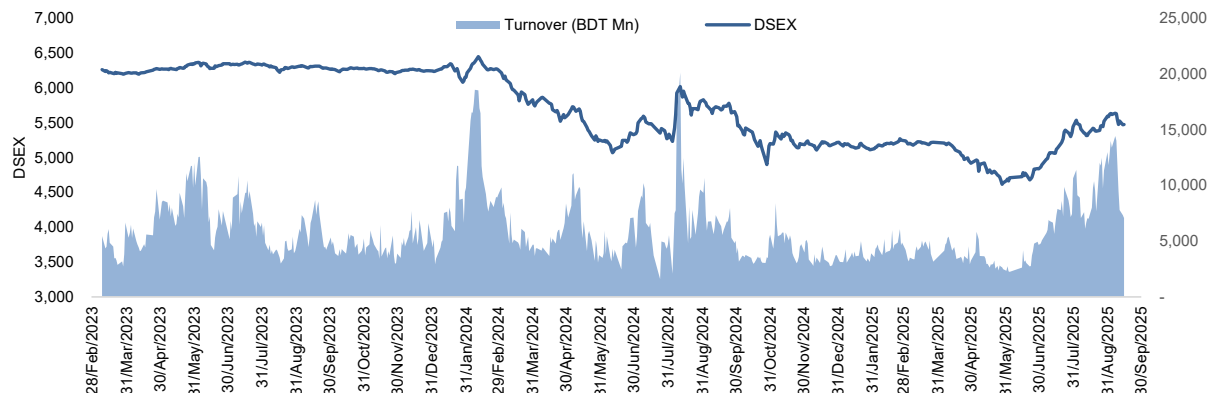


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.12%) gained 6.37 points and closed at 5,474.72. The blue-chip index DS30 (+0.28%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (+0.28%) closed at 2,135.04, 1,186.37, and 1,111.67 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 1.07%, followed by Engineering (+0.53%), Telecommunication (+0.32%), Fuel & Power (+0.10%), Pharmaceutical (-0.10%), Food & Allied (-0.17%), and NBFI (-1.36%), respectively. Block trades contributed 6.2% of the overall market turnover. Techno Drugs Ltd. (+6.4%) was the most traded share with a turnover of BDT 240 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 5,474.72 | 5,468.35 | +6.37 | +0.12% | +5.0% |
| DS30 | 2,135.04 | 2,129.05 | +6.00 | +0.28% | +10.1% |
| DSES | 1,186.37 | 1,185.40 | +0.97 | +0.08% | +1.5% |
| CDSET | 1,111.67 | 1,108.52 | +3.15 | +0.28% | +4.3% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 117 | 199 | 86 | 402 |
| A Category (Equity) | 72 | 109 | 43 | 224 |
| B Category (Equity) | 21 | 49 | 12 | 82 |
| N Category (Equity) | 0 | 0 | 0 | 0 |
| Z Category (Equity) | 24 | 41 | 31 | 96 |
| Mutual Funds | 4 | 12 | 20 | 36 |
| Corporate Bonds | 3 | 2 | 0 | 5 |
| Treasury Bonds | 1 | 2 | 0 | 3 |

* Based on Traded Scrips

| | | Today | Last Day | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap | Mn BDT | 7,244,462 | 7,222,998 | +0.3% |
| | Mn USD | 59,503 | 59,326 | |
| Turnover | Mn BDT | 7,063 | 7,326 | -3.6% |
| | Mn USD | 58 | 60 | |
| Volume | Mn Shares | 220 | 250 | -12.0% |
| No. of Trade | | 197,084 | 218,294 | -9.7% |

* Average Interbank Exchange Rate is BDT 121.75 as of Sep 15, 2025

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Figure: Sectorial Turnover (BDT Mn)

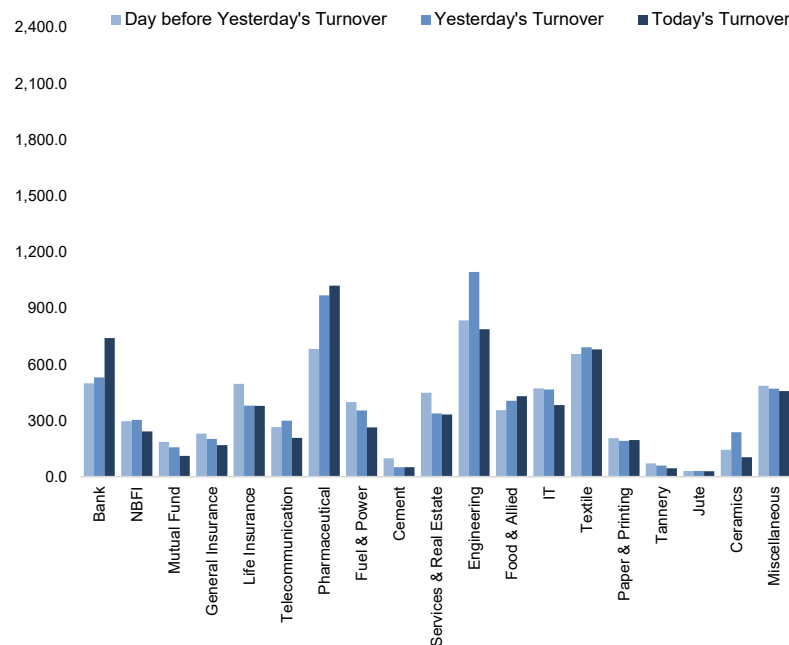
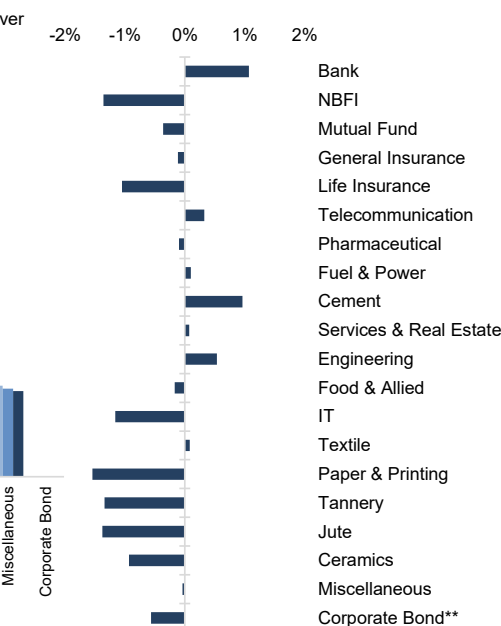


Figure: Sectorial Mcap Change



Market PE 16.6x

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 | 1,514 | 1,498 | +16.07 | +1.07% | 36 | 716,329 | 9.9% | 740.2 | 11.2% | NM | 0.8x | GP | 406,440 | 11.0% | 15.5 | 13.8x | 7.1x |
| NBFI | 1,127 | 1,143 | -15.54 | -1.36% | 23 | 107,396 | 1.5% | 241.7 | 3.6% | NM | NM | SQURPHARMA | 196,172 | 5.3% | 38.8 | 8.3x | 1.5x |
| Mutual Fund | 572 | 574 | -2.08 | -0.36% | 37 | 27,393 | 0.4% | 110.8 | 1.7% | NM | 0.5x | ROBI | 160,281 | 4.3% | 164.7 | 18.4x | 2.5x |
| General Insurance | 2,894 | 2,897 | -3.32 | -0.11% | 43 | 82,597 | 1.1% | 169.1 | 2.6% | 13.9x | 1.2x | BATBC | 153,900 | 4.2% | 20.7 | 12.4x | 2.9x |
| Life Insurance | 2,080 | 2,102 | -22.03 | -1.05% | 15 | 55,329 | 0.8% | 378.3 | 5.7% | NM | NM | BRACBANK | 142,948 | 3.9% | 54.4 | 10.1x | 1.7x |
| Telecommunication | 5,062 | 5,046 | +16.34 | +0.32% | 3 | 593,580 | 8.2% | 206.8 | 3.1% | 15.0x | 4.3x | WALTONHIL | 140,013 | 3.8% | 26.9 | 13.5x | 1.2x |
| Pharmaceutical | 3,149 | 3,152 | -3.03 | -0.10% | 34 | 596,946 | 8.2% | 1,019.7 | 15.4% | 13.7x | 1.7x | BEXIMCO | 103,850 | 2.8% | 0.1 | NM | 1.3x |
| Fuel & Power | 1,177 | 1,176 | +1.17 | +0.10% | 23 | 311,777 | 4.3% | 264.1 | 4.0% | 19.7x | 0.7x | MARICO | 90,405 | 2.5% | 22.0 | 14.8x | 27.1x |
| Cement | 2,056 | 2,036 | +19.58 | +0.96% | 7 | 97,970 | 1.4% | 50.6 | 0.8% | 22.6x | 2.2x | UPGDCL | 82,317 | 2.2% | 6.9 | 7.1x | 2.0x |
| Services & Real Estate | 1,105 | 1,104 | +0.81 | +0.07% | 9 | 60,766 | 0.8% | 332.9 | 5.0% | 26.9x | 0.5x | BERGERPBL | 70,934 | 1.9% | 7.1 | 20.2x | 4.1x |
| Engineering | 2,597 | 2,583 | +13.80 | +0.53% | 42 | 292,973 | 4.0% | 787.9 | 11.9% | 15.7x | 0.9x | LHB | 62,946 | 1.7% | 20.9 | 16.8x | 3.3x |
| Food & Allied | 14,854 | 14,879 | -25.19 | -0.17% | 21 | 271,780 | 3.7% | 430.3 | 6.5% | 20.6x | 4.3x | RENATA | 56,316 | 1.5% | 18.0 | 20.0x | 1.6x |
| IT | 2,061 | 2,086 | -24.26 | -1.16% | 11 | 27,190 | 0.4% | 382.6 | 5.8% | 22.9x | 1.7x | BXPHARMA | 55,764 | 1.5% | 47.4 | 8.7x | 1.1x |
| Textile | 1,218 | 1,217 | +1.02 | +0.08% | 58 | 126,844 | 1.7% | 680.3 | 10.3% | NM | 0.8x | UNILEVERCL | 47,317 | 1.3% | 0.4 | 74.5x | 25.9x |
| Paper & Printing | 5,337 | 5,421 | -83.65 | -1.54% | 6 | 24,113 | 0.3% | 195.3 | 2.9% | NM | 1.1x | ICB | 45,878 | 1.2% | 22.7 | NM | 1.1x |
| Tannery | 2,083 | 2,111 | -28.32 | -1.34% | 6 | 23,206 | 0.3% | 44.9 | 0.7% | NM | 1.7x | DUTCHBANGL | 40,408 | 1.1% | 4.2 | 10.8x | 0.8x |
| Jute | 13,586 | 13,775 | -189.50 | -1.38% | 3 | 2,991 | 0.0% | 30.0 | 0.5% | NM | NM | EBL | 40,374 | 1.1% | 7.4 | 5.8x | 0.9x |
| Ceramics | 435 | 439 | -4.09 | -0.93% | 5 | 19,503 | 0.3% | 104.5 | 1.6% | NM | 1.3x | CITYBANK | 39,856 | 1.1% | 95.8 | 3.7x | 0.7x |
| Miscellaneous | 4,168 | 4,170 | -1.68 | -0.04% | 15 | 226,344 | 3.1% | 457.1 | 6.9% | 89.7x | 1.8x | PUBALIBANK | 38,262 | 1.0% | 3.4 | 5.2x | 0.7x |
| Corporate Bond** | 16,431 | 16,525 | -93.35 | -0.56% | 16 | 36,276 | 0.5% | 0.1 | 0.0% | NM | NM | PRIMEBANK | 32,497 | 0.9% | 7.9 | 3.9x | 0.8x |
| Treasury Bond** | 2,306 | 2,280 | +26.44 | +1.16% | 236 | 3,550,292 | 49.0% | 1.1 | 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 |
|-----------------|-------------------|--------|-------------------|-------|------|----------------------------|--------------------------|----------------------------|-------|------|-------------------|-------------------|-------|-------------------|-------|-------|
| RUPALIBANK | 24.3 | +10.0% | 107.3 | NM | 1.7x | SQURPHARMA | 108,958 | 7.7% | 8.3x | 1.5x | TECHNODRUG | 38.2 | +6.4% | 240.4 | NM | 1.3x |
| MIDLANDBNK | 20.0 | +9.9% | 166.5 | 20.6x | 1.4x | ISLAMIBANK | 74,730 | 5.3% | NM | 1.0x | KBPPWBIL | 150.0 | -0.8% | 235.4 | NM | 12.5x |
| ASIATICLAB | 63.4 | +7.8% | 168.8 | 26.3x | 1.2x | BEXIMCO | 69,463 | 4.9% | NM | 1.3x | SAPORTL | 36.1 | +4.0% | 207.0 | 13.4x | 1.0x |
| SHYAMPSUG | 202.2 | +7.7% | 18.5 | NM | NM | BATBC | 50,233 | 3.6% | 12.4x | 2.9x | ASIATICLAB | 63.4 | +7.8% | 168.8 | 26.3x | 1.2x |
| FAREASTFIN | 1.5 | +7.1% | 0.3 | NM | NM | WALTONHIL | 46,773 | 3.3% | 13.5x | 1.2x | MIDLANDBNK | 20.0 | +9.9% | 166.5 | 20.6x | 1.4x |
| TECHNODRUG | 38.2 | +6.41% | 240.4 | NM | 1.3x | BRACBANK | 46,489 | 3.3% | 10.1x | 1.7x | ROBI | 30.6 | - | 164.7 | 18.4x | 2.5x |
| ZEALBANGLA | 108.8 | +6.3% | 4.8 | NM | NM | GP | 44,708 | 3.2% | 13.8x | 7.1x | PTL | 58.3 | +5.0% | 126.3 | 8.8x | 1.4x |
| BDFINANCE | 11.5 | +5.5% | 7.7 | NM | NM | RENATA | 32,968 | 2.3% | 20.0x | 1.6x | DOMINAGE | 18.3 | -4.2% | 120.7 | NM | 1.1x |
| ZAHINTEX | 6.2 | +5.1% | 1.9 | NM | 0.8x | BXPHARMA | 23,409 | 1.7% | 8.7x | 1.1x | FINEFOODS | 300.9 | -1.4% | 114.0 | 67.8x | 20.6x |
| PTL | 58.3 | +5.0% | 126.3 | 8.8x | 1.4x | PUBALIBANK | 22,905 | 1.6% | 5.2x | 0.7x | SALAMCRST | 23.9 | +0.4% | 110.6 | NM | 1.3x |

| Top Ten Losers | 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 | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|----------------|-------------------|-------|-------------------|-------|------|----------------------------|--------------------------|----------------------------|-------|------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| PRIMEFIN | 2.6 | -7.1% | 1.2 | NM | 0.4x | ALYMPIC | 20,496 | 1.5% | 17.2x | 2.6x | KBPPWBIL | 140.7 | 136.1 | 15.0 | 1,117 | 154.73 |
| ILFSL | 1.7 | -5.6% | 0.2 | NM | NM | OLYMPIC | 20,496 | 1.5% | 17.2x | 2.6x | ASIATICLAB | 63.8 | 53.8 | 18.0 | 2,087 | 123.06 |
| PREMIERLEA | 1.7 | -5.6% | 0.4 | NM | NM | ALARABANK | 18,282 | 1.3% | 36.9x | 0.8x | PRIMEBANK | 25.3 | 25.3 | 1.0 | 2,366 | 59.85 |
| TAMIJTEX | 154.5 | -5.3% | 23.1 | 22.9x | 1.5x | BEACONPHAR | 17,838 | 1.3% | 34.5x | 4.6x | SUNLIFEINS | 64.1 | 63.9 | 4.0 | 466 | 29.79 |
| MONNOFABR | 19.8 | -5.3% | 73.8 | NM | 0.8x | PRIMEBANK | 16,142 | 1.1% | 3.9x | 0.8x | PTL | 59.8 | 58.5 | 3.0 | 236 | 13.82 |
| GIB | 2.0 | -4.8% | 4.1 | NM | NM | ROBI | 14,876 | 1.1% | 18.4x | 2.5x | ORIONINFU | 519.8 | 480.5 | 3.0 | 24 | 11.84 |
| DOMINAGE | 18.3 | -4.2% | 120.7 | NM | 1.1x | UTTARABANK | 13,699 | 1.0% | NM | 0.8x | SHYAMPSUG | 181.3 | 181.0 | 8.0 | 36 | 6.43 |
| RUPALILIFE | 108.3 | -4.2% | 89.3 | NM | NM | NBL | 13,055 | 0.9% | NM | NM | LOVELLO | 98.0 | 94.0 | 2.0 | 56 | 5.42 |
| NHFIL | 25.9 | -4.1% | 52.4 | NM | 1.4x | BSRMLTD | 12,852 | 0.9% | 5.0x | 0.5x | SALVOCHEM | 34.5 | 28.5 | 2.0 | 95 | 3.08 |
| WATACHEM | 143.7 | -3.9% | 4.0 | NM | 2.4x | | | | | | RELANCE1 | 14.9 | 14.9 | 4.0 | 200 | 2.98 |

* 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 | 140.7 | 136.1 | 154.7 | 1,117 | 15 |
| ASIATICLAB | 63.8 | 53.8 | 123.1 | 2,087 | 18 |
| PRIMEBANK | 25.3 | 25.3 | 59.8 | 2,366 | 1 |
| SUNLIFEINS | 64.1 | 63.9 | 29.8 | 466 | 4 |
| PTL | 59.8 | 58.5 | 13.8 | 236 | 3 |
| ORIONINFU | 519.8 | 480.5 | 11.8 | 24 | 3 |
| SHYAMPSUG | 181.3 | 181.0 | 6.4 | 36 | 8 |
| LOVELLO | 98.0 | 94.0 | 5.4 | 56 | 2 |
| SALVOCHEM | 34.5 | 28.5 | 3.1 | 95 | 2 |
| RELIANCE1 | 14.9 | 14.9 | 3.0 | 200 | 4 |
| ACIFORMULA | 154.0 | 154.0 | 2.3 | 15 | 1 |
| SQURPHARMA | 223.5 | 223.5 | 2.2 | 10 | 1 |
| RUPALIBANK | 22.9 | 22.9 | 2.1 | 90 | 1 |
| JAMUNABANK | 22.0 | 22.0 | 1.8 | 83 | 2 |
| MONNOFABR | 18.9 | 18.9 | 1.7 | 88 | 1 |
| SIMTEX | 19.9 | 19.4 | 1.6 | 82 | 2 |
| BPML | 41.1 | 41.1 | 1.6 | 39 | 1 |
| EGEN | 30.5 | 30.5 | 1.5 | 50 | 1 |
| AL-HAJTEX | 170.0 | 170.0 | 1.3 | 8 | 1 |
| GENNEXT | 3.1 | 3.1 | 1.2 | 375 | 1 |
| BRACBANK | 72.9 | 72.9 | 0.9 | 13 | 1 |
| ZEALBANGLA | 94.1 | 94.1 | 0.8 | 9 | 1 |
| Total | | | 434.8 | | 82 |

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|------------|-------------|----------|--------|-------------|-----------|
| | | Stock | Cash | | |
| PREMIERBAN | | 0.0% | 0.0% | Record Date | 17-Sep-25 |
| ISLAMIBANK | | 0.0% | 0.0% | Record Date | 23-Sep-25 |
| 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 |

Important DSE News

MONOSPOOL

The company has informed that the Board of Directors of the company in its meeting held on September 14, 2025 adopted decision to procure Hot Stamping Machine, Inkjet Lithu Machines, Miyakoshi A4 Cutting Machines and 6TPH Steam Green Boiler to be financed by the company. The procurement of the above machineries/boiler will increase post-press production quality and efficiency, high-resolution printed images or text directly on paper, board or other substrates and will have positive impact on the revenue and profitability of the company. The Board believes that this acquisition is in conformity with the long term business goal of the company.

OLYMPIC

The company has informed that a loan agreement has been signed on September 14, 2025 at Amin Court, 6th Floor, 62-63, Motijheel, Dhaka-1000 between Olympic Industries PLC. and Bangladesh Infrastructure Finance Fund Limited (Funded by JICA: Japan International Cooperation Agency) under Food Value Chain Improvement Project (FVCIP) for a term loan facility of BDT 50.00 Crores in favour of Olympic Industries PLC. From Bangladesh Infrastructure Finance Fund Limited (BIFFL) for financing the BMRE (Expansion) of existing processing unit 1 and 2, project location Unit 1: Lolati, Kanchpur, Sonargaon, Narayanganj, Unit 2: Madanpur, Bondar, Narayanganj.

MAGURAPLEX

The Board of Directors of the company in its meeting held on September 14, 2025 has adopted decision to procure the following machines to be financed by the company: 1.KBA Machine (Sheet fed Offset Printing Machine), 2.Re-Winder Machine, 3.Folding Gluing Machine, 4.Die Cutting Machine, 5.Foil Stamping Machine, 6.Single Colour Printing Machine, 7.Folding (Vazal) Machine and 8.Sewing Machine. The procurement of the above machineries will increase production of packaging materials, commercial print products, rewinding large master rolls, carton boxes, cutting materials into specific shapes and sizes. The addition of these machines will have positive impact on the revenue and profitability of the company.

GHAILE

The company has informed that the Board of Directors of the company in its meeting held on September 14, 2025 has decided to formally launch an e-commerce platform named <https://goldenharvestshops.com> to reach its online-based customers.

PROVATIINS

Mr. Md. Momin Ali, a Director of the company, has expressed his intention to buy 140,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

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