.9	NM	39.5x	WALTONHIL	46,773	3.3%	13.9x	1.2x	SONALIPAPR	273.6	+7.6%	123.9	26.5x	1.6x
MONNOFABR	21.1	+6.57%	58.5	NM	0.8x	BRACBANK	46,489	3.3%	10.1x	1.7x	ORIONINFU	513.8	+0.5%	123.3	NM	32.7x
MIDLANDBNK	21.3	+6.5%	104.3	21.9x	1x	GP	44,708	3.2%	13.8x	7.2x	UCB	10.6	+9.3%	120.9	4.4x	0.4x
MONOSPOOL	114.9	+6.3%	32.1	31.3x	2.6x	RENATA	32,968	2.3%	20.0x	1.6x	TECHNODRUG	38.1	-0.3%	115.1	NM	1.3x
BDTHAIFOOD	16.9	+6.3%	68.5	NM	1.2x	BXPHARMA	23,409	1.7%	8.6x	1.1x	CITYBANK	26.1	-0.4%	110.8	3.7x	0.7x
HAMI	125.5	+6.1%	26.4	NM	13.8x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	PRAGATILIF	199.1	+1.2%	109.0	NM	NM
						CITYBANK	21,020	1.5%	3.7x	0.7x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	16.9x	3.3x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PLFSL	1.1	-8.3%	0.1	NM	NM	OLYMPIC	20,496	1.5%	17.5x	2.7x	PRIMEBANK	25.2	25.2	1.0	2,375	59.85
FAREASTFIN	1.4	-6.7%	0.5	NM	NM	ALARABANK	18,282	1.3%	36.9x	0.8x	ORIONINFU	510.5	510.2	2.0	101	51.54
MIDASFIN	6.2	-6.1%	0.6	NM	4.2x	BEACONPHAR	17,838	1.3%	34.8x	4.6x	FINEFOODS	295.0	290.0	3.0	88	25.71
CAPMBDBLMF	11.1	-5.1%	32.3	NM	1.3x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	CITYBANK	27.5	27.5	1.0	600	16.50
DACCADYE	20.4	-5.1%	13.0	NM	0.7x	ROBI	14,876	1.1%	18.2x	2.5x	KBPPWBIL	140.3	136.0	8.0	105	14.38
FAMILYTEX	1.9	-5.0%	0.4	NM	0.2x	UTTARABANK	13,699	1.0%	NM	0.8x	AL-HAJTEX	172.0	163.0	7.0	36	6.12
UNIONBANK	1.9	-5.0%	1.2	5.1x	0.1x	NBL	13,055	0.9%	NM	NM	ONEBANKPLC	7.5	7.5	1.0	678	5.09
EXIMBANK	4.0	-4.8%	16.1	NM	0.2x	BSRMLTD	12,852	0.9%	5.1x	0.5x	LOVELLO	108.0	108.0	1.0	37	3.95
SALAMCRST	22.9	-4.2%	80.8	NM	1.2x						WALTONHIL	466.0	451.0	4.0	8	3.75
PRIMEFIN	2.5	-3.8%	0.5	NM	0.4x						UCB	10.6	9.6	3.0	371	3.61
						* 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										

* 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
PRIMEBANK	25.2	25.2	59.9	2,375	1
ORIONINFU	510.5	510.2	51.5	101	2
FINEFOODS	295.0	290.0	25.7	88	3
CITYBANK	27.5	27.5	16.5	600	1
KBPPWBIL	140.3	136.0	14.4	105	8
AL-HAJTEX	172.0	163.0	6.1	36	7
ONEBANKPLC	7.5	7.5	5.1	678	1
LOVELLO	108.0	108.0	4.0	37	1
WALTONHIL	466.0	451.0	3.8	8	4
UCB	10.6	9.6	3.6	371	3
CITYGENINS	64.0	64.0	3.2	50	1
GQBALLPEN	440.0	440.0	2.5	6	2
AAMRANET	18.9	18.9	1.9	100	1
RANFOUNDRY	169.0	169.0	1.7	10	1
SAIHAMCOT	18.7	18.6	1.5	83	2
ASIATICLAB	63.2	62.0	1.3	20	2
MARICO	2,870.0	2,870.0	1.1		1
CAPMBDBLMF	10.6	10.6	1.1	100	1
DBH1STMF	5.7	5.7	0.8	140	1
TILIL	71.0	71.0	0.7	10	1
BANGAS	138.0	138.0	0.7	5	1
BSRMSTEEL	66.6	66.6	0.7	10	1
Total			211.2		52

Important DSE News
BAYLEASING

The company has informed that the Board of Directors has elected Mrs. Fatema Zahir Mazumder as the Chairman of the Board of Directors of the company.

MERCINS

The company has informed that the Board of Directors has elected Mr. Abdul Haque as the Chairman of the company.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PREMIERBAN		0.0%	0.0%	Record Date	17-Sep-25
ISLAMIBANK		0.0%	0.0%	Record Date	23-Sep-25
WALTONHIL		10.0%	175.0%	Record Date	28-Sep-25
EHL		0.0%	25.0%	Record Date	5-Oct-25
GSPFINANCE		0.0%	0.0%	Record Date	14-Oct-25
RUPALILIFE		0.0%	10.0%	Record Date	3-Nov-25

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