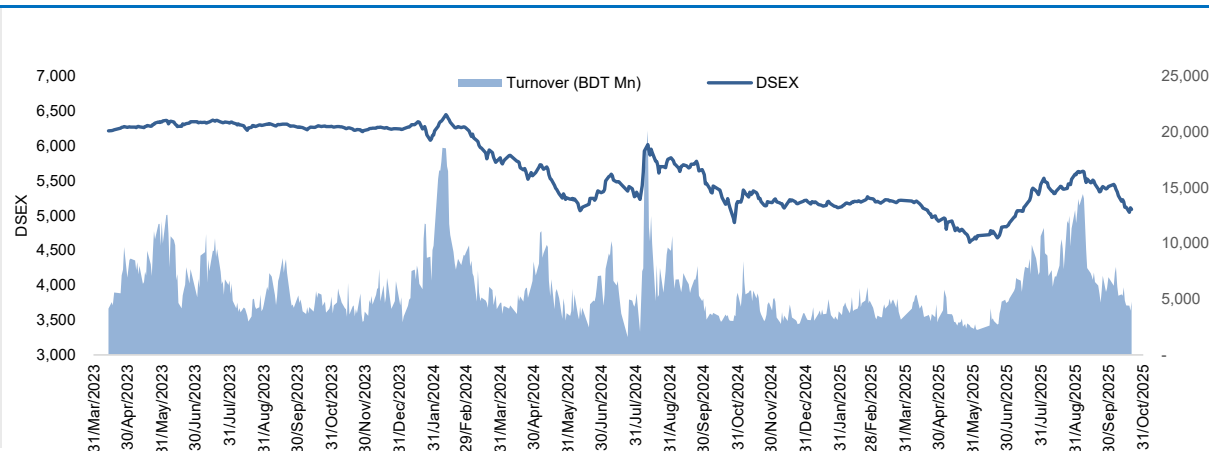


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.44%) lost 22.27 points and closed at 5,089.33. The blue-chip index DS30 (+0.16%), the Shariah-based index DSES (-0.37%), and the large-cap index CDSET (-0.01%) closed at 1,968.89, 1,077.22, and 1,046.68 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.19% followed by NBFi (-0.74%), Telecommunication (-0.49%), Fuel & Power (-0.46%), Pharmaceutical (-0.36%), Bank (-0.07%), and Food & Allied (+1.06%), respectively. Block trades contributed 1.9% of the overall market turnover. Dominage Steel Building Systems Limited (+1.7%) was the most traded share with a turnover of BDT 245 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,089.33	5,111.60	-22.27	-0.44%	-2.4%
DS30	1,968.89	1,965.83	+3.05	+0.16%	+1.5%
DSES	1,077.22	1,081.20	-3.98	-0.37%	-7.8%
CDSET	1,046.68	1,046.81	-0.13	-0.01%	-1.8%

	Advanced	Declined	Unchanged	Total
All Category	80	241	72	393
A Category (Equity)	33	153	33	219
B Category (Equity)	19	50	10	79
N Category (Equity)	0	0	0	0
Z Category (Equity)	28	38	29	95
Mutual Funds	0	18	18	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,020,375	7,033,039	-0.2%
	Mn USD	57,618	57,722	
Turnover	Mn BDT	4,780	3,946	+21.1%
	Mn USD	39	32	
Volume	Mn Shares	147	141	+4.0%
No. of Trade		160,819	138,739	+15.9%

* Average Interbank Exchange Rate is BDT 121.84 as of Oct 21, 2025

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Figure: Sectorial Turnover (BDT Mn)

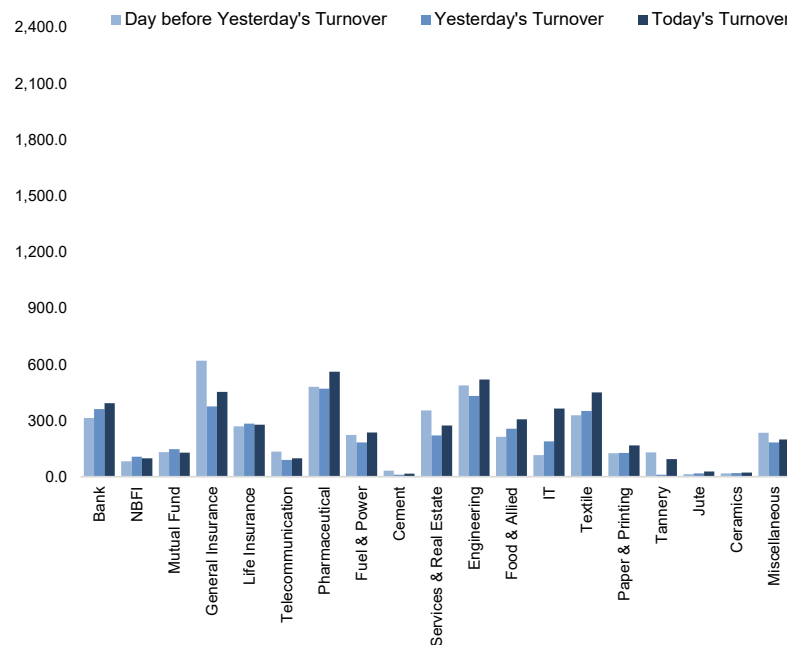
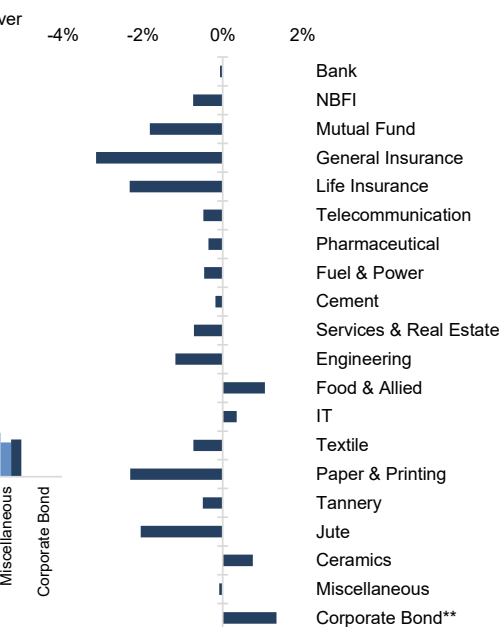


Figure: Sectorial Mcap Change



Market PE 15.7x

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	1,408	1,409	-0.98	-0.07%	36	666,035	9.5%	393.3	8.4%	NM	0.8x	GP	386,051	11.2%	19.6	13.1x	6.8x
NBFI	997	1,005	-7.46	-0.74%	23	95,016	1.4%	98.1	2.1%	NM	NM	SQURPHARMA	188,814	5.5%	146.8	8.0x	1.4x
Mutual Fund	530	540	-9.88	-1.83%	37	25,420	0.4%	128.1	2.7%	NM	0.5x	ROBI	152,424	4.4%	59.9	17.5x	2.4x
General Insurance	2,897	2,992	-94.95	-3.17%	43	82,682	1.2%	453.0	9.7%	13.9x	1.2x	BATBC	141,264	4.1%	62.5	11.4x	2.6x
Life Insurance	1,958	2,005	-46.71	-2.33%	15	52,084	0.7%	278.5	5.9%	NM	NM	BRACBANK	136,578	4.0%	101.1	9.7x	1.6x
Telecommunication	4,803	4,826	-23.46	-0.49%	3	563,145	8.0%	98.7	2.1%	14.1x	4.1x	WALTONHIL	127,657	3.7%	10.5	12.3x	1.1x
Pharmaceutical	2,944	2,954	-10.60	-0.36%	34	558,116	7.9%	560.5	12.0%	12.8x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,104	1,109	-5.15	-0.46%	23	292,418	4.2%	235.7	5.0%	24.1x	0.6x	MARICO	87,025	2.5%	6.6	14.2x	26.1x
Cement	1,911	1,915	-3.49	-0.18%	7	91,072	1.3%	17.0	0.4%	20.9x	2.0x	UPGDCL	82,954	2.4%	5.8	7.1x	2.0x
Services & Real Estate	977	984	-7.07	-0.72%	9	53,719	0.8%	273.1	5.8%	23.8x	0.4x	BERGERPBL	69,618	2.0%	1.9	19.8x	4.0x
Engineering	2,374	2,402	-28.49	-1.19%	42	267,774	3.8%	519.2	11.1%	13.1x	0.8x	LHB	59,462	1.7%	9.5	15.9x	3.1x
Food & Allied	13,755	13,612	+143.62	+1.06%	21	251,686	3.6%	306.0	6.5%	19.1x	4.0x	RENATA	51,946	1.5%	7.5	18.5x	1.5x
IT	1,858	1,851	+6.50	+0.35%	11	24,503	0.3%	364.5	7.8%	20.6x	1.5x	BXPHARMA	49,028	1.4%	32.5	7.7x	1.0x
Textile	1,104	1,112	-8.14	-0.73%	58	114,933	1.6%	449.5	9.6%	NM	0.8x	UNILEVERCL	46,280	1.3%	0.5	72.8x	25.4x
Paper & Printing	4,711	4,823	-111.72	-2.32%	6	21,285	0.3%	167.9	3.6%	NM	1.0x	ICB	40,414	1.2%	2.8	NM	1.0x
Tannery	2,000	2,010	-10.00	-0.50%	6	22,285	0.3%	93.6	2.0%	NM	1.7x	DUTCHBANGL	37,411	1.1%	10.9	10.0x	0.7x
Jute	11,601	11,844	-242.98	-2.05%	3	2,554	0.0%	28.3	0.6%	NM	NM	EBL	36,385	1.1%	22.5	5.2x	0.8x
Ceramics	383	380	+2.87	+0.76%	5	17,177	0.2%	22.9	0.5%	NM	1.1x	CITYBANK	36,357	1.1%	28.0	3.3x	0.7x
Miscellaneous	4,013	4,017	-3.58	-0.09%	15	217,921	3.1%	198.8	4.2%	86.5x	1.7x	PUBALIBANK	35,789	1.0%	15.2	4.9x	0.6x
Corporate Bond**	16,869	16,645	+223.75	+1.34%	16	37,243	0.5%	0.2	0.0%	NM	NM	PRIMEBANK	31,220	0.9%	18.1	3.7x	0.8x
Treasury Bond**	2,352	2,349	+2.36	+0.10%	233	3,567,112	50.8%	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
ISNLTD	93.4	+9.9%	74.9	NM	34.0x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	DOMINAGE	23.4	+1.7%	244.9	NM	1.4x
SAMATALETH	93.2	+9.8%	14.5	NM	6.5x	ISLAMIBANK	74,730	5.3%	NM	0.9x	SAPORTL	43.2	+0.7%	179.7	16.1x	1.2x
SONARGAON	28.6	+9.6%	19.4	86.7x	1.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SQURPHARMA	213.0	-0.4%	146.8	8.0x	1.4x
MITHUNKNIT	14.0	+8.5%	0.5	NM	4.4x	BATBC	50,233	3.6%	11.4x	2.6x	ORIONINFU	487.4	-0.8%	142.4	NM	31.0x
METROSPIN	9.5	+8.0%	0.3	NM	2.0x	WALTONHIL	46,773	3.3%	12.3x	1.1x	SONALIPAPR	246.8	-4.3%	124.2	23.9x	1.5x
INTECH	30.6	+6.62%	71.0	NM	NM	BRACBANK	46,489	3.3%	9.7x	1.6x	SIMTEX	28.5	-3.7%	101.9	29.4x	1.3x
AAMRATECH	12.4	+6.0%	0.2	NM	1x	GP	44,708	3.2%	13.1x	6.8x	BRACBANK	68.6	+1.8%	101.1	9.7x	1.6x
PRIMEFIN	2.1	+5.0%	0.5	NM	0.3x	RENATA	32,968	2.3%	18.5x	1.5x	LOVELLO	94.0	+2.0%	97.4	51.0x	7.2x
NEWLINE	4.4	+4.8%	1.4	NM	0.2x	BXPHARMA	23,409	1.7%	7.7x	1.0x	CVOPRL	173.4	-2.5%	96.1	45.4x	13.2x
SHYAMPSUG	192.9	+4.6%	3.3	NM	NM	PUBALIBANK	22,905	1.6%	4.9x	0.6x	PRAGATILIF	244.3	-5.9%	95.5	NM	NM
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.3x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PLFSL	0.9	-10.0%	0.4	NM	NM	LHB	20,953	1.5%	15.9x	3.1x	SIMTEX	30.0	28.0	5.0	1,071	30.07
PREMIERLEA	1.1	-8.3%	0.2	NM	NM	OLYMPIC	20,496	1.5%	16.0x	2.5x	ORIONINFU	470.5	464.5	6.0	31	14.27
ILFSL	1.1	-8.3%	0.1	NM	NM	ALARABANK	18,282	1.3%	34.5x	0.7x	GQBALLPEN	510.0	500.0	2.0	15	7.55
NORTHRNINS	29.0	-7.9%	0.8	16.7x	1.1x	BEACONPHAR	17,838	1.3%	29.1x	3.9x	FINEFOODS	295.0	290.1	3.0	15	4.33
RELIANCE1	17.1	-7.6%	31.0	NM	1.6x	PRIMEBANK	16,142	1.1%	3.7x	0.8x	HAMI	108.0	108.0	3.0	38	4.06
SIPLC	54.7	-7.1%	63.2	9.9x	2.0x	ROBI	14,876	1.1%	17.5x	2.4x	MONNOCERA	72.3	72.1	2.0	48	3.45
PRAGATIINS	68.4	-6.9%	87.9	12.3x	1.3x	UTTARABANK	13,699	1.0%	NM	0.7x	AL-HAJTEX	126.5	126.0	2.0	25	3.16
PEOPLESINS	35.6	-6.3%	38.1	11.1x	1.0x	NBL	13,055	0.9%	NM	NM	CITYGENINS	71.6	71.6	1.0	36	2.60
MIDLANDBNK	20.5	-6.0%	54.0	21.1x	1.4x	BSRMLTD	12,852	0.9%	4.2x	0.5x	DOMINAGE	23.0	21.5	2.0	106	2.32
PRAGATILIF	244.3	-5.9%	95.5	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					CENTRALINS	40.5	40.5	1.0	54	2.17

* 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
SIMTEX	30.0	28.0	30.1	1,071	5
ORIONINFU	470.5	464.5	14.3	31	6
GQBALLPEN	510.0	500.0	7.6	15	2
FINEFOODS	295.0	290.1	4.3	15	3
HAMI	108.0	108.0	4.1	38	3
MONNOCERA	72.3	72.1	3.4	48	2
AL-HAJTEX	126.5	126.0	3.2	25	2
CITYGENINS	71.6	71.6	2.6	36	1
DOMINAGE	23.0	21.5	2.3	106	2
CENTRALINS	40.5	40.5	2.2	54	1
SAPORTL	42.5	42.5	2.1	50	1
LOVELLO	90.0	87.0	2.0	23	2
AMANFEED	23.4	23.4	1.6	70	1
SIPLC	58.0	58.0	1.5	25	1
RAHIMAFOOD	149.0	149.0	1.2	8	1
PRAGATILIF	275.0	275.0	1.0	4	1
DBH1STMF	5.8	5.8	0.9	155	1
RUPALILIFE	100.0	100.0	0.9	9	1
ISNLTD	82.0	82.0	0.8	10	1
NCCBANK	12.0	12.0	0.7	60	1
BRACBANK	69.0	69.0	0.7	10	1
ASIATICLAB	59.3	59.3	0.7	12	1
Total			93.0		49

Important DSE News

SIPLC

(Q3 Un-audited): EPS was Tk. 0.81 for July-September, 2025 as against Tk. 0.97 for July-September, 2024; EPS was Tk. 4.28 for January-September, 2025 as against Tk. 3.03 for January-September, 2024. NOCFPS was Tk. 5.68 for January-September, 2025 as against Tk. 4.88 for January-September, 2024. NAV per share was Tk. 27.76 as on September 30, 2025 and Tk. 25.16 as on December 31, 2024. Reasons for deviation in EPS, NOCFPS and NAV per share: EPS has decreased due to payment of claim and management expenses. NOCFPS has increased due to increase in premium income. NAV per share is primarily attributable to a higher investment.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BSCPLC		0.0%	40.0%	Record Date	22-Oct-25
MONNOCERA		0.0%	2.0%	Record Date	23-Oct-25
DULAMIACOT		0.0%	3.0%	Record Date	23-Oct-25
ENVOYTEX		0.0%	30.0%	Record Date	26-Oct-25
IBNSINA		0.0%	64.0%	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
APEXFOODS		0.0%	20.0%	Record Date	30-Oct-25
APEXSPINN		0.0%	20.0%	Record Date	30-Oct-25
BDLAMPS		0.0%	10.0%	Record Date	3-Nov-25
LOVELLO		5.0%	11.0%	Record Date	6-Nov-25
INDEXAGRO		5.0%	12.0%	Record Date	9-Nov-25
LANKABAFIN		0.0%	0.0%	Record Date	10-Nov-25
APEXTANRY		0.0%	0.0%	Record Date	10-Nov-25
ANLIMAYARN		0.0%	0.0%	Record Date	10-Nov-25
BSRMSTEEL		0.0%	50.0%	Record Date	10-Nov-25
BSRMLTD		0.0%	50.0%	Record Date	10-Nov-25

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