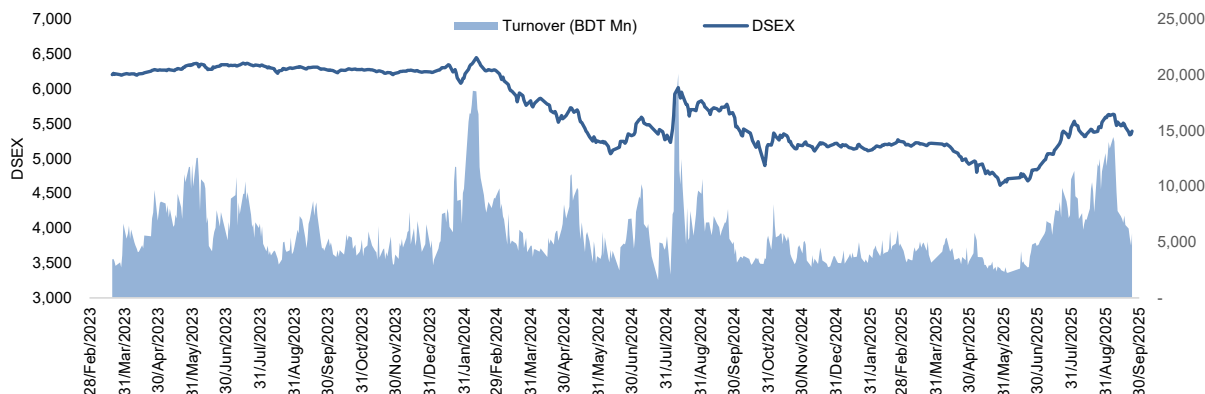


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.84%) gained 45.18 points and closed at 5,392.65. The blue-chip index DS30 (+0.92%), the Shariah-based index DSES (+1.17%), and the large-cap index CDSET (+0.49%) closed at 2,091.25, 1,165.51, and 1,094.52 points, respectively. All large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.20% followed by Fuel & Power (+1.08%), Engineering (+0.77%), Pharmaceutical (+0.64%), Telecommunication (+0.52%), Food & Allied (+0.28%), and Bank (+0.09%), respectively. Block trades contributed 2.0% of the overall market turnover. Orion Infusion Ltd. (+2.3%) was the most traded share with a turnover of BDT 235 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,392.65	5,347.47	+45.18	+0.84%	+3.4%
DS30	2,091.25	2,072.25	+19.00	+0.92%	+7.8%
DSES	1,165.51	1,152.07	+13.44	+1.17%	-0.3%
CDSET	1,094.52	1,089.20	+5.32	+0.49%	+2.7%

	Advanced	Declined	Unchanged	Total
All Category	289	60	48	397
A Category (Equity)	161	27	31	219
B Category (Equity)	71	4	5	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	57	29	12	98
Mutual Funds	13	1	22	36
Corporate Bonds	0	2	1	3
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,227,186	7,169,145	+0.8%
	Mn USD	59,361	58,884	
Turnover	Mn BDT	5,760	4,676	+23.2%
	Mn USD	47	38	
Volume	Mn Shares	200	166	+20.3%
No. of Trade		183,414	157,386	+16.5%

\* Average Interbank Exchange Rate is BDT 121.75 as of Sep 24, 2025

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Figure: Sectorial Turnover (BDT Mn)

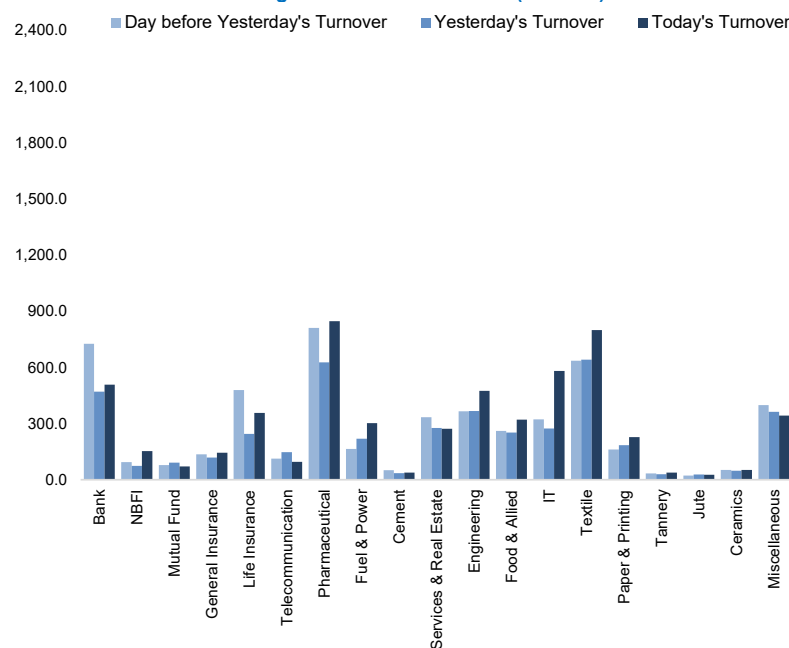
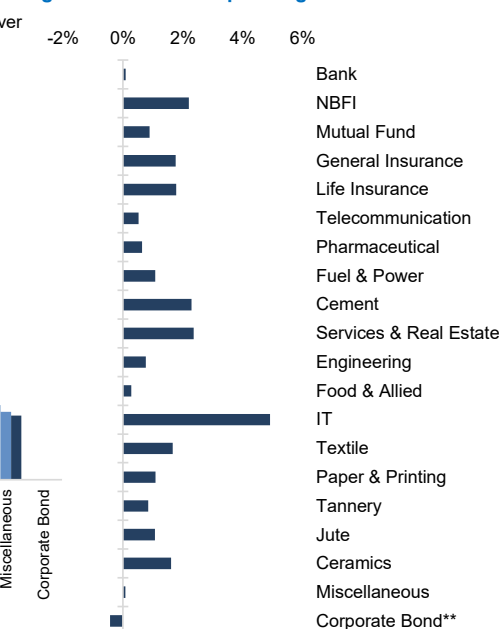


Figure: Sectorial Mcap Change



Market PE 16.3x

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	1,465	1,463	+1.35	+0.09%	36	693,098	9.6%	507.1	9.0%	NM	0.8x	GP	403,740	11.1%	10.0	13.7x	7.1x
NBFI	1,099	1,075	+23.66	+2.20%	23	104,727	1.4%	152.8	2.7%	NM	NM	SQURPHARMA	193,424	5.3%	40.2	8.2x	1.4x
Mutual Fund	562	557	+4.98	+0.89%	37	26,915	0.4%	70.5	1.2%	NM	0.5x	ROBI	155,043	4.3%	70.4	17.8x	2.4x
General Insurance	2,869	2,819	+49.66	+1.76%	43	81,866	1.1%	144.4	2.6%	13.8x	1.2x	BATBC	150,876	4.2%	31.8	12.2x	2.8x
Life Insurance	2,047	2,012	+35.85	+1.78%	15	54,454	0.8%	356.8	6.3%	NM	NM	WALTONHIL	143,315	3.9%	33.0	13.8x	1.2x
Telecommunication	4,986	4,960	+25.86	+0.52%	3	584,613	8.1%	95.1	1.7%	14.6x	4.2x	BRACBANK	138,768	3.8%	48.3	9.8x	1.6x
Pharmaceutical	3,087	3,067	+19.73	+0.64%	34	585,183	8.1%	845.9	15.0%	13.4x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,174	1,162	+12.51	+1.08%	23	311,013	4.3%	302.3	5.4%	19.7x	0.7x	MARICO	87,602	2.4%	24.2	14.3x	26.3x
Cement	2,050	2,004	+45.99	+2.29%	7	97,691	1.4%	38.4	0.7%	22.5x	2.2x	UPGDCL	83,360	2.3%	4.0	7.2x	2.0x
Services & Real Estate	1,106	1,080	+25.52	+2.36%	9	60,823	0.8%	271.5	4.8%	26.9x	0.5x	BERGERPBL	69,485	1.9%	14.3	19.8x	4.0x
Engineering	2,607	2,587	+19.82	+0.77%	42	294,046	4.1%	474.6	8.4%	15.8x	0.9x	LHB	62,946	1.7%	24.6	16.8x	3.3x
Food & Allied	14,527	14,487	+40.69	+0.28%	21	265,812	3.7%	321.6	5.7%	20.1x	4.2x	RENATA	55,330	1.5%	10.7	19.7x	1.6x
IT	2,145	2,045	+100.57	+4.92%	11	28,295	0.4%	580.4	10.3%	23.8x	1.8x	BXPHARMA	52,463	1.4%	27.5	8.2x	1.1x
Textile	1,231	1,210	+20.17	+1.67%	58	128,159	1.8%	798.6	14.1%	NM	0.9x	UNILEVERCL	46,033	1.3%	0.6	72.5x	25.2x
Paper & Printing	5,390	5,332	+58.01	+1.09%	6	24,351	0.3%	228.0	4.0%	NM	1.2x	ICB	44,837	1.2%	5.8	NM	1.1x
Tannery	2,089	2,072	+17.58	+0.85%	6	23,277	0.3%	37.5	0.7%	NM	1.7x	EBL	39,895	1.1%	15.2	5.7x	0.9x
Jute	13,738	13,593	+145.69	+1.07%	3	3,024	0.0%	26.0	0.5%	NM	NM	DUTCHBANGL	39,441	1.1%	6.3	10.5x	0.8x
Ceramics	435	428	+6.89	+1.61%	5	19,494	0.3%	52.8	0.9%	NM	1.3x	CITYBANK	38,335	1.1%	38.2	3.5x	0.7x
Miscellaneous	4,155	4,151	+3.40	+0.08%	15	225,612	3.1%	342.0	6.1%	89.4x	1.8x	PUBALIBANK	37,091	1.0%	4.8	5.1x	0.6x
Corporate Bond**	16,593	16,664	-71.38	-0.43%	16	36,633	0.5%	1.1	0.0%	NM	NM	PRIMEBANK	32,961	0.9%	7.7	3.9x	0.8x
Treasury Bond**	2,338	2,316	+22.03	+0.95%	235	3,585,033	49.6%	0.1	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
INTECH	36.6	+9.9%	81.7	NM	NM	SQURPHARMA	108,958	7.7%	8.2x	1.4x	ORIONINFU	517.3	+2.3%	234.5	NM	32.9x
MIRACLEIND	33.9	+9.7%	2.0	NM	1.8x	ISLAMIBANK	74,730	5.3%	NM	0.9x	KBPPWBIL	153.9	+0.8%	185.7	NM	12.9x
MITHUNKNIT	16.3	+9.4%	1.4	NM	5.1x	BEXIMCO	69,463	4.9%	NM	1.3x	SAPORTL	41.2	+5.9%	171.1	15.3x	1.2x
YPL	17.8	+9.2%	7.1	NM	3.3x	BATBC	50,233	3.6%	12.2x	2.8x	FEKDIL	20.9	+1.5%	166.1	10.0x	1.0x
GENEXIL	28.6	+8.7%	75.4	13.2x	1.3x	WALTONHIL	46,773	3.3%	13.8x	1.2x	SONALIPAPR	272.6	+1.2%	150.6	26.4x	1.6x
DOMINAGE	18.8	+8.05%	84.5	NM	1.1x	BRACBANK	46,489	3.3%	9.8x	1.6x	ISNLTD	111.6	+7.7%	132.5	NM	40.6x
ISNLTD	111.6	+7.7%	132.5	NM	41x	GP	44,708	3.2%	13.7x	7.1x	RUPALILIFE	108.9	+1.0%	127.6	NM	NM
MONNOFABR	21.0	+7.7%	47.7	NM	0.8x	RENATA	32,968	2.3%	19.7x	1.6x	CVOPRL	176.4	+2.5%	109.0	65.8x	14.9x
IPDC	22.5	+7.1%	76.4	22.6x	1.3x	BXPHARMA	23,409	1.7%	8.2x	1.1x	EGEN	28.6	+7.1%	98.9	35.8x	1.2x
EGEN	28.6	+7.1%	98.9	35.8x	1.2x	PUBALIBANK	22,905	1.6%	5.1x	0.6x	TILIL	59.0	+2.3%	97.3	11.7x	NM
						CITYBANK	21,020	1.5%	3.5x	0.7x						
						LHB	20,953	1.5%	16.8x	3.3x						
						OLYMPIC	20,496	1.5%	16.9x	2.6x						
						ALARABANK	18,282	1.3%	36.4x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
						BEACONPHAR	17,838	1.3%	33.8x	4.5x	SHYAMPSUG	194.3	194.1	19.0	93	18.04
						PRIMEBANK	16,142	1.1%	3.9x	0.8x	LOVELLO	101.5	100.9	5.0	172	17.39
						ROBI	14,876	1.1%	17.8x	2.4x	PTL	59.3	50.0	6.0	242	12.88
						UTTARABANK	13,699	1.0%	NM	0.8x	ORIONINFU	540.0	491.0	4.0	24	12.33
						NBL	13,055	0.9%	NM	NM	FINEFOODS	295.0	280.0	10.0	43	12.29
						BSRMLTD	12,852	0.9%	5.0x	0.5x	KOHINOOR	558.0	558.0	1.0	20	11.16
											UCB	9.5	9.5	1.0	400	3.80
											ISNLTD	102.0	98.0	3.0	37	3.76
											SAPORTL	40.0	40.0	1.0	70	2.80
											RELANCE1	14.3	13.2	4.0	200	2.78

\* 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
SHYAMPSUG	194.3	194.1	18.0	93	19
LOVELLO	101.5	100.9	17.4	172	5
PTL	59.3	50.0	12.9	242	6
ORIONINFU	540.0	491.0	12.3	24	4
FINEFOODS	295.0	280.0	12.3	43	10
KOHINOOR	558.0	558.0	11.2	20	1
UCB	9.5	9.5	3.8	400	1
ISNLTD	102.0	98.0	3.8	37	3
SAPORTL	40.0	40.0	2.8	70	1
RELIANCE1	14.3	13.2	2.8	200	4
SUNLIFEINS	59.0	59.0	2.4	42	1
AL-HAJTEX	170.0	162.0	2.1	13	3
FEKDIL	20.1	20.1	2.0	100	1
AMANFEED	26.0	26.0	1.3	50	1
AIL	49.1	49.1	1.2	25	1
DBH1STMF	6.0	6.0	1.2	200	2
IFIC	5.1	5.0	1.0	201	2
ACFL	19.1	19.1	0.9	49	1
SQURPHARMA	237.4	237.4	0.7	3	1
GQBALLPEN	530.0	530.0	0.6	1	1
ASIATICLAB	60.8	60.8	0.6	9	1
ACMEPL	16.0	16.0	0.5	32	1
<b>Total</b>			<b>112.8</b>		<b>72</b>

**Important DSE News**
**SOUTHEASTB**

Ms. Rehana Kashem, a Sponsor of the Company, has expressed her intention to sell 15,96,490 shares out of her holding of 63,24,027 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within October 30, 2025.

**MIRACLEIND**

Bangladesh Chemical Industries Corporation has issued a letter dated September 23, 2025 to Miracle Industries Ltd. which is translated (from Bengali to English) as follows: "In view of your letter No. 09-07-2025 regarding the above, it is hereby informed that the approval of the Ministry of Industries has been obtained for purchasing 50% of the total purchase of WPP+PE bags of BCIC through DPM from your company.

**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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