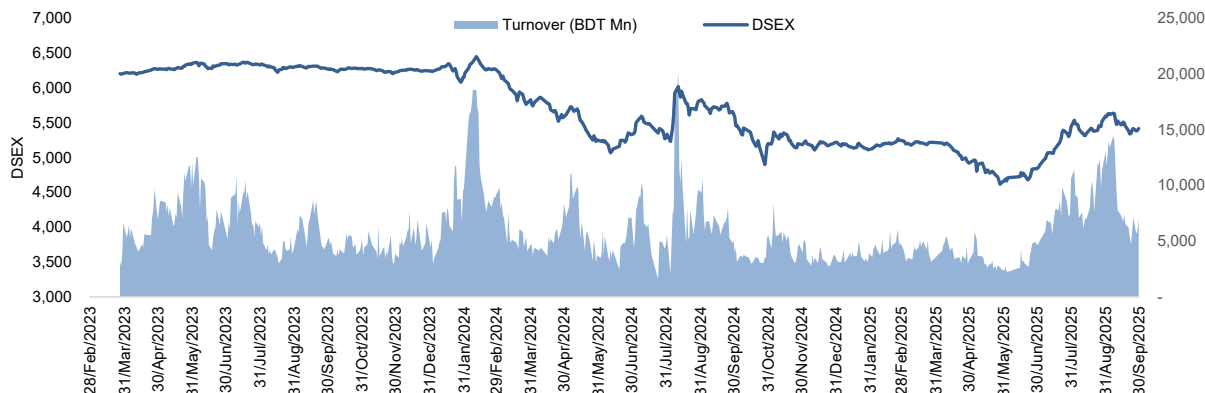


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.48%) gained 26.01 points and closed at 5,415.79. The blue-chip index DS30 (-0.13%), the Shariah-based index DSES (+0.70%), and the large-cap index CDSET (+0.19%) closed at 2,081.84, 1,171.98, and 1,093.07 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 1.18% followed by Bank (+1.02%), NBFi (+0.79%), Telecommunication (+0.54%), Fuel & Power (+0.20%), Pharmaceutical (+0.18%), and Food & Allied (-0.63%), respectively. Block trades contributed 8.8% of the overall market turnover. Sonali Paper & Board Mills Ltd. (+0.2%) was the most traded share with a turnover of BDT 259 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,415.79	5,389.78	+26.01	+0.48%	+3.8%
DS30	2,081.84	2,084.64	-2.80	-0.13%	+7.3%
DSES	1,171.98	1,163.79	+8.19	+0.70%	+0.3%
CDSET	1,093.07	1,090.97	+2.10	+0.19%	+2.5%

	Advanced	Declined	Unchanged	Total
All Category	207	130	60	397
A Category (Equity)	112	72	35	219
B Category (Equity)	38	31	12	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	57	27	13	97
Mutual Funds	8	9	19	36
Corporate Bonds	1	2	0	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,250,632	7,233,205	+0.2%
	Mn USD	59,529	59,386	
Turnover	Mn BDT	6,968	5,993	+16.3%
	Mn USD	57	49	
Volume	Mn Shares	213	171	+24.5%
No. of Trade		189,569	165,001	+14.9%

* Average Interbank Exchange Rate is BDT 121.80 as of Sep 30, 2025

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Figure: Sectorial Turnover (BDT Mn)

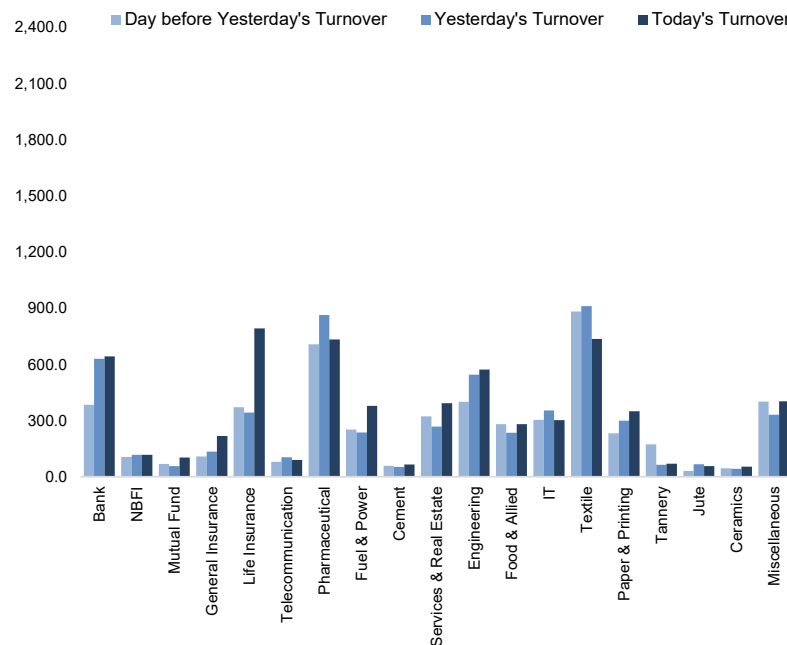
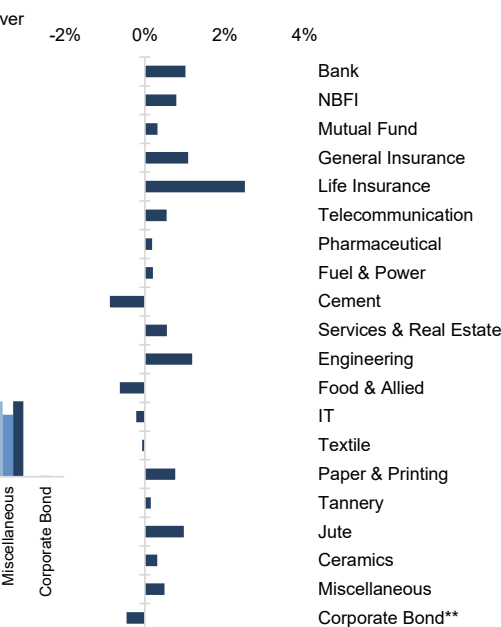


Figure: Sectorial Mcap Change



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	1,489	1,474	+14.98	+1.02%	36	704,477	9.7%	642.4	10.1%	NM	0.8x	GP	403,740	11.1%	14.1	13.7x	7.1x
NBFI	1,095	1,086	+8.56	+0.79%	23	104,319	1.4%	117.2	1.8%	NM	NM	SQURPHARMA	190,587	5.2%	61.1	8.1x	1.4x
Mutual Fund	553	551	+1.73	+0.31%	37	26,482	0.4%	102.6	1.6%	NM	0.5x	ROBI	155,043	4.3%	63.4	17.8x	2.4x
General Insurance	2,898	2,867	+31.09	+1.08%	43	82,704	1.1%	217.5	3.4%	13.9x	1.2x	BATBC	148,878	4.1%	45.4	12.0x	2.8x
Life Insurance	2,160	2,107	+52.80	+2.51%	15	57,449	0.8%	791.5	12.4%	NM	NM	WALTONHIL	139,920	3.8%	21.7	13.5x	1.2x
Telecommunication	4,983	4,956	+26.99	+0.54%	3	584,332	8.1%	90.4	1.4%	14.6x	4.2x	BRACBANK	138,369	3.8%	45.6	9.8x	1.6x
Pharmaceutical	3,077	3,071	+5.50	+0.18%	34	583,335	8.0%	732.8	11.5%	13.4x	1.6x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,166	1,163	+2.36	+0.20%	23	308,779	4.3%	378.5	6.0%	19.5x	0.7x	MARICO	89,526	2.5%	28.8	14.6x	26.8x
Cement	2,064	2,082	-18.20	-0.87%	7	98,339	1.4%	65.6	1.0%	22.7x	2.2x	UPGDCL	82,607	2.3%	4.7	7.1x	2.0x
Services & Real Estate	1,096	1,090	+5.98	+0.55%	9	60,281	0.8%	392.0	6.2%	26.7x	0.5x	BERGERPBL	71,788	2.0%	31.2	20.4x	4.2x
Engineering	2,576	2,546	+30.13	+1.18%	42	290,604	4.0%	572.4	9.0%	15.6x	0.9x	LHB	64,108	1.8%	50.9	17.1x	3.4x
Food & Allied	14,389	14,480	-91.05	-0.63%	21	263,278	3.6%	281.1	4.4%	19.9x	4.2x	RENATA	55,100	1.5%	11.4	19.6x	1.6x
IT	2,091	2,095	-4.53	-0.22%	11	27,577	0.4%	302.2	4.8%	23.2x	1.7x	BXPHARMA	52,641	1.4%	35.8	8.2x	1.1x
Textile	1,226	1,227	-0.84	-0.07%	58	127,693	1.8%	735.9	11.6%	NM	0.9x	UNILEVERCL	45,886	1.3%	0.2	72.2x	25.2x
Paper & Printing	5,551	5,509	+41.72	+0.76%	6	25,076	0.3%	350.3	5.5%	NM	1.2x	ICB	43,710	1.2%	3.3	NM	1.0x
Tannery	2,101	2,097	+3.05	+0.15%	6	23,404	0.3%	70.3	1.1%	NM	1.7x	EBL	39,417	1.1%	48.8	5.6x	0.9x
Jute	14,348	14,209	+138.26	+0.97%	3	3,158	0.0%	57.3	0.9%	NM	NM	DUTCHBANGL	39,055	1.1%	7.3	10.4x	0.8x
Ceramics	430	428	+1.32	+0.31%	5	19,272	0.3%	53.5	0.8%	NM	1.2x	CITYBANK	38,791	1.1%	86.7	3.6x	0.7x
Miscellaneous	4,191	4,170	+20.59	+0.49%	15	227,576	3.1%	402.1	6.3%	90.2x	1.8x	PUBALIBANK	37,872	1.0%	4.5	5.2x	0.7x
Corporate Bond**	16,583	16,659	-76.09	-0.46%	16	36,611	0.5%	1.9	0.0%	NM	NM	PRIMEBANK	32,845	0.9%	16.3	3.9x	0.8x
Treasury Bond**	2,357	2,355	+2.00	+0.08%	235	3,602,826	49.6%	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
SIBL	4.4	+10.0%	5.4	NM	0.3x	SQURPHARMA	108,958	7.7%	8.1x	1.4x	SONALIPAPR	293.3	+0.2%	258.7	28.4x	1.8x
BDLAMPS	164.7	+9.9%	17.3	NM	3.7x	ISLAMIBANK	74,730	5.3%	NM	0.9x	SAPORTL	42.5	+0.7%	254.4	15.8x	1.2x
KPCL	11.4	+9.6%	1.5	33.5x	0.6x	BEXIMCO	69,463	4.9%	NM	1.3x	RUPALILIFE	114.9	+5.9%	243.6	NM	NM
ABBBANK	5.7	+9.6%	19.4	NM	NM	BATBC	50,233	3.6%	12.0x	2.8x	ORIONINFU	528.8	+0.8%	188.8	NM	33.7x
NFML	11.5	+9.5%	11.7	NM	1.1x	WALTONHIL	46,773	3.3%	13.5x	1.2x	CVOPRL	179.5	+4.1%	186.1	47.0x	13.7x
IFIC	5.8	+9.43%	57.5	NM	0.5x	BRACBANK	46,489	3.3%	9.8x	1.6x	PRAGATILIF	235.3	+1.2%	169.8	NM	NM
PRIMEFIN	2.4	+9.1%	1.5	NM	0x	GP	44,708	3.2%	13.7x	7.1x	KBPPWBIL	149.4	-	167.8	NM	12.5x
BIFC	3.7	+8.8%	0.5	NM	NM	RENATA	32,968	2.3%	19.6x	1.6x	DOMINAGE	19.1	+1.6%	128.0	NM	1.1x
ICBIBANK	2.5	+8.7%	1.4	NM	NM	BXPHARMA	23,409	1.7%	8.2x	1.1x	KAY&QUE	420.9	+4.8%	127.1	NM	4.3x
FIRSTSBANK	2.6	+8.3%	2.8	NM	1.1x	PUBALIBANK	22,905	1.6%	5.2x	0.7x	FEKDIL	20.5	-1.0%	120.9	9.8x	1.0x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.6x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
GQBALLPEN	556.9	-7.1%	49.2	NM	4.1x	LHB	20,953	1.5%	17.1x	3.4x	BRACBANK	69.4	69.4	3.0	5,373	372.88
MIRACLEIND	34.8	-4.4%	20.7	NM	2x	OLYMPIC	20,496	1.5%	16.7x	2.6x	EBL	24.7	23.8	8.0	5,600	133.73
PRIMETEX	13.4	-4.3%	2.1	NM	0.2x	ALARABANK	18,282	1.3%	36.7x	0.8x	FINEFOODS	323.0	300.0	5.0	59	18.75
APEXFOODS	243.6	-4.1%	8.6	55.2x	1.9x	BEACONPHAR	17,838	1.3%	32.7x	4.4x	LOVELLO	103.0	90.0	10.0	173	16.27
NURANI	2.4	-4.0%	0.4	NM	0.3x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	KBPPWBIL	135.0	135.0	2.0	100	13.50
CNATEX	2.9	-3.3%	1.0	NM	NM	ROBI	14,876	1.1%	17.8x	2.4x	AL-HAJTEX	169.8	162.0	6.0	72	11.64
TALLUSPIN	6.1	-3.2%	0.8	NM	0.5x	UTTARABANK	13,699	1.0%	NM	0.8x	BATBC	275.0	275.0	1.0	21	5.64
ISNLTD	107.4	-3.2%	61.0	NM	39.1x	NBL	13,055	0.9%	NM	NM	ORIONINFU	550.0	550.0	2.0	9	4.93
GENEXIL	29.9	-2.9%	64.5	13.8x	1.3x	BSRMLTD	12,852	0.9%	5.1x	0.5x	ASIATICLAB	63.6	62.6	5.0	55	3.47
PHENIXINS	27.6	-2.8%	0.8	17.7x	0.8x	* 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										

* 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	Important DSE News
BRACBANK	69.4	69.4	372.9	5,373	3	SIPLC The company has informed that the Board of Directors has elected Major General Md Sajjad Hossain, SUP, ndc, afwc, psc as the Chairman of the company.
EBL	24.7	23.8	133.7	5,600	8	
FINEFOODS	323.0	300.0	18.8	59	5	CLICL The company has informed that the Board of Directors has elected Engr. Md. Nurul Aktar as the Chairman of the company.
LOVELLO	103.0	90.0	16.3	173	10	
KBPPWBIL	135.0	135.0	13.5	100	2	
AL-HAJTEX	169.8	162.0	11.6	72	6	
BATBC	275.0	275.0	5.6	21	1	
ORIONINFU	550.0	550.0	4.9	9	2	
ASIATICLAB	63.6	62.6	3.5	55	5	
CITYGENINS	68.1	63.1	3.4	52	2	
CLICL	58.3	53.0	2.0	38	2	
BPML	37.7	37.7	1.9	51	1	
MONNOFABR	18.0	18.0	1.8	100	1	
ACMEPL	16.5	16.5	1.7	100	1	
SQURPHARMA	215.0	215.0	1.6	7	1	
CVOPRL	173.1	173.1	1.6	9	1	
EXIM1STMF	4.0	4.0	1.5	382	2	
HAKKANIPUL	80.0	80.0	1.5	19	1	
AMANFEED	26.6	26.6	1.5	56	1	
SALVOCHEM	35.8	35.8	1.4	40	1	
BXPHARMA	125.0	125.0	1.3	10	1	
KAY&QUE	405.0	405.0	1.2	3	1	
Total			610.4		68	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EHL		0.0%	25.0%	Record Date	5-Oct-25
GSPFINANCE		0.0%	0.0%	Record Date	14-Oct-25
APEXFOOT		25.0%	25.0%	Record Date	20-Oct-25
BANGAS		0.0%	3.0%	Record Date	21-Oct-25
TALLUSPIN		0.0%	0.0%	Record Date	21-Oct-25
BSCPLC		0.0%	40.0%	Record Date	22-Oct-25
MONNOCERA		0.0%	2.0%	Record Date	23-Oct-25
DULAMACOT		0.0%	3.0%	Record Date	23-Oct-25
ENVOYTEX		0.0%	30.0%	Record Date	26-Oct-25
MITHUNKNIT		0.0%	0.0%	Record Date	29-Oct-25
CVOPRL		9.0%	11.0%	Record Date	30-Oct-25

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