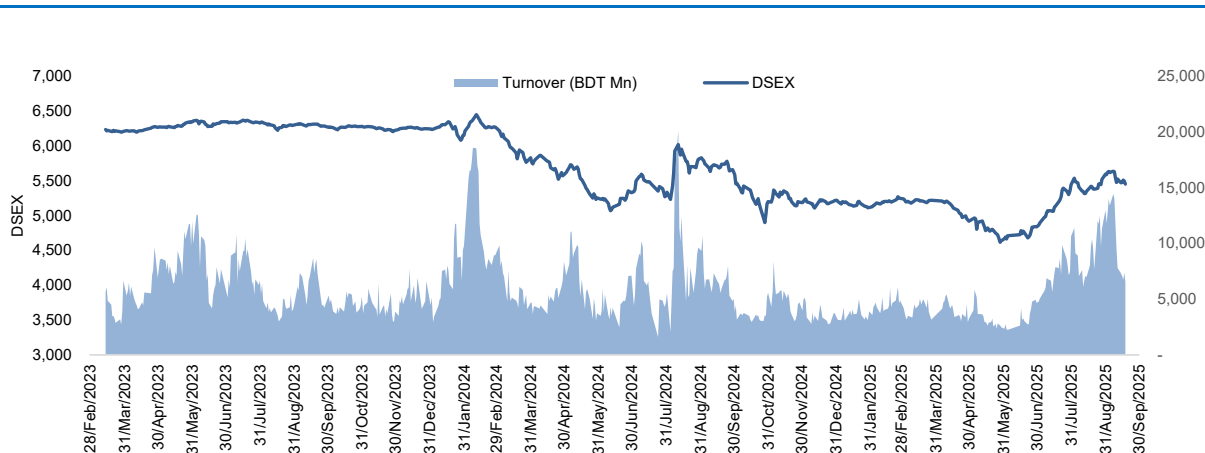


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.77%) lost 42.41 points and closed at 5,449.93. The blue-chip index DS30 (-0.94%), the Shariah-based index DSES (-1.10%), and the large-cap index CDSET (-0.66%) closed at 2,107.14, 1,178.20, and 1,103.50 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.96% followed by Engineering (-1.11%), Telecommunication (-0.91%), Pharmaceutical (-0.68%), Food & Allied (-0.60%), Bank (-0.46%), and Fuel & Power (-0.08%), respectively. Block trades contributed 4.6% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (+1.1%) was the most traded share with a turnover of BDT 300 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,449.93	5,492.34	-42.41	-0.77%	+4.5%
DS30	2,107.14	2,127.12	-19.99	-0.94%	+8.6%
DSES	1,178.20	1,191.30	-13.10	-1.10%	+0.8%
CDSET	1,103.50	1,110.78	-7.28	-0.66%	+3.5%

	Advanced	Declined	Unchanged	Total
All Category	44	303	50	397
A Category (Equity)	28	163	28	219
B Category (Equity)	7	72	3	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	9	68	19	96
Mutual Funds	1	19	16	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	7,244,667	7,260,105	-0.2%
	Mn USD	59,504	59,631	
Turnover	Mn BDT	6,547	7,376	-11.2%
	Mn USD	54	61	
Volume	Mn Shares	211	218	-3.1%
No. of Trade		192,437	207,321	-7.2%

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 18, 2025

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Figure: Sectorial Turnover (BDT Mn)

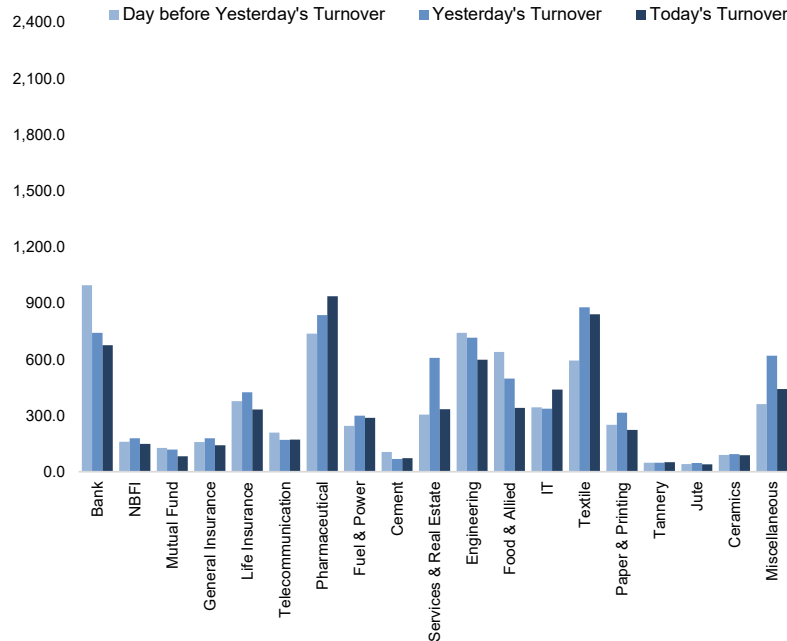
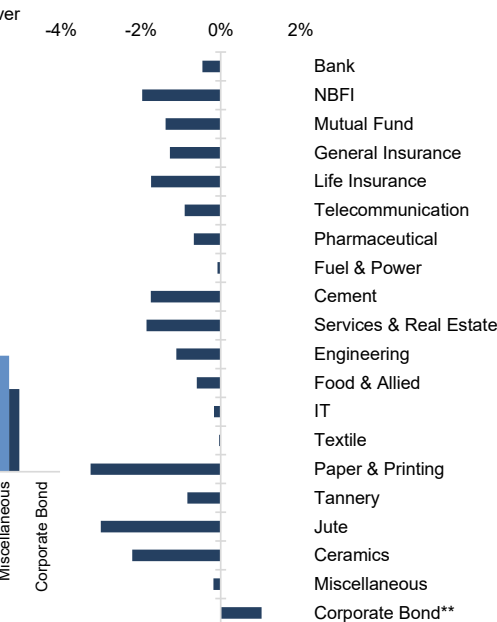


Figure: Sectorial Mcap Change



Market PE 16.5x

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	1,503	1,509	-6.87	-0.46%	36	710,874	9.8%	676.2	10.8%	NM	0.8x	GP	406,575	11.1%	10.9	13.8x	7.1x
NBFI	1,094	1,116	-21.92	-1.96%	23	104,269	1.4%	148.8	2.4%	NM	NM	SQURPHARMA	195,019	5.3%	24.5	8.3x	1.4x
Mutual Fund	561	569	-7.88	-1.38%	37	26,907	0.4%	82.7	1.3%	NM	0.5x	ROBI	153,995	4.2%	141.4	17.7x	2.4x
General Insurance	2,870	2,907	-36.93	-1.27%	43	81,912	1.1%	141.9	2.3%	13.8x	1.2x	BATBC	152,928	4.2%	16.5	12.3x	2.8x
Life Insurance	2,078	2,115	-36.94	-1.75%	15	55,279	0.8%	331.8	5.3%	NM	NM	WALTONHIL	143,346	3.9%	37.3	13.8x	1.2x
Telecommunication	5,002	5,047	-45.71	-0.91%	3	586,475	8.1%	171.0	2.7%	14.9x	4.3x	BRACBANK	140,360	3.8%	48.8	9.9x	1.7x
Pharmaceutical	3,116	3,137	-21.22	-0.68%	34	590,805	8.1%	937.6	15.0%	13.6x	1.6x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,179	1,180	-0.96	-0.08%	23	312,434	4.3%	288.3	4.6%	19.7x	0.7x	MARICO	89,570	2.4%	3.7	14.6x	26.9x
Cement	2,051	2,088	-36.53	-1.75%	7	97,753	1.3%	72.6	1.2%	22.5x	2.2x	UPGDCL	82,259	2.2%	3.3	7.1x	2.0x
Services & Real Estate	1,101	1,122	-20.83	-1.86%	9	60,553	0.8%	333.4	5.3%	26.8x	0.5x	BERGERPBL	70,845	1.9%	2.4	20.2x	4.1x
Engineering	2,615	2,644	-29.34	-1.11%	42	294,946	4.1%	598.4	9.6%	15.8x	0.9x	LHB	62,366	1.7%	33.2	16.6x	3.3x
Food & Allied	14,769	14,857	-88.65	-0.60%	21	270,225	3.7%	341.0	5.5%	20.5x	4.3x	RENATA	56,213	1.5%	13.5	20.0x	1.6x
IT	2,063	2,066	-3.44	-0.17%	11	27,209	0.4%	438.2	7.0%	22.9x	1.7x	BXPHARMA	52,686	1.4%	72.6	8.2x	1.1x
Textile	1,239	1,239	-0.53	-0.04%	58	129,009	1.8%	840.8	13.5%	NM	0.9x	UNILEVERCL	47,033	1.3%	0.2	74.0x	25.8x
Paper & Printing	5,365	5,546	-180.72	-3.26%	6	24,239	0.3%	223.0	3.6%	NM	1.1x	ICB	44,837	1.2%	18.7	NM	1.1x
Tannery	2,090	2,108	-17.66	-0.84%	6	23,288	0.3%	51.2	0.8%	NM	1.7x	EBL	40,374	1.1%	16.4	5.8x	0.9x
Jute	13,693	14,117	-424.04	-3.00%	3	3,014	0.0%	38.9	0.6%	NM	NM	DUTCHBANGL	39,925	1.1%	9.1	10.6x	0.8x
Ceramics	426	436	-9.66	-2.22%	5	19,105	0.3%	88.1	1.4%	NM	1.2x	CITYBANK	39,095	1.1%	87.7	3.6x	0.7x
Miscellaneous	4,185	4,193	-7.60	-0.18%	15	227,276	3.1%	441.3	7.1%	90.0x	1.8x	PUBALIBANK	38,132	1.0%	8.4	5.2x	0.7x
Corporate Bond**	16,921	16,749	+171.80	+1.03%	16	37,356	0.5%	1.5	0.0%	NM	NM	PRIMEBANK	32,148	0.9%	17.8	3.8x	0.8x
Treasury Bond**	2,322	2,313	+8.73	+0.38%	236	3,569,052	49.2%	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
UCB	11.1	+5.7%	121.9	4.4x	0.4x	SQURPHARMA	108,958	7.7%	8.3x	1.4x	KBPPWBIL	163.3	+1.1%	300.3	NM	13.7x
TECHNODRUG	40.7	+5.2%	190.8	NM	1.3x	ISLAMIBANK	74,730	5.3%	NM	1.0x	SAPORTL	37.6	-1.8%	196.6	14.0x	1.1x
ENVOYTEX	61.0	+4.6%	151.6	8.8x	1.1x	BEXIMCO	69,463	4.9%	NM	1.3x	TECHNODRUG	40.7	+5.2%	190.8	NM	1.3x
APOLOISPAT	2.8	+3.7%	0.2	NM	0.1x	BATBC	50,233	3.6%	12.3x	2.8x	ISNLTD	108.3	-0.5%	169.9	NM	39.4x
MATINSPINN	56.2	+3.7%	50.0	13.6x	1.0x	WALTONHIL	46,773	3.3%	13.8x	1.2x	ORIONINFU	530.6	+0.3%	160.6	NM	33.8x
CNATEX	3.1	+3.33%	1.6	NM	NM	BRACBANK	46,489	3.3%	9.9x	1.7x	ENVOYTEX	61.0	+4.6%	151.6	8.8x	1.1x
POWERGRID	35.0	+2.9%	61.4	NM	0x	GP	44,708	3.2%	13.8x	7.1x	ROBI	29.4	-2.3%	141.4	17.7x	2.4x
BDFINANCE	12.0	+2.6%	17.5	NM	NM	RENATA	32,968	2.3%	20.0x	1.6x	SONALIPAPR	264.1	-4.2%	138.1	25.6x	1.6x
HWAWELLTEX	50.0	+2.5%	16.8	13.9x	1.3x	BXPHARMA	23,409	1.7%	8.2x	1.1x	ASIATICLAB	63.2	+1.9%	137.6	26.2x	1.2x
INTECH	35.5	+2.3%	53.9	NM	NM	PUBALIBANK	22,905	1.6%	5.2x	0.7x	UCB	11.1	+5.7%	121.9	4.4x	0.4x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.6x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CAPMBDBLMF	10.3	-8.8%	17.0	NM	1.2x	LHB	20,953	1.5%	16.6x	3.3x	BRACBANK	74.0	68.0	4.0	2,283	161.02
PRIMEFIN	2.1	-8.7%	2.7	NM	0x	OLYMPIC	20,496	1.5%	17.3x	2.6x	KBPPWBIL	149.0	145.5	9.0	339	49.91
PLFSL	1.1	-8.3%	0.5	NM	NM	ALARABANK	18,282	1.3%	37.3x	0.8x	ASIATICLAB	62.0	60.0	3.0	508	30.50
FIRSTFIN	2.4	-7.7%	0.0	NM	NM	BEACONPHAR	17,838	1.3%	34.2x	4.6x	FINEFOODS	290.0	285.0	3.0	67	19.18
BAYLEASING	4.1	-6.8%	0.6	NM	NM	PRIMEBANK	16,142	1.1%	3.8x	0.8x	ISNLTD	119.6	119.6	1.0	59	7.00
SIBL	4.1	-6.8%	4.5	NM	0.3x	ROBI	14,876	1.1%	17.7x	2.4x	PTL	60.3	59.5	2.0	63	3.77
ACMEPL	16.4	-6.3%	117.2	NM	1.0x	UTTARABANK	13,699	1.0%	NM	0.8x	EHL	93.0	93.0	1.0	40	3.72
PREMIERLEA	1.5	-6.3%	0.3	NM	NM	NBL	13,055	0.9%	NM	NM	UCB	9.6	9.6	1.0	325	3.12
ILFSL	1.6	-5.9%	0.3	NM	NM	BSRMLTD	12,852	0.9%	5.1x	0.5x	AMANFEED	26.4	26.4	1.0	94	2.48
GBBPOWER	6.9	-5.5%	1.2	18.6x	0.3x	* 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					ACIFORMULA	154.8	154.8	2.0	15	2.32

* 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
BRACBANK	74.0	68.0	161.0	2,283	4
KBPPWBIL	149.0	145.5	49.9	339	9
ASIATICLAB	62.0	60.0	30.5	508	3
FINEFOODS	290.0	285.0	19.2	67	3
ISNLTD	119.6	119.6	7.0	59	1
PTL	60.3	59.5	3.8	63	2
EHL	93.0	93.0	3.7	40	1
UCB	9.6	9.6	3.1	325	1
AMANFEED	26.4	26.4	2.5	94	1
ACIFORMULA	154.8	154.8	2.3	15	2
RANFOUNDRY	186.0	186.0	1.8	10	1
SINOBANGLA	60.0	58.0	1.5	25	2
MEGHNACEM	53.0	53.0	1.3	25	1
SIPLC	52.7	52.7	1.2	22	1
GQBALLPEN	525.0	525.0	1.1	2	1
AL-HAJTEX	174.0	174.0	1.0	6	2
MJLBD	103.0	103.0	1.0	10	1
HAKKANIPUL	80.5	80.5	1.0	12	1
MONNOCERA	94.0	94.0	0.9	10	1
ORIONINFU	500.1	500.1	0.8	2	1
EXIM1STMF	4.1	4.1	0.7	168	1
MONNOAGML	416.0	416.0	0.7	2	1
Total			300.5		49

Important DSE News
RENATA

The company has informed that it has successfully shipped its Rivaroxaban Capsules (15 mg and 20 mg) to Australia, marking the first availability of this important anticoagulant in capsule form in that market. The product has been manufactured at TGA-approved facility, underscoring Renata's commitment to meeting stringent global regulatory standards. This achievement not only broadens patient treatment options in Australia but also reflects Renata's steady progress in expanding its international footprint.

BPML

The company has informed that the registered office address of the company has been changed. The updated registered office address is as follows: Tower-1, Plot-844, Road-12, Block-I, Bashundhara R/A, Dhaka-1229.

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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