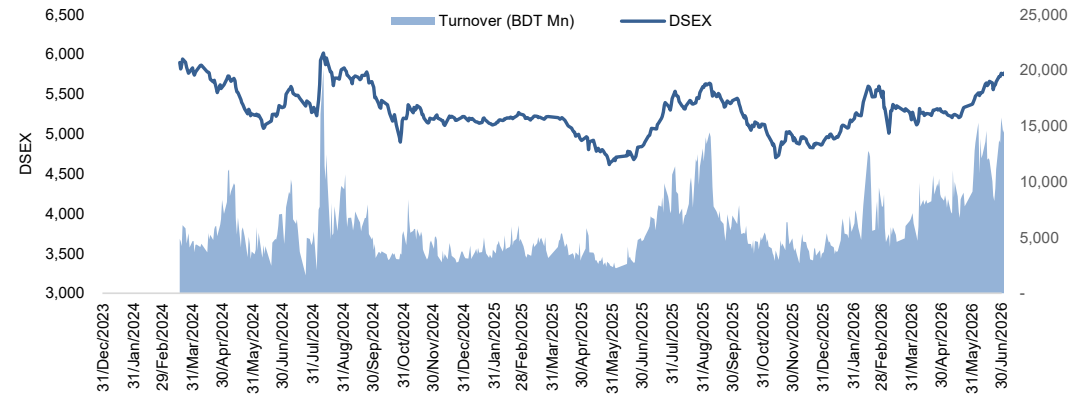


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.12%) lost 6.89 points and closed at 5,525.86. The blue-chip index DS30 (-0.06%), the Shariah-based index DSES (-0.28%), and the large-cap index CDSET (-0.19%) closed at 2,097.94, 1,100.18, and 1,101.20 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.92% followed by Engineering (-0.87%), Food & Allied (-0.27%), Fuel & Power (-0.11%), Telecommunication (-0.11%), Bank (-0.06%), and Pharmaceutical (+0.01%), respectively. Block trades contributed 5.5% of the overall market turnover. Apex Spinning & Knitting Mills Limited (+6.9%) was the most traded share with a turnover of BDT 453 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,525.86	5,532.75	-6.89	-0.12%	+13.6%
DS30	2,097.94	2,099.29	-1.35	-0.06%	+13.2%
DSES	1,100.18	1,103.30	-3.12	-0.28%	+9.9%
CDSET	1,101.20	1,103.29	-2.09	-0.19%	+9.6%

	Advanced	Declined	Unchanged	Total
All Category	125	224	45	394
A Category (Equity)	79	109	14	202
B Category (Equity)	20	50	4	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	26	65	27	118
Mutual Funds	3	28	2	33
Corporate Bonds	2	2	0	4
Treasury Bonds	0	7	0	7

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,875,358	6,884,198	-0.1%
	Mn USD	55,990	56,062	
Turnover	Mn BDT	7,465	7,274	+2.6%
	Mn USD	61	59	
Volume	Mn Shares	235	254	-7.7%
No. of Trade		195,699	203,481	-3.8%

* Average Interbank Exchange Rate is BDT 122.80 as of Sep 28, 2026

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Tasviha Taher Trishila
Research Associate

(880) 1730701733

tasviha.trishila@bracepl.com

Figure: Sectorial Turnover (BDT Mn)

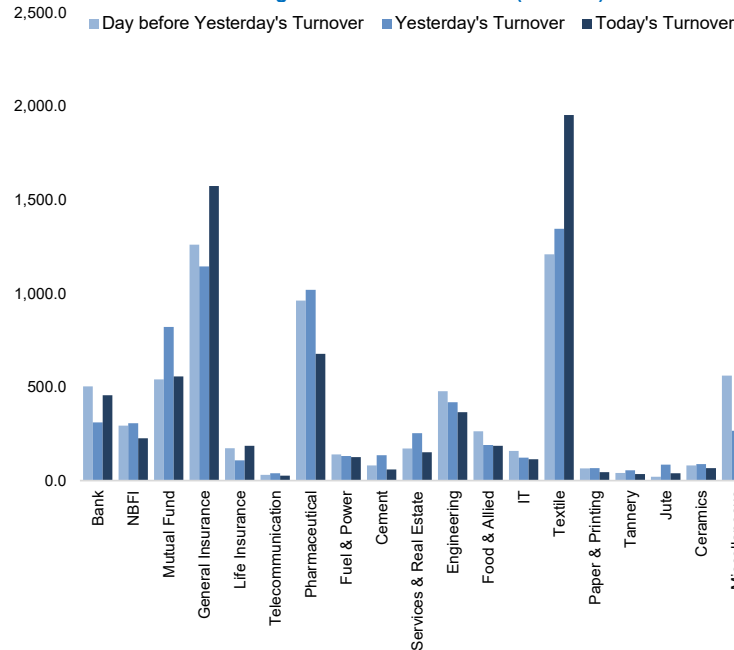
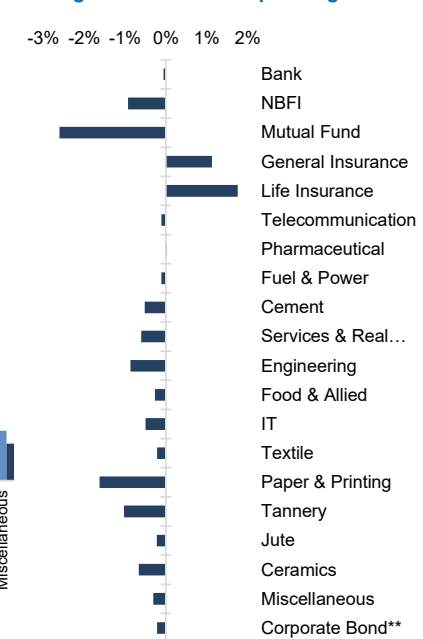


Figure: Sectorial Mcap Change



Market PE 13.0x

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	1,539	1,540	-0.89	-0.06%	36	733,365	10.7%	456.0	6.5%	7.2x	0.7x	GP	327,313	9.4%	10.2	9.3x	5.8x
NBFI	1,079	1,089	-10.05	-0.92%	23	102,568	1.5%	225.7	3.2%	NM	1.1x	SQURPHARMA	192,980	5.5%	52.8	7.5x	1.3x
Mutual Fund	695	714	-18.60	-2.61%	34	32,361	0.5%	555.9	7.9%	NM	0.6x	ROBI	157,662	4.5%	14.5	15.1x	2.4x
General Insurance	4,627	4,575	+51.62	+1.13%	43	130,726	1.9%	1,573.3	22.3%	19.3x	1.8x	BRACBANK	147,906	4.2%	152.3	6.5x	1.3x
Life Insurance	1,719	1,690	+29.77	+1.76%	15	48,465	0.7%	186.4	2.6%	NM	NM	WALTONHIL	123,782	3.5%	17.4	11.0x	1.0x
Telecommunication	4,417	4,422	-4.68	-0.11%	3	512,563	7.5%	27.1	0.4%	10.6x	3.7x	BATBC	121,446	3.5%	12.3	20.9x	2.1x
Pharmaceutical	3,085	3,085	+0.43	+0.01%	34	582,366	8.5%	677.0	9.6%	10.6x	1.5x	MARICO	83,948	2.4%	2.2	7.5x	18.2x
Fuel & Power	1,091	1,092	-1.21	-0.11%	23	287,952	4.2%	125.5	1.8%	9.3x	0.6x	BERGERPBL	71,587	2.1%	1.5	15.3x	3.3x
Cement	1,938	1,948	-10.10	-0.52%	7	91,165	1.3%	59.8	0.8%	21.2x	2.1x	UPGDCL	66,201	1.9%	2.6	7.1x	1.4x
Services & Real Estate	1,146	1,153	-6.98	-0.61%	9	62,384	0.9%	151.9	2.2%	25.4x	0.5x	BXPHARMA	66,069	1.9%	176.2	7.6x	1.1x
Engineering	2,527	2,549	-22.10	-0.87%	42	283,234	4.1%	365.5	5.2%	14.9x	0.8x	PUBALIBANK	59,502	1.7%	33.6	5.0x	0.8x
Food & Allied	12,198	12,231	-32.72	-0.27%	21	222,689	3.2%	185.2	2.6%	32.6x	3.3x	CITYBANK	52,482	1.5%	90.2	3.4x	0.8x
IT	2,356	2,367	-11.72	-0.50%	11	31,193	0.5%	113.5	1.6%	50.8x	1.9x	RENATA	51,476	1.5%	4.3	18.9x	1.4x
Textile	1,379	1,382	-2.99	-0.22%	58	143,420	2.1%	1,952.0	27.7%	NM	1.0x	DUTCHBANGL	46,286	1.3%	5.2	3.6x	0.7x
Paper & Printing	4,471	4,545	-73.78	-1.62%	6	20,942	0.3%	45.6	0.6%	NM	1.4x	ISLAMIBANK	42,987	1.2%	0.4	NM	0.7x
Tannery	2,054	2,075	-21.28	-1.03%	6	23,847	0.3%	34.8	0.5%	NM	1.5x	UNILEVERCL	38,281	1.1%	0.3	62.5x	23.5x
Jute	13,587	13,617	-29.87	-0.22%	3	2,964	0.0%	39.9	0.6%	NM	1.8x	EBL	37,476	1.1%	21.7	4.2x	0.7x
Ceramics	447	450	-2.96	-0.66%	5	20,181	0.3%	66.6	0.9%	NM	1.3x	POWERGRID	34,359	1.0%	1.0	8.5x	0.3x
Miscellaneous	2,437	2,445	-7.42	-0.30%	15	132,358	1.9%	197.5	2.8%	37.4x	1.0x	PRIMEBANK	34,121	1.0%	28.1	3.7x	0.7x
Corporate Bond**	18,168	18,206	-38.64	-0.21%	16	40,194	0.6%	0.2	0.0%	NM	NM	ICB	33,650	1.0%	1.3	NM	1.3x
Treasury Bond**	2,197	2,199	-1.56	-0.07%	232	3,374,952	49.1%	11.4	0.2%	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
CLICL	47.1	+7.3%	23.0	NM	NM	SQURPHARMA	107,780	7.3%	7.5x	1.3x	APEXSPINN	379.4	+6.9%	453.0	NM	4.5x
SAIHAMTEX	38.3	+7.3%	397.3	61.8x	0.9x	BRACBANK	79,618	5.4%	6.5x	1.3x	SAIHAMTEX	38.3	+7.3%	397.3	61.8x	0.9x
APEXSPINN	379.4	+6.9%	453.0	NM	4.5x	BXPHARMA	46,163	3.1%	7.6x	1.1x	MERCINS	52.3	-2.8%	192.6	33.5x	2.4x
ETL	15.5	+6.2%	168.4	24.2x	1.2x	ISLAMIBANK	42,909	2.9%	NM	0.7x	IPDC	35.5	+1.1%	185.6	29.8x	2.1x
TILIL	46.9	+5.6%	17.6	17.6x	NM	WALTONHIL	40,737	2.8%	11.0x	1.0x	ENVOYTEX	70.5	-3.3%	180.8	8.6x	1.2x
PREMIERLEA	2.0	+5.26%	0.3	NM	NM	PUBALIBANK	40,538	2.8%	5.0x	0.8x	BXPHARMA	148.1	+0.7%	176.2	7.6x	1.1x
DGIC	41.0	+5.1%	85.3	77.4x	3x	CITYBANK	36,543	2.5%	3.4x	0.8x	ETL	15.5	+6.2%	168.4	24.2x	1.2x
KAY&QUE	414.4	+4.9%	41.9	26.4x	3.7x	GP	32,731	2.2%	9.3x	5.8x	BRACBANK	64.6	+0.3%	152.3	6.5x	1.3x
CONTININS	34.4	+4.6%	18.8	19.9x	1.5x	BATBC	32,122	2.2%	20.9x	2.1x	ORIONINFU	281.6	+0.7%	151.6	NM	17.4x
ICICL	39.9	+4.5%	59.7	23.3x	2.2x	EBL	25,694	1.7%	4.2x	0.7x	RELIANCINS	111.3	+0.4%	143.1	11.7x	1.3x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA					Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
1STPRIMFMF	33.4	-8.7%	92.5	NM	3.4x	LHB	21,982	1.5%	12.2x	3.2x	SHAHJABANK	15.8	15.8	1.0	6,390	100.96
LRGLOBMF1	4.5	-6.2%	2.4	NM	0x	PRIMEBANK	21,316	1.5%	3.7x	0.7x	SQURPHARMA	217.8	217.0	9.0	334	72.45
BDTHAIFOOD	18.9	-5.9%	0.8	5.2x	NM	UCB	18,197	1.2%	3.8x	0.5x	CITYGENINS	131.4	118.5	3.0	360	45.29
PHOENIXFIN	3.2	-5.9%	0.8	5.2x	NM	OLYMPIC	17,879	1.2%	15.0x	2.1x	SAIHAMTEX	36.9	32.5	10.0	1,037	36.46
GREENDELMF	5.0	-5.7%	9.3	NM	0.6x	UTTARABANK	17,357	1.2%	NM	0.7x	BRACBANK	64.5	64.5	2.0	500	32.25
AZIZPIPES	74.3	-5.2%	1.1	NM	NM	ROBI	15,766	1.1%	15.1x	2.4x	PBLPBOND	4,985.0	4,985.0	1.0	6	29.65
ICB3RDNRB	6.5	-4.4%	6.1	NM	0.8x	ALARABANK	15,056	1.0%	19.7x	0.7x	IPDC	36.2	33.5	4.0	422	14.54
EXIM1STMF	6.5	-4.4%	31.8	NM	0.7x	BSRMLTD	15,000	1.0%	4.4x	0.5x	PTL	86.7	75.0	9.0	184	14.08
SAMORITA	93.4	-4.3%	25.4	NM	1.9x	BEACONPHAR	13,976	1.0%	16.0x	3.0x	BNICL	185.0	170.5	2.0	68	12.46
ICBEPMF1S1	6.7	-4.3%	6.9	NM	0.8x						ISLAMIINS	65.4	64.6	7.0	161	10.49
* 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																

* 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
SHAHJABANK	15.8	15.8	101.0	6,390	1
SQURPHARMA	217.8	217.0	72.5	334	9
CITYGENINS	131.4	118.5	45.3	360	3
SAIHAMTEX	36.9	32.5	36.5	1,037	10
BRACBANK	64.5	64.5	32.3	500	2
PBLPBOND	4,985.0	4,985.0	29.7	6	1
IPDC	36.2	33.5	14.5	422	4
PTL	86.7	75.0	14.1	184	9
BNICL	185.0	170.5	12.5	68	2
ISLAMIINS	65.4	64.6	10.5	161	7
ETL	14.7	14.7	10.3	700	2
DAFODILCOM	160.0	160.0	9.1	57	3
SAIHAMCOT	24.2	24.0	2.9	121	2
MERCINS	50.0	50.0	2.5	50	1
UNITEDFIN	18.8	18.8	1.8	94	3
TRUSTBANK	14.5	14.5	1.5	100	2
DGIC	38.8	38.8	1.4	37	1
UTTARABANK	22.7	22.7	1.4	61	2
ASIATICLAB	118.0	118.0	1.2	10	1
MONNOFABR	17.6	17.6	1.0	57	2
ONEBANKPLC	7.7	7.7	1.0	129	1
NAVANAPHAR	65.1	65.1	0.9	14	1
Total			410.4		79

Important DSE News
ENVOYTEX

The Board of Directors has recommended 32.50% Cash Dividend for the year ended June 30, 2026. Date of AGM: 05 December 2026 at 11:00 AM, Venue: Hybrid System at Gulshan Shooting Club, Gulshan Avenue, beside Police Plaza, Dhaka-1212. Record Date: 26 October 2026. The Company has also reported EPS of Tk. 8.24, NAV per share of Tk. 60.33 and NOCFPS of Tk. 14.88 for the year ended June 30, 2026 as against Tk. 8.40, Tk. 58.32 and Tk. 4.77 respectively for the year ended June 30, 2025.

PF1STMF

Phoenix Finance & Investments Limited, the Sponsor of the Fund, has expressed its intention to sell 2,000,000 units out of its total holding of 12,000,000 units of the Fund at the prevailing market price in the public market through Dhaka Stock Exchange PLC. within October 29, 2026.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GPHISPAT		0.0%	2.0%	Record Date	1-Oct-26
AAMRATECH		0.0%	0.3%	Record Date	6-Oct-26
APEXFOOT		15.0%	15.0%	Record Date	15-Oct-26
ENVOYTEX		0.0%	32.5%	Record Date	26-Oct-26

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