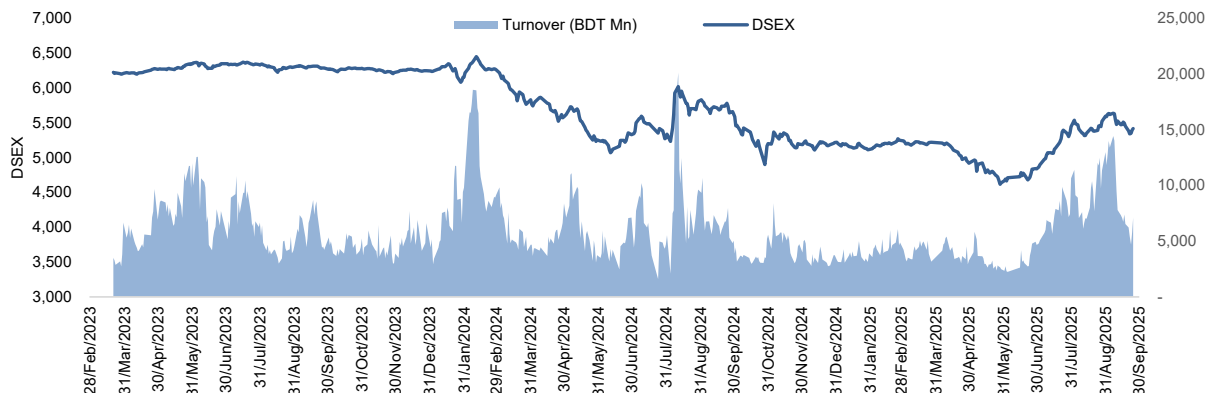


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.42%) gained 22.48 points and closed at 5,415.13. The blue-chip index DS30 (+0.56%), the Shariah-based index DSES (+0.51%), and the large-cap index CDSET (+0.37%) closed at 2,103.04, 1,171.47, and 1,098.60 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.63%, followed by Pharmaceutical (+0.59%), Food & Allied (+0.20%), Fuel & Power (-0.23%), Engineering (-0.43%), NBFI (-0.54%), and Telecommunication (-0.57%), respectively. Block trades contributed 3.8% of the overall market turnover. Summit Alliance Port Limited (-0.5%) was the most traded share with a turnover of BDT 358 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,415.13	5,392.65	+22.48	+0.42%	+3.8%
DS30	2,103.04	2,091.25	+11.79	+0.56%	+8.4%
DSES	1,171.47	1,165.51	+5.97	+0.51%	+0.2%
CDSET	1,098.60	1,094.52	+4.08	+0.37%	+3.0%

	Advanced	Declined	Unchanged	Total
All Category	175	157	66	398
A Category (Equity)	95	86	40	221
B Category (Equity)	26	47	7	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	54	24	19	97
Mutual Funds	5	9	21	35
Corporate Bonds	1	0	1	2
Treasury Bonds	1	2	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,234,487	7,227,186	+0.1%
	Mn USD	59,413	59,353	
Turnover	Mn BDT	7,089	5,760	+23.1%
	Mn USD	58	47	
Volume	Mn Shares	236	200	+17.9%
No. of Trade		201,661	183,414	+9.9%

* Average Interbank Exchange Rate is BDT 121.77 as of Sep 25, 2025

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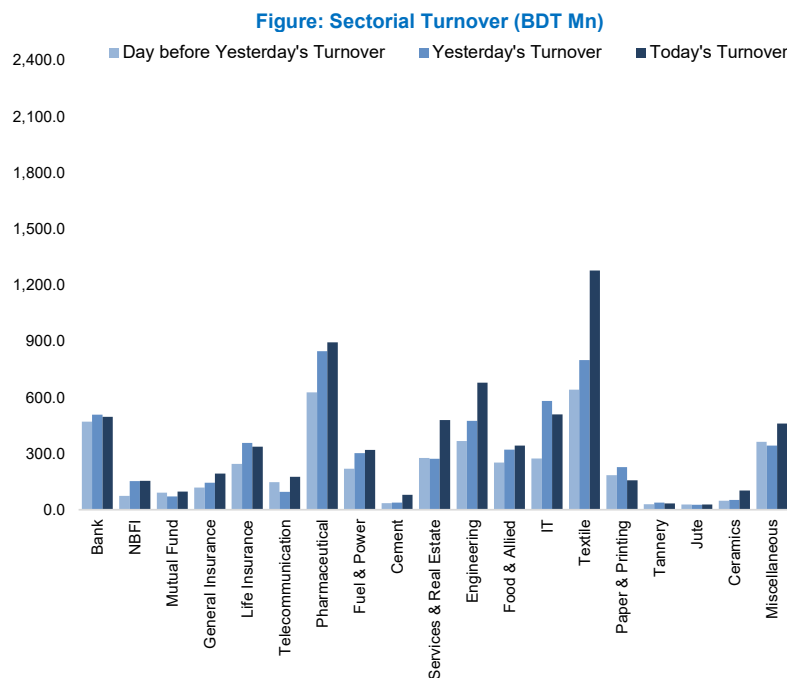
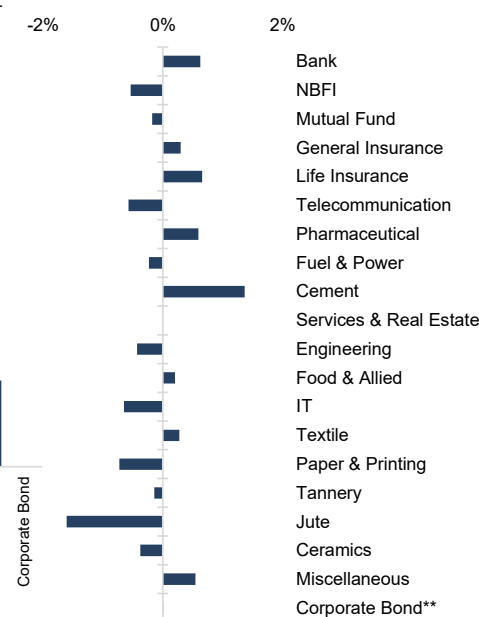


Figure: Sectorial Mcap Change



Market PE 16.4x

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	1,474	1,465	+9.19	+0.63%	36	697,446	9.6%	496.7	7.3%	NM	0.8x	GP	402,930	11.1%	11.0	13.7x	7.1x
NBFI	1,093	1,099	-5.92	-0.54%	23	104,163	1.4%	153.9	2.3%	NM	NM	SQURPHARMA	193,601	5.3%	29.2	8.2x	1.4x
Mutual Fund	561	562	-0.99	-0.18%	37	26,867	0.4%	97.2	1.4%	NM	0.5x	ROBI	152,424	4.2%	130.9	17.5x	2.4x
General Insurance	2,877	2,869	+8.62	+0.30%	43	82,112	1.1%	192.9	2.8%	13.8x	1.2x	BATBC	151,200	4.2%	39.9	12.2x	2.8x
Life Insurance	2,061	2,047	+13.48	+0.66%	15	54,812	0.8%	336.3	4.9%	NM	NM	WALTONHIL	141,589	3.9%	69.9	13.7x	1.2x
Telecommunication	4,957	4,986	-28.45	-0.57%	3	581,277	8.0%	175.9	2.6%	14.5x	4.2x	BRACBANK	139,365	3.8%	28.7	9.8x	1.6x
Pharmaceutical	3,105	3,087	+18.32	+0.59%	34	588,656	8.1%	893.1	13.1%	13.5x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,171	1,174	-2.70	-0.23%	23	310,299	4.3%	318.7	4.7%	19.6x	0.7x	MARICO	87,463	2.4%	11.7	14.3x	26.2x
Cement	2,078	2,050	+28.03	+1.37%	7	99,026	1.4%	79.9	1.2%	22.8x	2.2x	UPGDCL	82,491	2.3%	11.0	7.1x	2.0x
Services & Real Estate	1,106	1,106	-0.05	-0.00%	9	60,820	0.8%	478.9	7.0%	26.9x	0.5x	BERGERPBL	69,819	1.9%	21.7	19.9x	4.0x
Engineering	2,595	2,607	-11.14	-0.43%	42	292,790	4.0%	678.8	10.0%	15.7x	0.9x	LHB	64,340	1.8%	43.2	17.2x	3.4x
Food & Allied	14,557	14,527	+29.51	+0.20%	21	266,352	3.7%	342.8	5.0%	20.2x	4.2x	RENATA	55,582	1.5%	11.1	19.8x	1.6x
IT	2,131	2,145	-13.91	-0.65%	11	28,111	0.4%	508.3	7.5%	23.7x	1.8x	BXPHARMA	54,381	1.5%	75.0	8.5x	1.1x
Textile	1,234	1,231	+3.38	+0.28%	58	128,512	1.8%	1,277.5	18.7%	NM	0.9x	UNILEVERCL	45,825	1.3%	0.2	72.1x	25.1x
Paper & Printing	5,351	5,390	-39.12	-0.73%	6	24,174	0.3%	156.8	2.3%	NM	1.1x	ICB	44,317	1.2%	8.5	NM	1.1x
Tannery	2,086	2,089	-2.94	-0.14%	6	23,244	0.3%	33.9	0.5%	NM	1.7x	EBL	39,736	1.1%	14.6	5.7x	0.9x
Jute	13,518	13,738	-220.78	-1.61%	3	2,976	0.0%	28.0	0.4%	NM	NM	DUTCHBANGL	39,441	1.1%	12.4	10.5x	0.8x
Ceramics	433	435	-1.62	-0.37%	5	19,422	0.3%	102.9	1.5%	NM	1.3x	CITYBANK	38,487	1.1%	69.1	3.5x	0.7x
Miscellaneous	4,177	4,155	+22.74	+0.55%	15	226,847	3.1%	459.9	6.7%	89.9x	1.8x	PUBALIBANK	37,351	1.0%	10.6	5.1x	0.6x
Corporate Bond**	16,594	16,593	+1.36	+0.01%	16	36,636	0.5%	0.1	0.0%	NM	NM	PRIMEBANK	32,613	0.9%	8.5	3.9x	0.8x
Treasury Bond**	2,341	2,338	+2.85	+0.12%	235	3,586,891	49.5%	6.8	0.1%	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
PRIMEFIN	2.2	+10.0%	0.5	NM	0.3x	SQURPHARMA	108,958	7.7%	8.2x	1.4x	SAPORTL	41.0	-0.5%	358.5	15.2x	1.2x
NAVANACNG	25.7	+9.8%	11.4	NM	0.8x	ISLAMIBANK	74,730	5.3%	NM	0.9x	FEKDIL	20.6	-1.4%	216.6	9.8x	1.0x
MIRACLEIND	37.2	+9.7%	3.7	NM	2.0x	BEXIMCO	69,463	4.9%	NM	1.3x	ORIONINFU	537.2	+3.8%	186.6	NM	34.2x
KPPL	13.6	+9.7%	2.5	NM	NM	BATBC	50,233	3.6%	12.2x	2.8x	SIMTEX	22.1	+6.8%	170.3	22.8x	1.0x
SIBL	3.4	+9.7%	4.3	NM	0.2x	WALTONHIL	46,773	3.3%	13.7x	1.2x	BSC	116.5	+2.6%	161.4	5.9x	1.2x
EMERALDOIL	17.0	+9.68%	7.7	14.5x	NM	BRACBANK	46,489	3.3%	9.8x	1.6x	DOMINAGE	17.9	-4.8%	155.9	NM	1.0x
DULAMIACOT	144.5	+9.6%	11.3	NM	NM	GP	44,708	3.2%	13.7x	7.1x	KBPPWBIL	154.1	+0.1%	150.3	NM	12.9x
FAREASTFIN	1.2	+9.1%	0.5	NM	NM	RENATA	32,968	2.3%	19.8x	1.6x	TECHNODRUG	38.6	-2.8%	131.8	NM	1.3x
FASFIN	1.3	+8.3%	0.7	NM	NM	BXPHARMA	23,409	1.7%	8.5x	1.1x	ROBI	29.1	-1.7%	130.9	17.5x	2.4x
IFIC	5.3	+8.2%	20.4	NM	0.4x	PUBALIBANK	22,905	1.6%	5.1x	0.6x	ISNLTD	114.6	+2.7%	117.7	NM	41.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.5x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ILFSL	1.3	-7.1%	0.3	NM	NM	LHB	20,953	1.5%	17.2x	3.4x	KBPPWBIL	146.0	140.0	8.0	509	71.72
CVOPRL	167.2	-5.2%	102.7	62.4x	14x	OLYMPIC	20,496	1.5%	17.1x	2.6x	FINEFOODS	305.7	291.6	16.0	143	43.04
DOMINAGE	17.9	-4.8%	155.9	NM	1.0x	ALARABANK	18,282	1.3%	36.9x	0.8x	BRACBANK	69.7	69.7	1.0	600	41.82
MONNOCERA	86.0	-4.7%	36.5	NM	1.1x	BEACONPHAR	17,838	1.3%	33.7x	4.5x	ORIONINFU	555.0	485.3	5.0	46	22.59
IFILISLMF1	4.1	-4.7%	0.7	NM	0.6x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	AL-HAJTEX	168.0	150.0	9.0	72	11.51
SALAMCRST	19.9	-4.3%	39.4	NM	1.1x	ROBI	14,876	1.1%	17.5x	2.4x	BATBC	279.0	279.0	1.0	40	11.16
ACMEPL	16.1	-3.6%	33.9	NM	1.0x	UTTARABANK	13,699	1.0%	NM	0.8x	GQBALLPEN	510.0	510.0	3.0	19	9.59
MONNOFABR	20.3	-3.3%	60.6	NM	0.8x	NBL	13,055	0.9%	NM	NM	CITYGENINS	66.0	60.0	5.0	128	8.16
SILCOPHL	17.5	-3.3%	28.9	38.9x	0.8x	BSRMLTD	12,852	0.9%	5.1x	0.5x	SUNLIFEINS	61.6	60.5	3.0	118	7.21
NORTHERN	97.2	-3.1%	0.6	NM	1.2x	* 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					PTL	61.6	55.8	5.0	100	5.97

* 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
KBPPWBIL	146.0	140.0	71.7	509	8
FINEFOODS	305.7	291.6	43.0	143	16
BRACBANK	69.7	69.7	41.8	600	1
ORIONINFU	555.0	485.3	22.6	46	5
AL-HAJTEX	168.0	150.0	11.5	72	9
BATBC	279.0	279.0	11.2	40	1
GQBALLPEN	510.0	510.0	9.6	19	3
CITYGENINS	66.0	60.0	8.2	128	5
SUNLIFEINS	61.6	60.5	7.2	118	3
PTL	61.6	55.8	6.0	100	5
DBH1STMF	6.5	6.3	5.7	886	5
LOVELLO	101.0	88.5	4.1	42	3
SHYAMPSUG	194.5	194.5	4.1	21	5
CLICL	60.0	59.0	2.4	40	3
BPML	31.9	31.9	2.2	69	1
MALEKSPIN	36.2	36.2	1.9	54	1
POWERGRID	30.2	30.2	1.9	63	1
TILIL	61.9	61.9	1.9	30	1
OIMEX	25.9	25.9	1.3	50	2
AMANFEED	26.9	26.9	1.3	48	1
EXIM1STMF	4.3	4.3	1.3	294	1
SAIFPOWER	6.0	6.0	1.0	170	1
Total			270.0		93

Important DSE News

DHAKABANK

Mr. A.T.M. Hayatuzzaman Khan, one of the Sponsors of the Company, has expressed his intention to buy 2,600,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within October 30, 2025.

NAVANACNG

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., 25.09.2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended June 30, 2024.

MONNOCERA

The Board of Directors has recommended 2% cash dividend for the year ended June 30, 2025. Date of AGM: 11.12.2025, Time: 12:00 PM, Venue: Hybrid System in Combination of both Physical Presence at Factory Premises, Islampur, Dhamrai, Dhaka-1350. The Company has also reported EPS of Tk. 0.22, NAV per share of Tk. 80.14 and NOCFPS of Tk. (5.44) for the year ended June 30, 2025 as against Tk. 0.39, Tk. 79.99 and Tk. (0.17) respectively for the year ended June 30, 2024. NAV Per Share has increased from the previous year due to the increase of the current assets of the Company.

EBL

The company has informed that the Board of Directors in its meeting held on September 24, 2025 has approved the issuance of an Unsecured, Non-convertible, Fully Redeemable, Floating Rate, Coupon bearing Subordinated Bond (sub-debt). This bond will be issued through private placement worth BDT 800.00 (Taka Eight Hundred) Crore, with a tenure of 7 (Seven) years, to strengthen the Tier-II capital of the company. The issuance of the bond is subject to approval from the concerned regulatory authorities.

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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