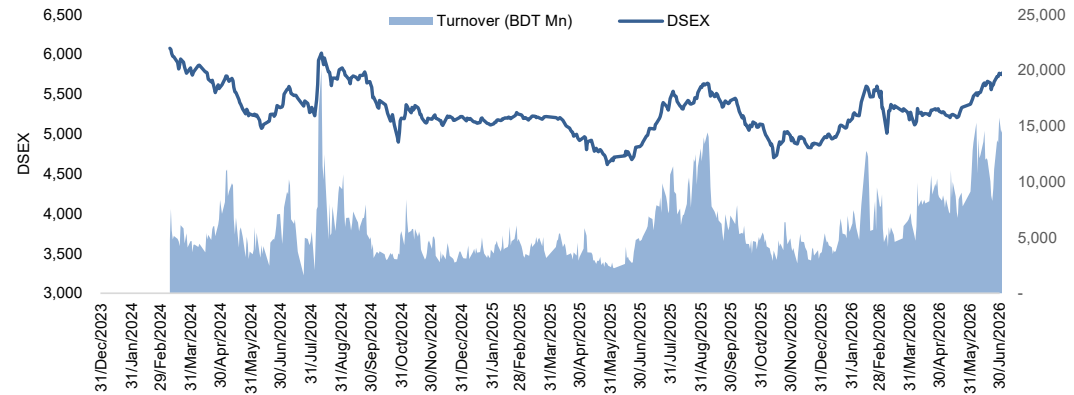


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.75%) lost 41.71 points and closed at 5,550.50. The blue-chip index DS30 (-0.72%), the Shariah-based index DSES (-1.05%), and the large-cap index CDSET (-0.60%) closed at 2,105.92, 1,107.00, and 1,110.24 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 2.08% followed by NBF1 (-1.13%), Fuel & Power (-0.78%), Food & Allied (-0.76%), Telecommunication (-0.56%), Pharmaceutical (-0.53%), and Bank (-0.44%), respectively. Block trades contributed 4.7% of the overall market turnover. Eastern Bank PLC. (+0.4%) was the most traded share with a turnover of BDT 277 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,550.50	5,592.21	-41.71	-0.75%	+14.1%
DS30	2,105.92	2,121.18	-15.26	-0.72%	+13.6%
DSES	1,107.00	1,118.74	-11.74	-1.05%	+10.6%
CDSET	1,110.24	1,116.97	-6.73	-0.60%	+10.5%

	Advanced	Declined	Unchanged	Total
All Category	100	254	32	386
A Category (Equity)	72	110	12	194
B Category (Equity)	10	63	1	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	18	81	19	118
Mutual Funds	24	2	7	33
Corporate Bonds	1	2	0	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,929,002	6,945,548	-0.2%
	Mn USD	56,493	56,627	
Turnover	Mn BDT	7,887	7,474	+5.5%
	Mn USD	64	61	
Volume	Mn Shares	295	278	+6.2%
No. of Trade		220,637	201,639	+9.4%

* Average Interbank Exchange Rate is BDT 122.65 as of Sep 21, 2026

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Figure: Sectorial Turnover (BDT Mn)

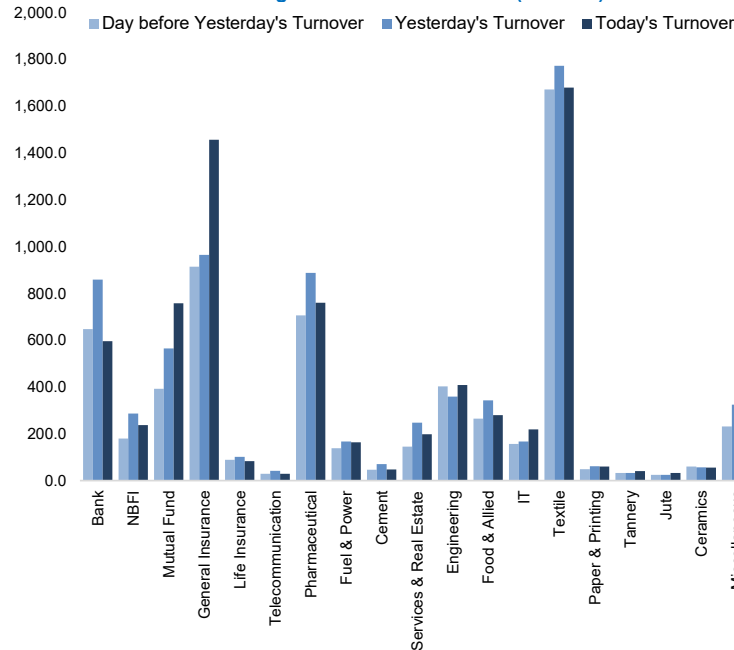
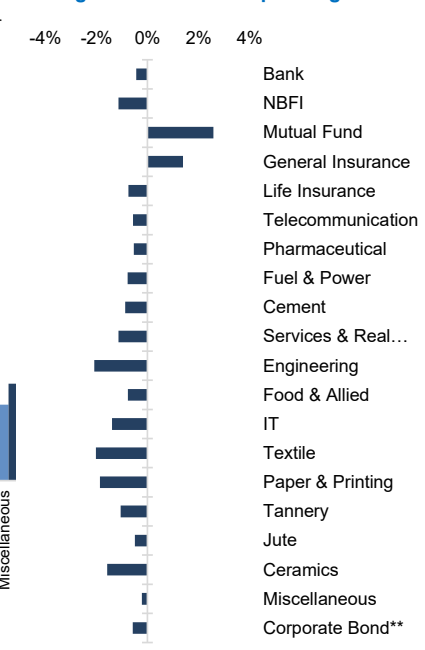


Figure: Sectorial Mcap Change



Market PE 13.1x

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	1,554	1,561	-6.89	-0.44%	36	740,575	10.7%	595.9	7.9%	7.3x	0.7x	GP	326,638	9.3%	10.3	9.3x	5.8x
NBFI	1,091	1,104	-12.46	-1.13%	23	103,795	1.5%	237.2	3.2%	NM	1.1x	SQURPHARMA	191,296	5.5%	33.2	7.4x	1.3x
Mutual Fund	690	672	+17.35	+2.58%	34	32,093	0.5%	758.1	10.1%	NM	0.6x	ROBI	157,138	4.5%	18.1	15.0x	2.4x
General Insurance	4,507	4,445	+61.81	+1.39%	43	127,340	1.8%	1,455.9	19.4%	18.8x	1.7x	BRACBANK	145,387	4.1%	55.8	6.4x	1.3x
Life Insurance	1,686	1,698	-12.66	-0.75%	15	47,512	0.7%	83.5	1.1%	NM	NM	WALTONHIL	127,337	3.6%	44.5	11.3x	1.0x
Telecommunication	4,409	4,434	-24.81	-0.56%	3	511,626	7.4%	29.4	0.4%	10.6x	3.7x	BATBC	123,228	3.5%	25.4	21.2x	2.1x
Pharmaceutical	3,073	3,089	-16.38	-0.53%	34	580,061	8.4%	760.0	10.1%	10.6x	1.5x	MARICO	83,607	2.4%	6.8	7.4x	18.2x
Fuel & Power	1,097	1,106	-8.58	-0.78%	23	289,654	4.2%	163.9	2.2%	9.3x	0.6x	BERGERPBL	71,881	2.1%	6.3	15.4x	3.3x
Cement	2,002	2,019	-17.53	-0.87%	7	94,184	1.4%	47.7	0.6%	21.9x	2.1x	UPGDCL	66,839	1.9%	3.1	7.2x	1.4x
Services & Real Estate	1,147	1,160	-13.19	-1.14%	9	62,427	0.9%	198.5	2.6%	25.4x	0.5x	BXPHARMA	65,311	1.9%	68.0	7.6x	1.1x
Engineering	2,577	2,631	-54.66	-2.08%	42	288,827	4.2%	408.3	5.4%	15.2x	0.8x	PUBALIBANK	62,313	1.8%	29.7	5.2x	0.8x
Food & Allied	12,336	12,430	-94.48	-0.76%	21	225,199	3.2%	279.3	3.7%	33.0x	3.3x	CITYBANK	52,307	1.5%	20.3	3.4x	0.8x
IT	2,395	2,428	-33.73	-1.39%	11	31,710	0.5%	218.8	2.9%	51.6x	2.0x	RENATA	51,418	1.5%	11.2	18.8x	1.4x
Textile	1,378	1,407	-28.39	-2.02%	58	143,376	2.1%	1,678.8	22.3%	NM	1.0x	DUTCHBANGL	46,996	1.3%	8.1	3.6x	0.8x
Paper & Printing	4,399	4,483	-83.50	-1.86%	6	20,604	0.3%	60.1	0.8%	NM	1.4x	ISLAMIBANK	43,309	1.2%	1.3	NM	0.7x
Tannery	2,092	2,114	-22.20	-1.05%	6	24,293	0.4%	40.8	0.5%	NM	1.5x	UNILEVERCL	38,300	1.1%	0.3	62.6x	23.5x
Jute	13,123	13,188	-64.64	-0.49%	3	2,862	0.0%	32.9	0.4%	NM	1.8x	EBL	37,805	1.1%	277.1	4.2x	0.7x
Ceramics	445	452	-7.14	-1.58%	5	20,093	0.3%	55.6	0.7%	NM	1.3x	ICB	34,864	1.0%	2.1	NM	1.3x
Miscellaneous	2,489	2,494	-5.30	-0.21%	15	135,139	1.9%	414.2	5.5%	38.7x	1.0x	POWERGRID	34,542	1.0%	0.8	8.5x	0.3x
Corporate Bond**	18,216	18,321	-105.49	-0.58%	16	40,300	0.6%	0.9	0.0%	NM	NM	PRIMEBANK	34,365	1.0%	19.2	3.7x	0.7x
Treasury Bond**	2,221	2,216	+5.43	+0.24%	232	3,411,672	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
ICBAMCL2ND	8.8	+10.0%	41.5	NM	0.9x	SQURPHARMA	106,839	7.2%	7.4x	1.3x	EBL	23.0	+0.4%	277.1	4.2x	0.7x
CRYSTALINS	68.4	+10.0%	23.7	19.5x	2.4x	BRACBANK	78,262	5.3%	6.4x	1.3x	SHARPIND	19.6	-3.4%	263.7	NM	2.5x
1STPRIMFMF	28.4	+9.7%	75.5	NM	2.9x	BXPHARMA	45,633	3.1%	7.6x	1.1x	ENVOYTEX	72.3	-	194.2	8.7x	1.2x
ORIONINFU	252.6	+8.7%	172.9	NM	15.6x	ISLAMIBANK	43,231	2.9%	NM	0.7x	IPDC	33.5	-0.6%	176.3	28.1x	2.0x
DGIC	35.7	+8.5%	108.7	67.4x	3.0x	PUBALIBANK	42,454	2.9%	5.2x	0.8x	ORIONINFU	252.6	+8.7%	172.9	NM	15.6x
LRGLOBMF1	4.7	+6.82%	9.2	NM	0.5x	WALTONHIL	41,907	2.8%	11.3x	1.0x	BEXIMCO	22.4	+3.2%	169.2	NM	0.3x
1JANATAMF	3.7	+5.7%	20.9	NM	0x	CITYBANK	36,422	2.5%	3.4x	0.8x	BNICL	153.7	+2.5%	163.3	26.6x	4.5x
AGRANINS	29.3	+5.4%	7.8	18.9x	1.5x	GP	32,664	2.2%	9.3x	5.8x	FEKDIL	22.2	-3.9%	160.6	NM	1.2x
ICBSONALI1	8.2	+5.1%	93.9	NM	0.9x	BATBC	32,594	2.2%	21.2x	2.1x	PTL	76.5	-1.5%	160.2	12.1x	1.6x
PREMIERLEA	2.1	+5.0%	0.6	NM	NM	EBL	25,919	1.8%	4.2x	0.7x	RELIANCINS	108.4	-3.8%	160.0	11.4x	1.3x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,046	1.7%	18.8x	1.4x	Block Trade					
ANLIMAYARN	26.4	-5.4%	0.8	NM	9.3x	LHB	22,832	1.5%	12.7x	3.4x	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)	
PLFSL	1.8	-5.3%	1.2	NM	NM	PRIMEBANK	21,468	1.5%	3.7x	0.7x	GQBALLPEN	582.0	551.0	17.0	139	78.83
SAMATALETH	79.8	-4.7%	16.3	NM	2.8x	UCB	18,611	1.3%	3.8x	0.5x	SAMORITA	106.1	106.1	4.0	700	74.27
NAHEEACP	34.1	-4.7%	16.3	NM	2.8x	OLYMPIC	18,129	1.2%	15.3x	2.2x	SONARGAON	114.6	97.0	3.0	755	73.27
MEGCONMILK	32.8	-4.7%	2.7	NM	NM	UTTARABANK	17,441	1.2%	NM	0.8x	FINEFOODS	478.5	425.0	2.0	97	46.26
DSHGARME	148.3	-4.5%	17.2	NM	0.9x	ROBI	15,714	1.1%	15.0x	2.4x	APEXSPINN	322.0	320.0	3.0	46	14.93
MATINSPINN	60.5	-4.4%	42.3	13.8x	0.9x	BSRMLTD	15,268	1.0%	4.4x	0.5x	ENVOYTEX	79.0	70.0	3.0	181	12.91
SILCOPHL	17.5	-4.4%	13.7	53.0x	0.8x	ALARABANK	15,154	1.0%	19.9x	0.7x	SQURPHARMA	216.6	216.6	2.0	50	10.83
RSRMSTEEL	6.7	-4.3%	0.3	NM	0.1x	BEXIMCO	14,133	1.0%	NM	0.3x	DGIC	32.8	30.0	8.0	335	10.82
BAYLEASING	4.5	-4.3%	0.6	NM	NM	* 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										
											DAFODILCOM	161.8	161.6	7.0	53	8.56
											BNICL	150.0	146.0	4.0	53	7.91

*. 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	Important DSE News
GQBALLPEN	582.0	551.0	78.8	139	17	
SAMORITA	106.1	106.1	74.3	700	4	
SONARGAON	114.6	97.0	73.3	755	3	
FINEFOODS	478.5	425.0	46.3	97	2	
APEXSPINN	322.0	320.0	14.9	46	3	
ENVOYTEX	79.0	70.0	12.9	181	3	
SQURPHARMA	216.6	216.6	10.8	50	2	
DGIC	32.8	30.0	10.8	335	8	
DAFODILCOM	161.8	161.6	8.6	53	7	
BNICL	150.0	146.0	7.9	53	4	
KARNAPHULI	58.9	58.9	6.4	109	1	
SONARBAINS	34.6	34.6	6.4	185	1	
CITYBANK	27.2	27.2	4.1	150	1	
CITYGENINS	127.6	120.0	2.7	22	3	
CAPITECGBF	8.0	8.0	1.6	200	1	
PEOPLESINS	66.1	66.0	1.1	17	2	
GLDNJMF	8.2	8.2	1.1	130	1	
STANDARINS	55.8	55.8	1.0	19	1	
SAIHAMTEX	36.5	36.5	1.0	27	1	
RDFOOD	26.8	26.8	0.6	23	1	
PTL	85.4	85.4	0.6	7	1	
BRACBANK	70.4	70.4	0.6	8	1	
Total			367.3		71	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
AAMRANET		0.0%	0.1%	Record Date	24-Sep-26
GPHISPAT		0.0%	2.0%	Record Date	1-Oct-26
AAMRATECH		0.0%	0.3%	Record Date	6-Oct-26

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