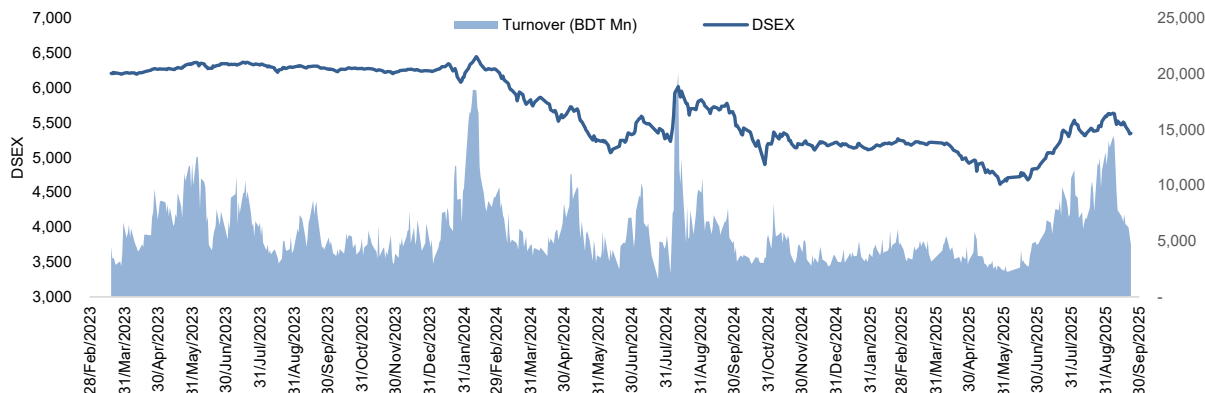


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.19%) gained 10.33 points and closed at 5,347.47. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (+0.16%), and the large-cap index CDSET (-0.12%) closed at 2,072.25, 1,152.07, and 1,089.20 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 1.29%, followed by Engineering (+0.75%), Fuel & Power (+0.43%), Pharmaceutical (-0.03%), Telecommunication (-0.04%), Food & Allied (-0.10%), and Bank (-0.50%), respectively. Block trades contributed 4.0% of the overall market turnover. Summit Alliance Port Limited (-2.0%) was the most traded share with a turnover of BDT 204 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,347.47	5,337.14	+10.33	+0.19%	+2.5%
DS30	2,072.25	2,071.57	+0.68	+0.03%	+6.8%
DSES	1,152.07	1,150.26	+1.81	+0.16%	-1.4%
CDSET	1,089.20	1,090.49	-1.29	-0.12%	+2.2%

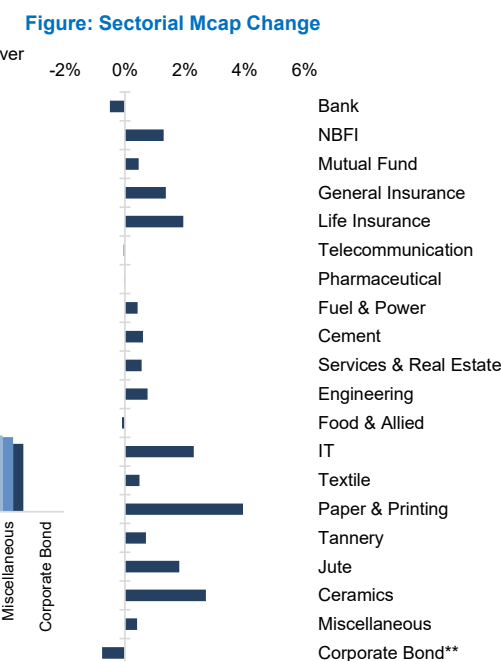
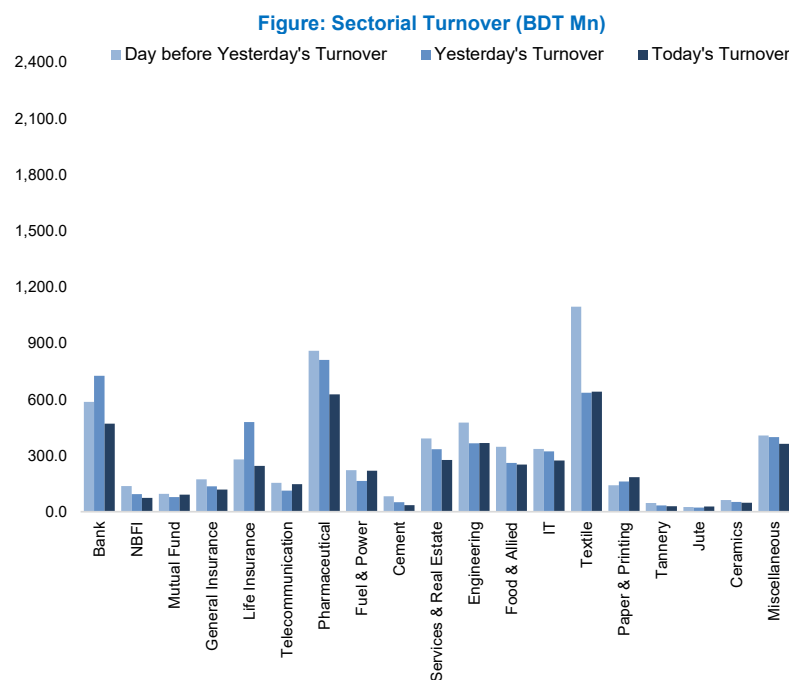
	Advanced	Declined	Unchanged	Total
All Category	233	101	61	395
A Category (Equity)	146	42	29	217
B Category (Equity)	63	8	9	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	24	51	23	98
Mutual Funds	14	7	15	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,169,145	7,181,647	-0.2%
	Mn USD	58,885	58,987	
Turnover	Mn BDT	4,676	5,448	-14.2%
	Mn USD	38	45	
Volume	Mn Shares	166	184	-9.5%
No. of Trade		157,386	169,565	-7.2%

\* Average Interbank Exchange Rate is BDT 121.75 as of Sep 23, 2025

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Market PE 16.2x

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	1,463	1,471	-7.39	-0.50%	36	692,460	9.6%	469.5	10.5%	NM	0.8x	GP	403,065	11.2%	25.4	13.7x	7.1x
NBFI	1,075	1,062	+13.71	+1.29%	23	102,472	1.4%	73.2	1.6%	NM	NM	SQURPHARMA	193,512	5.4%	48.8	8.2x	1.4x
Mutual Fund	557	554	+2.53	+0.46%	37	26,676	0.4%	91.4	2.0%	NM	0.5x	ROBI	152,948	4.2%	80.6	17.6x	2.4x
General Insurance	2,819	2,781	+37.90	+1.36%	43	80,449	1.1%	118.7	2.6%	13.5x	1.2x	BATBC	150,498	4.2%	18.8	12.1x	2.8x
Life Insurance	2,012	1,973	+38.56	+1.95%	15	53,500	0.7%	245.1	5.5%	NM	NM	WALTONHIL	143,558	4.0%	23.7	13.8x	1.2x
Telecommunication	4,960	4,962	-1.99	-0.04%	3	581,580	8.1%	146.9	3.3%	14.5x	4.2x	BRACBANK	139,166	3.9%	23.2	9.8x	1.6x
Pharmaceutical	3,067	3,068	-0.77	-0.03%	34	581,441	8.1%	626.1	13.9%	13.3x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,162	1,157	+4.95	+0.43%	23	307,701	4.3%	219.0	4.9%	19.4x	0.7x	MARICO	88,493	2.5%	2.2	14.4x	26.5x
Cement	2,004	1,992	+11.94	+0.60%	7	95,499	1.3%	34.4	0.8%	22.0x	2.1x	UPGDCL	82,838	2.3%	5.5	7.1x	2.0x
Services & Real Estate	1,080	1,074	+5.97	+0.56%	9	59,419	0.8%	276.1	6.2%	26.3x	0.4x	BERGERPBL	70,177	1.9%	3.4	20.0x	4.1x
Engineering	2,587	2,567	+19.38	+0.75%	42	291,810	4.1%	366.8	8.2%	15.6x	0.9x	LHB	61,088	1.7%	19.2	16.3x	3.2x
Food & Allied	14,487	14,501	-14.43	-0.10%	21	265,067	3.7%	252.4	5.6%	20.1x	4.2x	RENATA	55,146	1.5%	8.4	19.6x	1.6x
IT	2,045	1,999	+45.93	+2.30%	11	26,968	0.4%	273.4	6.1%	22.7x	1.7x	BXPHARMA	51,214	1.4%	27.6	8.0x	1.0x
Textile	1,210	1,205	+5.90	+0.49%	58	126,059	1.8%	640.5	14.3%	NM	0.8x	UNILEVERCL	46,264	1.3%	0.4	72.8x	25.4x
Paper & Printing	5,332	5,130	+202.26	+3.94%	6	24,089	0.3%	185.0	4.1%	NM	1.1x	ICB	44,143	1.2%	5.5	NM	1.0x
Tannery	2,072	2,057	+14.44	+0.70%	6	23,081	0.3%	28.7	0.6%	NM	1.7x	EBL	39,895	1.1%	10.2	5.7x	0.9x
Jute	13,593	13,351	+242.01	+1.81%	3	2,992	0.0%	27.8	0.6%	NM	NM	DUTCHBANGL	39,151	1.1%	9.3	10.4x	0.8x
Ceramics	428	416	+11.27	+2.71%	5	19,185	0.3%	48.8	1.1%	NM	1.2x	CITYBANK	37,726	1.0%	36.2	3.5x	0.7x
Miscellaneous	4,151	4,135	+16.60	+0.40%	15	225,427	3.1%	362.1	8.1%	89.3x	1.8x	PUBALIBANK	36,961	1.0%	16.5	5.0x	0.6x
Corporate Bond**	16,664	16,792	-128.18	-0.76%	16	36,790	0.5%	3.0	0.1%	NM	NM	PRIMEBANK	32,729	0.9%	2.2	3.9x	0.8x
Treasury Bond**	2,316	2,328	-11.61	-0.50%	235	3,553,623	49.5%	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
CAPMBDBLMF	11.3	+9.7%	21.5	NM	1.3x	SQURPHARMA	108,958	7.7%	8.2x	1.4x	SAPORTL	38.9	-2.0%	204.0	14.5x	1.1x
PLFSL	1.2	+9.1%	0.6	NM	NM	ISLAMIBANK	74,730	5.3%	NM	0.9x	KBPPWBIL	152.7	+1.7%	200.5	NM	12.8x
CROWNCEMNT	58.0	+8.8%	5.2	13.2x	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	FEKDIL	20.6	+4.0%	132.6	9.8x	1.0x
HAMI	124.0	+8.7%	14.6	NM	13.6x	BATBC	50,233	3.6%	12.1x	2.8x	SONALIPAPR	269.5	+8.1%	115.4	26.1x	1.6x
SALVOCHEM	34.6	+8.5%	112.5	59.7x	2.1x	WALTONHIL	46,773	3.3%	13.8x	1.2x	SALVOCHEM	34.6	+8.5%	112.5	59.7x	2.1x
GENEXIL	26.3	+8.23%	19.9	12.2x	1.2x	BRACBANK	46,489	3.3%	9.8x	1.6x	ORIONINFU	505.8	+1.0%	93.8	NM	32.2x
SONALIPAPR	269.5	+8.1%	115.4	26.1x	2x	GP	44,708	3.2%	13.7x	7.1x	CVOPRL	172.1	+5.0%	88.4	64.2x	14.5x
GQBALLPEN	546.6	+7.5%	43.3	NM	4.0x	RENATA	32,968	2.3%	19.6x	1.6x	ISNLTD	103.6	+2.5%	87.0	NM	37.7x
TAMIJTEX	147.4	+6.5%	13.5	21.8x	1.5x	BXPHARMA	23,409	1.7%	8.0x	1.0x	ASIATICLAB	57.7	-2.0%	84.0	23.9x	1.1x
KAY&QUE	369.3	+5.7%	50.3	NM	3.8x	PUBALIBANK	22,905	1.6%	5.0x	0.6x	ROBI	29.2	+1.4%	80.6	17.6x	2.4x
						CITYBANK	21,020	1.5%	3.5x	0.7x						
						LHB	20,953	1.5%	16.3x	3.2x						
						OLYMPIC	20,496	1.5%	16.9x	2.6x						
						ALARABANK	18,282	1.3%	36.7x	0.8x						
						BEACONPHAR	17,838	1.3%	33.0x	4.4x						
						PRIMEBANK	16,142	1.1%	3.9x	0.8x						
						ROBI	14,876	1.1%	17.6x	2.4x						
						UTTARABANK	13,699	1.0%	NM	0.8x						
						NBL	13,055	0.9%	NM	NM						
						BSRMLTD	12,852	0.9%	5.1x	0.5x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
HFL	7.2	-10.0%	1.6	NM	0.2x											
ZAHEENSPIN	5.6	-9.7%	3.1	NM	2x											
EXIMBANK	2.9	-9.4%	13.2	NM	0.1x											
BARKAPOWER	9.0	-9.1%	2.3	42.9x	0.4x											
SIBL	3.3	-8.3%	3.2	NM	0.2x											
FAREASTFIN	1.2	-7.7%	0.5	NM	NM											
GSPFINANCE	2.5	-7.4%	0.5	NM	NM											
KPCL	10.2	-7.3%	4.6	30.0x	0.5x											
KPPL	13.1	-7.1%	7.6	NM	NM											
ILFSL	1.4	-6.7%	0.1	NM	NM											

\* 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	302.2	280.0	89.4	315	22
LOVELLO	101.0	85.0	18.2	182	6
BRACBANK	71.4	71.4	10.6	149	1
SQURPHARMA	220.7	220.7	10.4	47	1
ASIATICLAB	57.0	57.0	8.2	143	2
PTL	60.6	55.0	6.9	119	5
CITYGENINS	62.5	60.1	5.6	90	2
ORIONINFU	490.0	485.0	5.1	10	5
UTTARABANK	23.4	23.4	4.7	200	1
GQBALLPEN	471.0	471.0	4.2	9	1
CAPMBDBLMF	10.6	10.1	3.1	300	2
SALVOCHEM	33.0	33.0	2.5	75	1
KAY&QUE	355.4	355.4	2.4	7	1
AL-HAJTEX	158.0	158.0	2.4	15	2
SHYAMPSUG	194.1	194.1	2.4	12	3
BPML	37.7	37.7	2.0	54	1
RANFOUNDRY	169.0	169.0	1.3	8	2
AMANFEED	25.4	25.4	1.1	44	1
BEACONPHAR	134.0	132.0	1.1	8	2
CLICL	54.0	54.0	1.1	20	2
MONNOFABR	17.4	17.4	0.9	50	1
SEAPEARL	50.8	50.8	0.7	13	1
<b>Total</b>			<b>187.0</b>		<b>70</b>

#### Important DSE News

##### GREENDELT

Mr. Syed Moazzem Hussain, a sponsor shareholder of the company, has informed that he will receive 262,355 shares of the company from his wife Late Halima Hussain by way of nomination.

##### BSCPLC

The Board of Directors has recommended 40% Cash Dividend (Taka 4.00 per share) for the year ended June 30, 2025. Date of AGM: 23.11.2025; Time: 11:00 AM; Venue: Virtual meeting through digital platform. Record Date: 22.10.2025. The Company has also reported EPS of Tk. 11.01 (Basic), Diluted EPS of Tk. 9.93, NAV per share of Tk. 90.99 and NOCFPS of Tk. 13.75 for the year ended June 30, 2025 as against Tk. 9.78 (restated), Tk. 9.02, Tk. 93.06 and Tk. 17.63 respectively for the year ended June 30, 2024.

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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