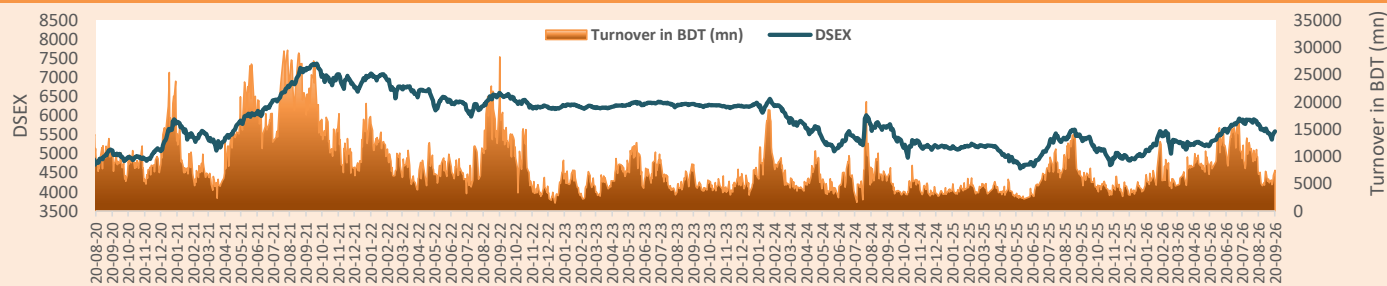


RECENT MARKET MOVEMENT



DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	5,592	5,532	▲ 60.1	1.1%	-3.4%	14.9%	3.9%
DS30	2,121	2,101	▲ 20.0	1.0%	-1.9%	14.4%	1.8%
DSMEX (SME)	1,044	1,034	▲ 10.2	1.0%	-2.6%	22.0%	9.3%
Market Cap (BDT bn)	6,946	6,924	▲ 21.8	0.3%	-1.3%	2.4%	-3.6%
Turnover (BDT mn)	7,474	6,554	▲ 919.6	14.0%	11.2%	111.1%	20.3%
Total Trade	201,639	183,531	▲ 18,108.0	9.9%	10.1%	75.6%	10.1%
Volume (mn)	278	230	▲ 47.4	20.6%	23.9%	137.3%	34.6%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	9,107	9,022	▲ 85.5	0.9%	-3.4%	8.5%	-2.5%
CASPI	14,856	14,736	▲ 119.9	0.8%	-4.1%	9.1%	-2.3%
Market Cap (BDT bn)	9,518	9,503	▲ 14.7	0.2%	-0.7%	39.0%	31.6%
Turnover (BDT mn)	101	171	▼ (70.5)	-41.1%	-46.6%	90.6%	-32.1%
Total Trade	1,611	1,449	▲ 162.0	11.2%	-0.9%	79.2%	-11.6%
Volume ('000)	2,297	3,359	▼ (1,061.5)	-31.6%	-56.5%	130.9%	9.3%

TODAY'S MARKET COMMENTARY

The benchmark index of the capital bourse commenced the week by extending its recovery for a fourth consecutive session, as strong buying interest persisted with bargain hunters accumulating beaten-down scrips despite lingering concerns over the market's near-term trajectory amid heightened geopolitical tensions in the Gulf region. DSEX, the broad index of the Dhaka Stock Exchange, gained 60.1 points to settle at 5,592 points compared to 5,532 points in the previous trading session. The market opened on a positive note and maintained its buoyant momentum throughout the session, as robust investor participation and broad-based accumulation culminated in strong late-session buying, lifting the benchmark index close to the 5,600-mark following its recent declines. Meanwhile, market turnover also increased by 14.0% to BDT 7.5 billion from BDT 6.6 billion in the previous session. On the sectoral front, Textile (24.0%) accounted for the highest share of turnover, followed by General Insurance (13.2%) and Bank (12.0%). All the sectors displayed positive returns, where Mutual Fund (2.8%), Cement (2.6%) and Financial Institution (2.6%) exhibited the most gains on the bourse today. Of the 395 issues traded, 285 advanced, 58 declined and 52 remained unchanged.

The port city bourse, CSE, also settled on a positive zone. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) advanced by 85.5 points and 119.9 points, respectively.

Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

*Turnover includes block trade in DSE; **Return means Capital gain plus any dividend yield;

PE1=PE excludes stocks with negative earnings but includes MFs;

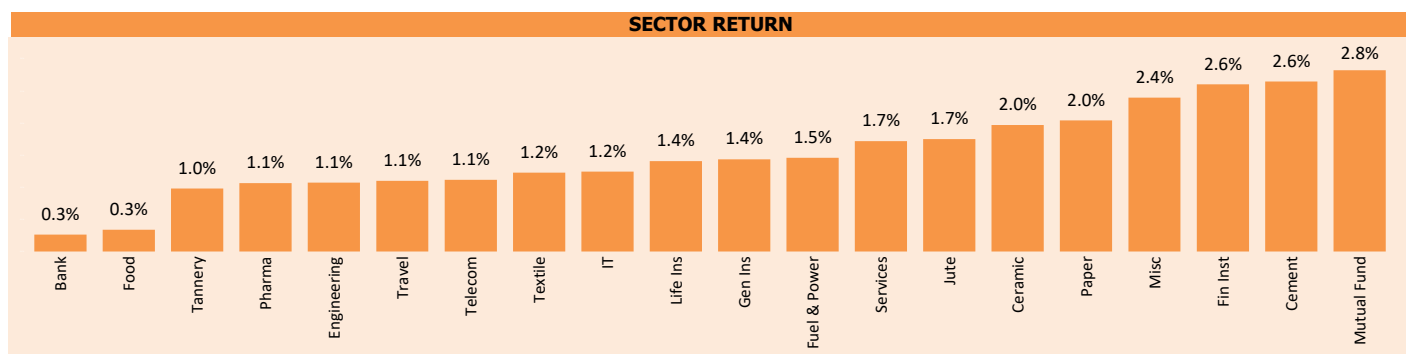
> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

DAILY MARKET REVIEW

Sunday, September 20, 2026

MARKET VALUATION			SCRIP WISE PERFORMANCE			
	Today	Yday	Advanced	Declined	Unchanged	
Market P/NAVPS	1.24	1.23	↑ 285	↓ 58	— 52	
Market Fw. P/E ₁	10.22	10.11				

DAY'S SECTOR MOVEMENT							
Sector	Turnover (mn)	% of T/O	M. Cap (mn)	% of M. Cap	T.PE (x)	F. P/E (x)	P/NAV (x)
Bank	899.7	12.0%	719,847	20.6%	4.7	6.0	0.8
Cement	71.6	1.0%	95,008	2.7%	14.7	16.4	2.1
Ceramics	56.7	0.8%	20,416	0.6%	n/a	360.2	1.3
Engineering	360.9	4.8%	294,954	8.5%	34.0	12.1	0.9
Financial Institutions	298.1	4.0%	104,980	3.0%	11.9	21.2	n/a
Food & Allied	344.8	4.6%	229,844	6.6%	36.3	19.4	3.6
Fuel & Power	172.4	2.3%	291,518	8.4%	10.0	6.6	0.6
General Insurance	988.4	13.2%	125,770	3.6%	21.7	15.7	1.7
IT	167.2	2.2%	32,249	0.9%	31.5	27.9	1.9
Jute	24.0	0.3%	2,876	0.1%	23.3	35.4	1.8
Life Insurance	101.8	1.4%	47,869	1.4%	38.6	n/a	n/a
Miscellaneous	352.4	4.7%	135,427	3.9%	54.8	13.1	1.0
Mutual Fund	565.1	7.6%	32,026	0.9%	7.3	15.6	0.7
Paper & Printing	61.4	0.8%	20,995	0.6%	33.1	39.0	1.4
Pharma. & Chemicals	891.0	11.9%	583,152	16.7%	22.5	10.4	1.5
Services & Real Estate	214.6	2.9%	27,758	0.8%	20.2	17.1	1.1
Tannery	32.2	0.4%	24,551	0.7%	49.8	21.7	1.5
Telecommunication	42.0	0.6%	514,504	14.8%	11.4	12.8	3.5
Textile	1,794.7	24.0%	146,982	4.2%	25.2	23.9	1.0
Travel & Leisure	32.8	0.4%	35,387	1.0%	54.3	24.1	0.3
Equity Market	7,471.7	100.0%	3,486,112	100.0%			



TODAY'S INDEX (DSEX) PULLER ^{>}			TODAY'S INDEX (DSEX) DRAGGER ^{>}		
TICKER	%Δ in M.Cap	(+)ve Cont.	TICKER	%Δ in M.Cap	(-)ve Cont.
SQURPHARMA	1.0%	4.1	UCB	-2.2%	(1.6)
PUBALIBANK	1.8%	2.8	ALARABANK	-2.5%	(1.5)
LHB	2.9%	2.5	ISLAMIBANK	-0.7%	(1.3)
BEACONPHAR	2.9%	1.6	PTL	-4.3%	(1.0)
PRIMEBANK	1.4%	1.3	JAMUNABANK	-1.7%	(0.9)
IDLC	2.6%	1.3	SOUTHEASTB	-1.6%	(0.8)
MTB	3.1%	1.3	ABBANK	-4.3%	(0.6)
GP	0.9%	1.2	IFIC	-1.9%	(0.5)
LOVELLO	8.7%	1.2	MERCANBANK	-1.5%	(0.3)
BSRMSTEEL	3.3%	1.2	ASIATICLAB	-0.8%	(0.3)

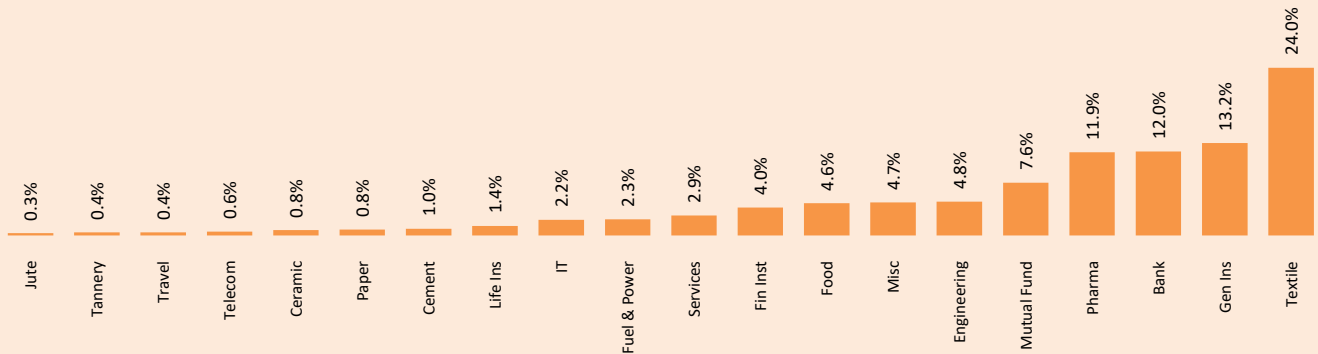
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

Note: Disclaimer has been annexed at the end of the report.

DAILY MARKET REVIEW

Sunday, September 20, 2026

TURNOVER DISTRIBUTION



TOP GAINERS**

KBPPWBIL	9.88%
ICBSONALI1	9.86%
1STPRIMFMF	9.75%
NFML	9.46%
MBL1STMF	9.38%
DGIC	8.94%
LOVELLO	8.75%
ORIONINFU	8.70%
MEGHNAPE	8.33%
YPL	8.29%
BEXIMCO	7.96%
BDWELDING	7.63%
SONARGAON	7.51%
QUEENSOUTH	7.14%
GLDNJMF	7.06%
EBL1STMF	6.98%
NURANI	6.90%
OIMEX	6.67%
ETL	6.52%
DSSL	6.42%

TOP LOSERS**

PTL	-4.31%
ABBANK	-4.26%
RAHIMAFOD	-3.66%
DSHGARME	-2.88%
SHYAMPSUG	-2.78%
BIFC	-2.63%
ALARABANK	-2.50%
RUPALIBANK	-2.33%
UCB	-2.15%
GBBPOWER	-2.14%
ATLASBANG	-2.14%
IFIC	-1.92%
DACCADYE	-1.85%
JAMUNABANK	-1.70%
RAHIMTEXT	-1.69%
REGENTTEX	-1.64%
SOUTHEASTB	-1.63%
ZEALBANGLA	-1.61%
SIPLC	-1.59%
HFL	-1.57%

TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
EBL	369.4	4.9%	22.9
SHARPIND	258.4	3.5%	20.3
IPDC	240.7	3.2%	33.7
PTL	229.4	3.1%	77.7
BNICL	199.8	2.7%	150.0
SAIHAMTEX	186.2	2.5%	35.5
ASIATICLAB	177.1	2.4%	109.1
LOVELLO	171.7	2.3%	54.7
ENVOYTEX	162.5	2.2%	72.3
MALEKSPIN	149.9	2.0%	48.4
RELIANCINS	144.1	1.9%	112.7
SAIHAMCOT	142.2	1.9%	23.0
SAPORTL	139.4	1.9%	61.6
NAVANAPHAR	127.4	1.7%	65.4
ETL	124.7	1.7%	14.7
MBL1STMF	108.8	1.5%	10.5
BEXIMCO	97.1	1.3%	21.7
BRACBANK	95.0	1.3%	64.0
TRUSTBANK	83.7	1.1%	13.9
KBPPWBIL	82.7	1.1%	37.8

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	327,178	9.3%	242.3
SQURPHARMA	191,385	5.5%	215.9
ROBI	159,233	4.6%	30.4
BRACBANK	146,532	4.2%	64.0
WALTONHIL	131,489	3.8%	394.6
BATBC	124,524	3.6%	230.6
MARICO	84,102	2.4%	2,669.9
BERGERPBL	72,323	2.1%	1,472.8
UPGDCL	67,477	1.9%	116.4
BXPHARMA	65,891	1.9%	147.7
LHB	62,714	1.8%	54.0
PUBALIBANK	59,267	1.7%	39.6
CITYBANK	52,832	1.5%	30.2
RENATA	51,980	1.5%	453.2
DUTCHBANGL	45,435	1.3%	47.0
ISLAMIBANK	42,987	1.2%	26.7
UNILEVERCL	38,053	1.1%	1,974.3
EBL	37,640	1.1%	22.9
PRIMEBANK	36,595	1.0%	28.6
ICB	35,037	1.0%	40.4

DAILY MARKET REVIEW

Sunday, September 20, 2026

UPCOMING DIVIDENDS							
Ticker	Period	Cash Div	Bonus Div	EPS (BDT)	NAVPS (BDT)	Record Date	AGM Date
WALTONHIL	FY'26	180.00%	10%	33.8	381.3	20-Sep-26	15-Oct-26
AAMRANET	FY'25	0.10%	-	0.1	36.1	24-Sep-26	n/a

TOP BLOCK TRANSACTIONS (DSE)				UPCOMING BOARD MEETING DATE		
Ticker	Volume ('000)	Value (mn)	Price Range	Ticker	Period	Meeting Date
TRUSTBANK	2,400.0	34.2	14 - 15	APEXFOOT	FY'26	26-Sep-26
GQBALLPEN	50.8	28.5	550 - 581.6	ENVOYTEX	FY'26	27-Sep-26
BNICL	86.5	13.4	146 - 158			
IPDC	330.0	9.9	30 - 30			
MALEKSPIN	195.0	9.7	45.4 - 51.5			
PTL	68.9	6.1	87.2 - 89.3			
ISLAMIINS	89.0	5.4	60.6 - 61.8			
SPCL	104.5	5.2	49.5 - 49.5			
SOUTHEASTB	290.0	3.7	12.9 - 12.9			
NITOLINS	70.1	3.7	52.5 - 53			
ETL	240.0	3.4	13.9 - 14			
NAVANAPHAR	50.9	3.1	60.1 - 60.6			
UTTARABANK	110.1	2.5	22.8 - 22.8			
DOMINAGE	31.0	2.1	65 - 67.4			
APEXSPINN	6.3	2.0	320 - 320			
UNITEDFIN	101.5	1.8	18.1 - 18.1			
FINEFOODS	4.0	1.8	441.6 - 441.6			
SHASHADNIM	50.0	1.4	27.5 - 27.5			
PEOPLESINS	10.0	0.7	65 - 65			
PARAMOUNT	10.0	0.6	58.5 - 58.5			
LOVELLO	10.0	0.5	50.8 - 50.8			
CONFIDCEM	8.7	0.5	58 - 58			
PRIME1ICBA	77.0	0.5	6.5 - 6.5			
SONARGAON	5.3	0.5	94 - 94			
-	-	-	-			
-	-	-	-			
-	-	-	-			
-	-	-	-			
-	-	-	-			

SELECTED NEWS IN BRIEF

GOVT BORROWS INCREASINGLY FROM BANKS TO RUN AND FUND DEBT REPAYMENT:
Current financial year's opening two month's borrowing of Tk 128.72 billion takes government's bank debt to a worrying total of Tk 6.98 trillion, as it turns increasingly to commercial lenders to meet financing needs. A good sum of the money it borrowed at the outset of the fiscal year 2026-27, however, went for repaying back loans taken from the central bank of Bangladesh. The government borrowed Tk 128.72 billion from the banking system during July-August while repaid Tk 37.28 billion to the central bank during the same period, according to Bangladesh Bank (BB) data.
Source:<https://thefinancialexpress.com.bd/bangladesh/govt-borrows-increasingly-from-banks-to-run-and-fund-debt-repayment>

TOP BLOCK TRANSACTIONS (CSE)			
Ticker	Volume ('000)	Value (mn)	Price Range
CITYGENINS	256.0	29.7	116 - 116.2
EBL	400.0	8.6	21.6 - 21.6
NITOLINS	134.2	7.1	53 - 53
GQBALLPEN	11.7	6.4	550 - 551
PTL	49.5	4.0	81 - 81
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
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GENERAL DISCLOSURE

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