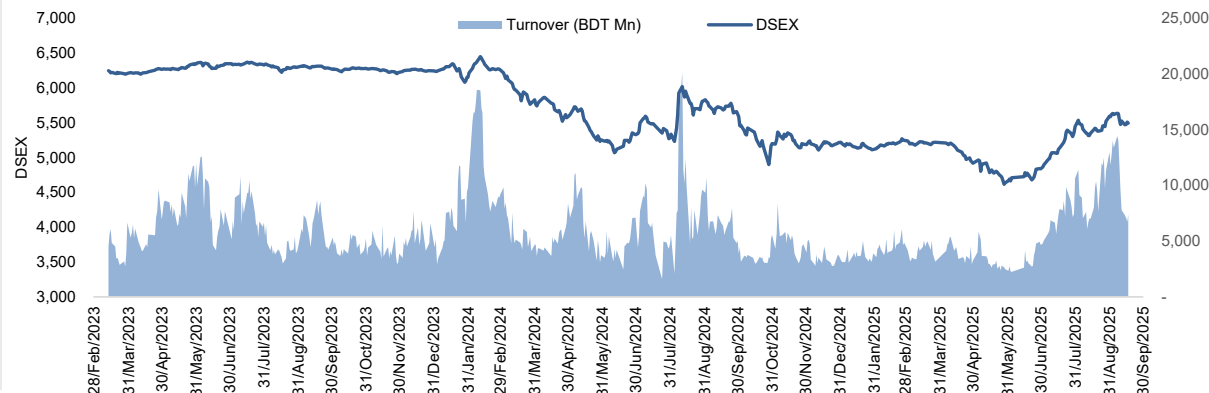


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.31%) lost 17.26 points and closed at 5,492.34. The blue-chip index DS30 (-0.34%), the Shariah-based index DSES (-0.24%), and the large-cap index CDSET (-0.35%) closed at 2,127.12, 1,191.30, and 1,110.78 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.30% followed by Bank (-1.27%), Pharmaceutical (-0.34%), Food & Allied (-0.25%), Telecommunication (-0.15%), Fuel & Power (-0.12%), and Engineering (+0.03%), respectively. Block trades contributed 2.7% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (+6.7%) was the most traded share with a turnover of BDT 420 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,492.34	5,509.61	-17.26	-0.31%	+5.3%
DS30	2,127.12	2,134.43	-7.31	-0.34%	+9.7%
DSES	1,191.30	1,194.14	-2.84	-0.24%	+1.9%
CDSET	1,110.78	1,114.63	-3.85	-0.35%	+4.2%

	Advanced	Declined	Unchanged	Total
All Category	123	189	84	396
A Category (Equity)	67	103	48	218
B Category (Equity)	29	44	9	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	27	42	27	96
Mutual Funds	8	6	22	36
Corporate Bonds	1	2	0	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,260,105	7,266,920	-0.1%
	Mn USD	59,631	59,687	
Turnover	Mn BDT	7,376	6,741	+9.4%
	Mn USD	61	55	
Volume	Mn Shares	218	229	-4.6%
No. of Trade		207,321	190,194	+9.0%

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 17, 2025

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Figure: Sectorial Turnover (BDT Mn)

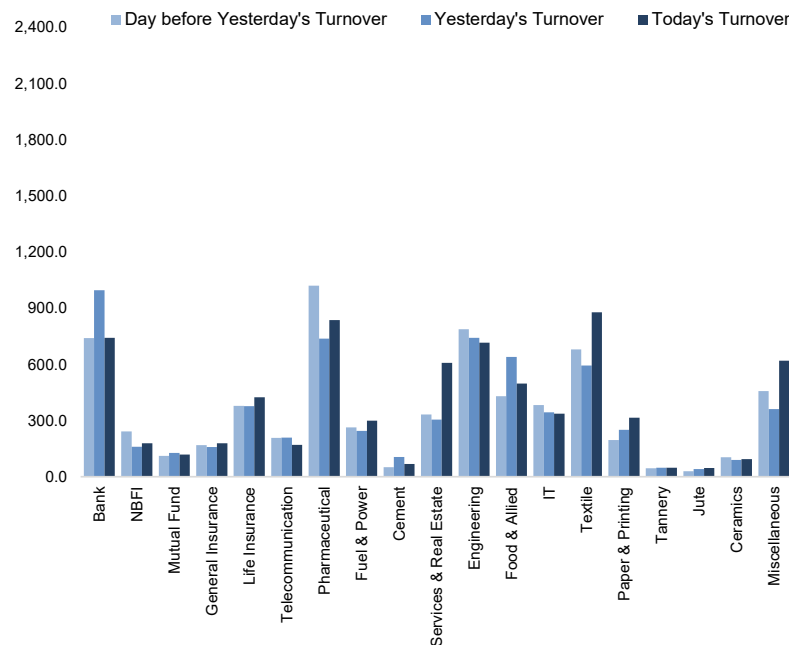
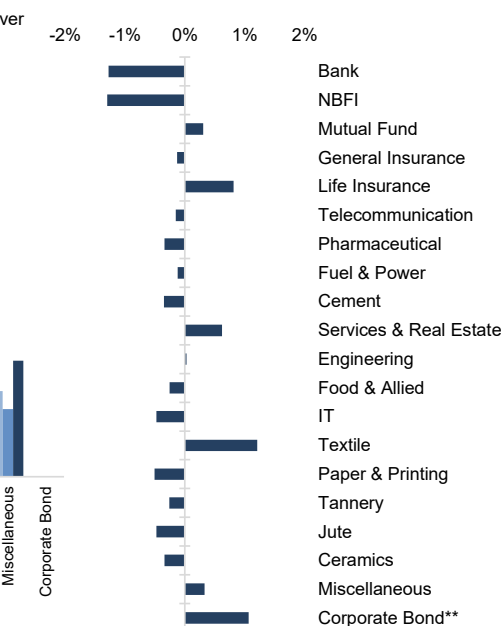


Figure: Sectorial Mcap Change



Market PE 16.6x

Market PB 1.2x

* 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	1,509	1,529	-19.45	-1.27%	36	714,125	9.8%	741.1	10.3%	NM	0.8x	GP	407,521	11.0%	7.5	13.8x	7.2x
NBFI	1,116	1,131	-14.65	-1.30%	23	106,357	1.5%	178.8	2.5%	NM	NM	SQURPHARMA	195,462	5.3%	27.3	8.3x	1.5x
Mutual Fund	569	568	+1.74	+0.31%	37	27,284	0.4%	118.0	1.6%	NM	0.5x	ROBI	157,662	4.3%	137.9	18.1x	2.4x
General Insurance	2,909	2,913	-3.72	-0.13%	43	83,015	1.1%	178.7	2.5%	14.0x	1.2x	BATBC	153,252	4.1%	16.5	12.3x	2.9x
Life Insurance	2,115	2,098	+17.09	+0.81%	15	56,262	0.8%	424.0	5.9%	NM	NM	WALTONHIL	144,224	3.9%	33.8	13.9x	1.2x
Telecommunication	5,047	5,055	-7.50	-0.15%	3	591,835	8.1%	170.5	2.4%	15.0x	4.3x	BRACBANK	140,559	3.8%	135.9	9.9x	1.7x
Pharmaceutical	3,137	3,148	-10.65	-0.34%	34	594,828	8.2%	835.9	11.7%	13.6x	1.6x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,180	1,182	-1.43	-0.12%	23	312,689	4.3%	298.8	4.2%	19.8x	0.7x	MARICO	89,236	2.4%	10.4	14.6x	26.8x
Cement	2,088	2,095	-7.34	-0.35%	7	99,494	1.4%	68.1	0.9%	22.9x	2.2x	UPGDCL	82,201	2.2%	5.6	7.1x	2.0x
Services & Real Estate	1,122	1,115	+6.96	+0.62%	9	61,698	0.8%	607.8	8.5%	27.3x	0.5x	BERGERPBL	70,939	1.9%	4.3	20.2x	4.1x
Engineering	2,644	2,643	+0.83	+0.03%	42	298,255	4.1%	715.3	10.0%	16.0x	0.9x	LHB	63,179	1.7%	14.9	16.8x	3.3x
Food & Allied	14,857	14,895	-37.55	-0.25%	21	271,847	3.7%	497.9	6.9%	20.6x	4.3x	RENATA	56,637	1.5%	15.7	20.1x	1.6x
IT	2,066	2,076	-9.84	-0.47%	11	27,254	0.4%	336.5	4.7%	22.9x	1.7x	BXPHARMA	54,470	1.5%	34.9	8.5x	1.1x
Textile	1,239	1,224	+14.82	+1.21%	58	129,064	1.8%	877.9	12.2%	NM	0.9x	UNILEVERCL	47,259	1.3%	0.3	74.4x	25.9x
Paper & Printing	5,546	5,574	-28.06	-0.50%	6	25,056	0.3%	315.3	4.4%	NM	1.2x	ICB	45,878	1.2%	16.6	NM	1.1x
Tannery	2,108	2,113	-5.49	-0.26%	6	23,484	0.3%	48.2	0.7%	NM	1.8x	DUTCHBANGL	40,698	1.1%	2.3	10.8x	0.8x
Jute	14,117	14,185	-67.38	-0.48%	3	3,108	0.0%	46.5	0.6%	NM	NM	EBL	40,534	1.1%	13.3	5.8x	0.9x
Ceramics	436	437	-1.49	-0.34%	5	19,538	0.3%	93.9	1.3%	NM	1.3x	CITYBANK	39,248	1.1%	96.4	3.6x	0.7x
Miscellaneous	4,193	4,179	+13.88	+0.33%	15	227,689	3.1%	620.2	8.6%	90.2x	1.8x	PUBALIBANK	38,392	1.0%	8.9	5.2x	0.7x
Corporate Bond**	16,749	16,572	+177.09	+1.07%	16	36,977	0.5%	0.9	0.0%	NM	NM	OLYMPIC	32,590	0.9%	32.7	17.6x	2.7x
Treasury Bond**	2,313	2,309	+4.28	+0.19%	236	3,557,405	49.0%	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
PLFSL	1.2	+9.1%	1.2	NM	NM	SQURPHARMA	108,958	7.7%	8.3x	1.5x	KBPPWBIL	161.6	+6.7%	419.7	NM	13.5x
ENVOYTEX	58.3	+8.0%	177.7	8.4x	1.0x	ISLAMIBANK	74,730	5.3%	NM	1.0x	SEAPEARL	52.7	+1.7%	285.6	NM	3.2x
KBPPWBIL	161.6	+6.7%	419.7	NM	13.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SAPORTL	38.3	+6.4%	268.7	14.2x	1.1x
SAPORTL	38.3	+6.4%	268.7	14.2x	1.1x	BATBC	50,233	3.6%	12.3x	2.9x	TECHNODRUG	38.7	+1.6%	192.0	NM	1.3x
GEMINISEA	182.9	+5.8%	44.3	NM	14.9x	WALTONHIL	46,773	3.3%	13.9x	1.2x	SONALIPAPR	275.7	+0.8%	187.4	26.7x	1.6x
FAMILYTEX	2.0	+5.26%	0.5	NM	0.2x	BRACBANK	46,489	3.3%	9.9x	1.7x	ENVOYTEX	58.3	+8.0%	177.7	8.4x	1.0x
APEXSPINN	154.4	+4.5%	47.5	41.5x	2x	GP	44,708	3.2%	13.8x	7.2x	ORIONINFU	528.8	+2.9%	165.2	NM	33.7x
GPHISPAT	21.6	+4.3%	58.7	27.4x	0.4x	RENATA	32,968	2.3%	20.1x	1.6x	LOVELLO	97.3	-1.1%	141.0	43.8x	7.7x
RAHIMTEXT	176.8	+4.0%	9.7	NM	7.0x	BXPHARMA	23,409	1.7%	8.5x	1.1x	ROBI	30.1	-0.3%	137.9	18.1x	2.4x
CAPITECGBF	7.8	+4.0%	23.8	NM	0.7x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	PRAGATILIF	204.2	+2.6%	136.5	NM	NM
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.6x	0.7x	LHB	20,953	1.5%	16.8x	3.3x	
PRIMEFIN	2.3	-8.0%	1.4	NM	0.3x	OLYMPIC	20,496	1.5%	17.6x	2.7x	ALARABANK	18,282	1.3%	37.1x	0.8x	
BIFC	3.6	-7.7%	0.5	NM	NM	BEACONPHAR	17,838	1.3%	34.5x	4.6x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	
EXIMBANK	3.7	-7.5%	8.8	NM	0.2x	ROBI	14,876	1.1%	18.1x	2.4x	UTTARABANK	13,699	1.0%	NM	0.8x	
FAREASTFIN	1.3	-7.1%	1.3	NM	NM	NBL	13,055	0.9%	NM	NM	BSRMLTD	12,852	0.9%	5.1x	0.5x	
FASFIN	1.3	-7.1%	0.4	NM	NM											
SIBL	4.4	-6.4%	2.9	NM	0.3x											
INTECH	34.7	-6.0%	75.2	NM	NM											
GENNEXT	3.2	-5.9%	2.6	NM	0.3x											
PREMIERLEA	1.6	-5.9%	0.1	NM	NM											
DESHBANDHU	22.1	-5.2%	44.7	NM	1.3x											

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FINEFOODS	283.5	283.5	2.0	283	80.23
KBPPWBIL	155.0	138.0	7.0	274	38.16
PTL	60.4	55.0	7.0	446	24.75
IPDC	23.0	23.0	2.0	432	9.94
ORIONINFU	507.1	481.1	8.0	16	7.71
SAPORTL	36.0	32.4	4.0	167	5.70
DBH1STMF	5.8	5.8	1.0	869	5.04
ASIATICLAB	64.0	57.0	5.0	65	3.99
RANFOUNDRY	183.5	169.0	3.0	19	3.28
GQBALLPEN	444.0	444.0	2.0	6	2.50

* 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
FINEFOODS	283.5	283.5	80.2	283	2
KBPPWBIL	155.0	138.0	38.2	274	7
PTL	60.4	55.0	24.8	446	7
IPDC	23.0	23.0	9.9	432	2
ORIONINFU	507.1	481.1	7.7	16	8
SAPORTL	36.0	32.4	5.7	167	4
DBH1STMF	5.8	5.8	5.0	869	1
ASIATICLAB	64.0	57.0	4.0	65	5
RANFOUNDRY	183.5	169.0	3.3	19	3
GQBALLPEN	444.0	444.0	2.5	6	2
UCB	10.6	10.6	2.4	225	1
AL-HAJTEX	163.0	163.0	2.0	12	1
BPML	40.1	40.1	1.9	47	1
TILIL	67.0	67.0	1.9	28	1
INTECH	40.5	40.5	1.7	42	1
BEACONPHAR	140.0	120.0	1.6	13	3
MEGHNALIFE	66.0	66.0	1.5	22	2
CITYGENINS	62.3	62.3	1.0	16	1
AGRANINS	28.7	28.7	1.0	35	1
MONNOFABR	19.1	19.1	0.9	48	1
HAMI	118.3	118.3	0.7	6	1
PROGRESLIF	62.3	62.3	0.7	11	1
Total			201.5		61

Important DSE News
SHEPHERD

The company has informed that the Board of Directors of Shepherd Industries PLC in its Meeting held on 16th September 2025 has decided to sell a piece of land located at the Rajuk Purbachal New City Project. The details of the transaction are as follows: Land Area: 10 Katha 08 Chotak 46 Square feet. Total Sale Price: Tk. 7.00 Crore. Utilization of Fund: The sales proceed will be used for repayment/adjustment of bank loan. Cost of Land at the time of acquisition: Tk. 3.29 Crore. The aforesaid transaction will have an impact of Tk. 3.71 Crore, and accordingly, the Gross profit of the company will increase by Tk. 3.71 Crore, which will have a positive impact on the Earnings Per Share (EPS) of the company. The completion of the transaction is subject to obtaining necessary approvals from RAJUK and the No Objection Certificate (NOC) from Southeast Bank PLC.

MIDASFIN

Referring to their earlier news disseminated by DSE on 09.03.2025, the remaining 4,434 shares held by Late Rokia Afzal Rahman will also be transmitted to the account of her nominee Mr. Imran Faiz Rahman.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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