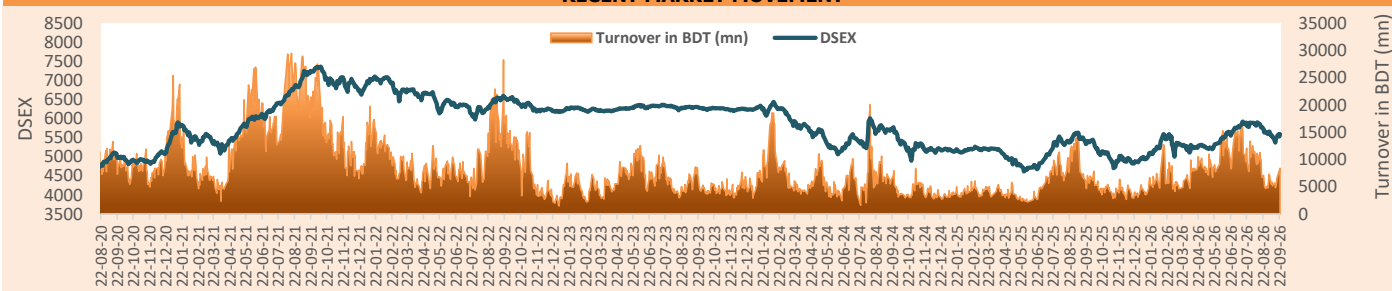




DAILY MARKET REVIEW

Wednesday, September 23, 2026

RECENT MARKET MOVEMENT



DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	5,596	5,540	▲ 55.9	1.0%	-0.8%	15.0%	4.7%
DS30	2,123	2,106	▲ 16.6	0.8%	-0.4%	14.5%	2.4%
DSMEX (SME)	1,031	1,019	▲ 12.3	1.2%	-3.4%	20.4%	10.5%
Market Cap (BDT bn)	6,944	6,914	▲ 29.9	0.4%	-0.2%	2.4%	-3.1%
Turnover (BDT mn)	8,447	7,915	▲ 532.1	6.7%	40.3%	138.6%	80.6%
Total Trade	217,984	201,745	▲ 16,239.0	8.0%	13.6%	89.9%	38.5%
Volume (mn)	268	290	▼ (21.8)	-7.5%	19.1%	129.1%	61.2%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	9,130	9,092	▲ 38.3	0.4%	-1.9%	8.8%	-1.2%
CASPI	14,871	14,816	▲ 54.9	0.4%	-2.5%	9.3%	-1.0%
Market Cap (BDT bn)	9,523	9,514	▲ 9.1	0.1%	0.0%	39.1%	32.3%
Turnover (BDT mn)	243	192	▲ 51.4	26.8%	64.1%	359.1%	91.5%
Total Trade	1,652	1,915	▼ (263.0)	-13.7%	-11.2%	83.8%	-8.4%
Volume ('000)	9,084	4,865	▲ 4,219.7	86.7%	178.7%	813.0%	206.1%

TODAY'S MARKET COMMENTARY

Market recovery resumed after a brief faltering momentum following the fuel price hike as investors reinstated buying interest in perceived attractive scrips, defying prevailing concerns over the market's trajectory amid persistent economic challenges. DSEX, the broad index of the Dhaka Stock Exchange, recovered 55.9 points to settle at 5,596 points compared to 5,540 points in the previous trading session. The market opened on a firm footing and maintained its upbeat momentum throughout the session, driving price appreciation across most scrips that ultimately pushed market indices to close in positive territory. Market turnover increased by 6.7% to BDT 8.4 billion from BDT 7.9 billion in the previous session. On the sectoral front, Textile (19.9%) accounted for the highest share of turnover, followed by Pharma (16.8%) and General Insurance (11.8%). Sectors mostly posted positive returns, where Travel (5.6%), Paper (5.0%) and Life Insurance (3.1%) exhibited the most gains while Mutual Funds (-2.4%) and General Insurance (-0.5%) posted marginal corrections on the bourse today. Of the 395 issues traded, 246 advanced, 100 declined and 49 remained unchanged. The port city bourse, CSE, also ended in positive terrain. The selected indices (CSCX) and All Share Price Index (CASPI) gained 38.3 points and 54.9 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;

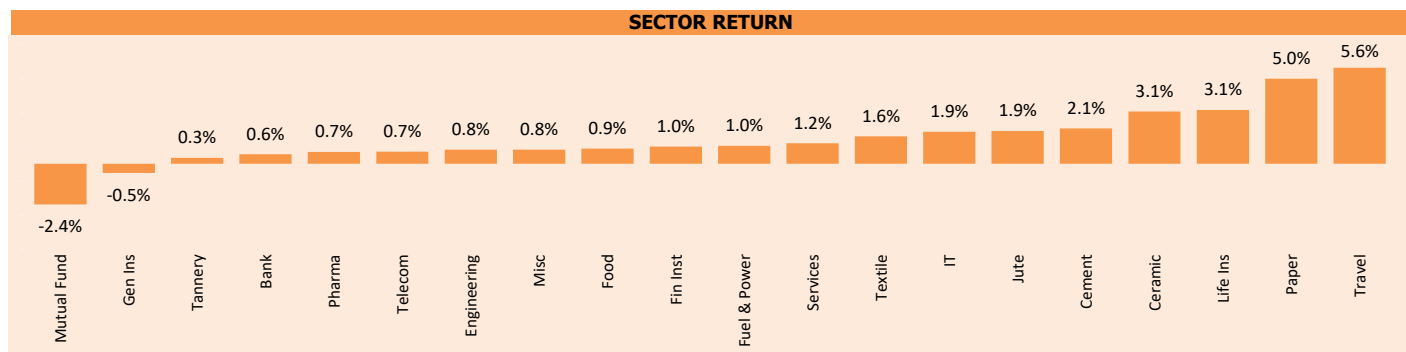
> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Govt holding;

DAILY MARKET REVIEW

Wednesday, September 23, 2026

MARKET VALUATION			SCRIP WISE PERFORMANCE			
	Today	Yday	Advanced	Declined	Unchanged	
Market P/NAVPS	1.24	1.23				
Market Fw. P/E ₁	10.18	10.09	↑ 246	↓ 100	— 49	

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	713.0	8.4%	717,098	20.6%	4.7	5.9	0.8
Cement	81.2	1.0%	95,666	2.7%	14.9	16.6	2.2
Ceramics	163.4	1.9%	20,803	0.6%	n/a	367.0	1.4
Engineering	648.4	7.7%	291,983	8.4%	33.5	11.4	0.8
Financial Institutions	272.4	3.2%	103,943	3.0%	11.7	21.0	n/a
Food & Allied	295.9	3.5%	229,760	6.6%	36.7	19.3	3.6
Fuel & Power	164.8	2.0%	290,560	8.3%	10.0	6.6	0.6
General Insurance	999.6	11.8%	126,251	3.6%	22.0	15.8	1.7
IT	273.0	3.2%	32,401	0.9%	31.8	28.0	1.9
Jute	32.3	0.4%	2,909	0.1%	23.6	35.8	1.8
Life Insurance	158.9	1.9%	48,507	1.4%	38.4	n/a	n/a
Miscellaneous	483.0	5.7%	135,769	3.9%	57.5	13.2	1.0
Mutual Fund	613.7	7.3%	32,422	0.9%	7.3	15.8	0.7
Paper & Printing	118.7	1.4%	21,572	0.6%	33.9	40.1	1.4
Pharma. & Chemicals	1,418.9	16.8%	585,393	16.8%	23.3	10.4	1.5
Services & Real Estate	81.0	1.0%	27,663	0.8%	20.1	17.0	1.1
Tannery	44.1	0.5%	24,282	0.7%	49.3	21.5	1.5
Telecommunication	47.6	0.6%	513,558	14.7%	11.5	12.8	3.5
Textile	1,680.7	19.9%	145,995	4.2%	24.8	23.7	1.0
Travel & Leisure	156.2	1.8%	36,407	1.0%	53.2	24.8	0.3
Equity Market	8,446.8	100.0%	3,482,940	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.
BRACBANK	1.3%	3.9	WALTONHIL	-0.7%	(1.1)
UNIQUEHRL	10.0%	2.2	ASIATICLAB	-1.8%	(0.5)
SQURPHARMA	0.5%	2.1	CITYBANK	-0.3%	(0.5)
EBL	1.8%	1.8	JAMUNABANK	-0.9%	(0.5)
LHB	1.9%	1.7	SOUTHEASTB	-0.8%	(0.4)
ORIONPHARM	10.0%	1.6	STANDBANKL	-2.2%	(0.3)
MATINSPINN	9.5%	1.5	PTL	-1.0%	(0.2)
BEACONPHAR	2.5%	1.4	LOVELLO	-1.5%	(0.2)
BATBC	1.1%	1.3	SIPLC	-2.0%	(0.2)
GP	1.0%	1.3	GREENDELTA	-0.9%	(0.2)

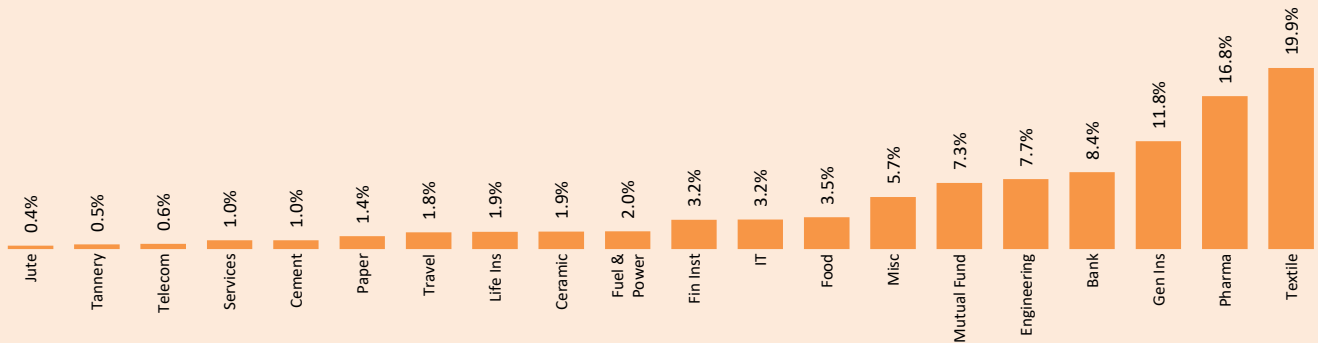
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

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

DAILY MARKET REVIEW

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TURNOVER DISTRIBUTION



TOP GAINERS**

ORIONPHARM	10.00%
UNIQUEHRL	9.95%
INDEXAGRO	9.94%
CLICL	9.93%
SEAPEARL	9.91%
BPML	9.80%
MATINSPINN	9.55%
TOSRIFA	9.52%
APEXSPINN	8.72%
MONNOFABR	7.89%
1STPRIMFMF	7.69%
TILIL	7.39%
CNATEX	7.14%
BDTHAI	6.80%
BENGALWTL	6.57%
PREMIERCEM	6.47%
AZIZPIPES	6.35%
YPL	6.31%
MONNOCERA	6.31%
MIRAKHTER	6.12%

TOP LOSERS**

ABB1STMF	-5.26%
RELIANCE1	-5.22%
GLDNJMF	-5.21%
ICB3RDNRB	-4.69%
IFIC1STMF	-4.65%
PRIME1ICBA	-4.35%
NCCBLMF1	-4.29%
EXIM1STMF	-4.29%
LRGLOBMF1	-4.26%
GREENDELMF	-3.85%
PF1STMF	-3.78%
ICBAGRANI1	-3.57%
PRIMEFIN	-3.45%
NURANI	-3.33%
CAPITECGBF	-3.26%
AIBL1STMF	-3.23%
GRAMEENS2	-3.08%
AAMRANET	-3.08%
ICBEPMF1S1	-2.99%
PHOENIXFIN	-2.86%

TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
SQURPHARMA	354.7	4.2%	217.1
BXPBARMA	260.4	3.1%	149.4
DOMINAGE	253.7	3.0%	67.7
ORIONINFU	244.1	2.9%	273.0
MALEKSPIN	235.9	2.8%	47.3
IPDC	207.4	2.5%	33.6
SAIHAMTEX	195.8	2.3%	37.4
APEXSPINN	175.0	2.1%	354.2
BNICL	168.6	2.0%	156.3
ENVOYTEX	160.3	1.9%	71.4
SHARPIND	158.1	1.9%	19.7
PRIMEBANK	153.5	1.8%	28.4
PTL	151.3	1.8%	77.5
1STPRIMFMF	146.5	1.7%	33.6
KBPPWBIL	133.2	1.6%	39.7
GQBALLPEN	127.0	1.5%	612.1
ACMEPL	126.9	1.5%	26.3
LOVELLO	108.8	1.3%	53.9
BRACBANK	101.4	1.2%	64.5
JAMUNABANK	100.5	1.2%	23.0

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	328,663	9.4%	243.4
SQURPHARMA	192,449	5.5%	217.1
ROBI	157,138	4.5%	30.0
BRACBANK	147,677	4.2%	64.5
WALTONHIL	126,787	3.6%	345.9
BATBC	124,146	3.6%	229.9
MARICO	83,799	2.4%	2,660.3
BERGERPBL	71,901	2.1%	1,464.2
UPGDCL	66,665	1.9%	115.0
BXPBARMA	66,649	1.9%	149.4
LHB	63,295	1.8%	54.5
PUBALIBANK	59,716	1.7%	39.9
CITYBANK	52,132	1.5%	29.8
RENATA	51,487	1.5%	448.9
DUTCHBANGL	44,082	1.3%	45.6
ISLAMIBANK	43,470	1.2%	27.0
UNILEVERCL	38,298	1.1%	1,987.0
EBL	38,134	1.1%	23.2
PRIMEBANK	36,339	1.0%	28.4
POWERGRID	34,816	1.0%	38.1

DAILY MARKET REVIEW

Wednesday, September 23, 2026

UPCOMING DIVIDENDS							
Ticker	Period	Cash Div	Bonus Div	EPS (BDT)	NAVPS (BDT)	Record Date	AGM Date
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
PRIMEBANK	4,900.4	138.2	28.2 - 28.2	APEXFOOT	FY'26	26-Sep-26
ALARABANK	4,169.0	65.5	15.7 - 15.7	ENVOYTEX	FY'26	27-Sep-26
GQBALLPEN	102.5	57.7	551 - 575.1			
MALEKSPIN	1,058.0	54.7	51.7 - 51.7			
JAMUNABANK	2,150.0	49.9	23.2 - 23.2			
SAIHAMTEX	1,082.0	39.5	36 - 36.5			
DAFODILCOM	163.5	26.2	160 - 161.1			
BNICL	118.9	17.5	145 - 148			
TRUSTBANK	734.7	10.3	13.9 - 14.5			
NITOLINS	150.0	8.7	57.8 - 58			
IPDC	185.0	6.7	36 - 36.3			
PTL	60.0	4.7	73.8 - 79.5			
ASIATICLAB	35.0	4.0	114 - 115.9			
SONALILIFE	46.5	4.0	85 - 85			
ICICL	100.0	3.5	35 - 35			
CITYGENINS	24.9	2.9	118.1 - 118.1			
DGIC	74.3	2.7	34.5 - 38.5			
APEXSPINN	8.4	2.7	320 - 320			
CAPMIBBLMF	109.5	1.5	13.1 - 14.5			
PRAGATILIF	11.5	1.5	126.7 - 126.7			
DOMINAGE	21.0	1.4	64.8 - 67.3			
EBL	62.0	1.3	21.5 - 21.5			
GLDNJMF	113.0	1.2	10.5 - 10.5			
ISLAMIINS	15.3	1.0	63.2 - 63.2			
TECHNODRUG	20.0	0.8	40.4 - 40.4			
BXPHERMA	3.4	0.6	163.6 - 163.6			
ENVOYTEX	7.9	0.5	64 - 64			
ANWARGALV	4.0	0.5	126 - 126			
-	-	-	-			

SELECTED NEWS IN BRIEF

ADB CUTS BANGLADESH GROWTH FORECAST TO 4% FOR FY27

The Asian Development Bank (ADB) has trimmed its economic growth projection for Bangladesh for fiscal year 2026–27 to 4 percent, down from its earlier forecast of 4.5 percent made in July, citing persistent banking-sector stress, structural bottlenecks and severe energy shortages. In its latest Asian Development Outlook (ADO) update, the Manila-based lender warned that economic expansion will remain constrained as high non-performing loans (NPLs), weak bank balance sheets, elevated borrowing costs and banks' preference for safer government securities continue to limit private-sector access to credit. "The downgrade for FY2027 reflects trade headwinds, energy import volatility and weather-related disruptions impacting agriculture and output across South Asia," the ADB said in the ADO released today.

Source: <https://www.thedailystar.net/business/news/adb-cuts-bangladesh-growth-forecast-4-fy27-4280746>

TOP BLOCK TRANSACTIONS (CSE)			
Ticker	Volume ('000)	Value (mn)	Price Range
GQBALLPEN	78.9	44.9	545 - 585
PREMIERBANK	4,200.0	26.9	6.4 - 6.4
NITOLINS	30.0	1.7	57 - 57.5
APEXFOOT	3.5	0.7	205 - 205
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GENERAL DISCLOSURE

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