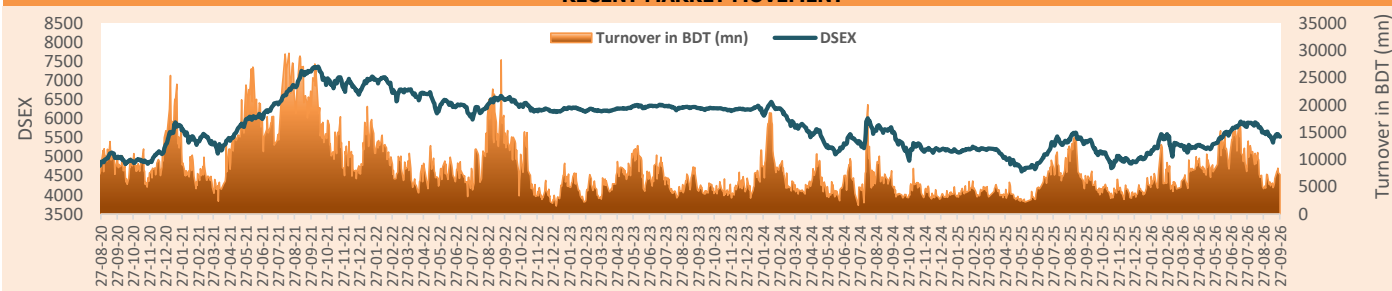


RECENT MARKET MOVEMENT



DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	5,533	5,578	▼ (45.6)	-0.8%	-2.2%	13.7%	2.8%
DS30	2,099	2,112	▼ (12.8)	-0.6%	-1.7%	13.3%	0.6%
DSMEX (SME)	1,037	1,031	▲ 6.0	0.6%	-3.4%	21.1%	8.8%
Market Cap (BDT bn)	6,884	6,906	▼ (21.5)	-0.3%	-1.3%	1.5%	-4.7%
Turnover (BDT mn)	7,274	7,563	▼ (289.1)	-3.8%	55.8%	105.5%	28.9%
Total Trade	203,481	202,860	▲ 621.0	0.3%	38.0%	77.2%	22.5%
Volume (mn)	254	238	▲ 16.1	6.7%	43.3%	117.4%	52.4%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	9,057	9,148	▼ (90.3)	-1.0%	-2.2%	7.9%	-2.0%
CASPI	14,783	14,912	▼ (128.9)	-0.9%	-2.5%	8.6%	-1.6%
Market Cap (BDT bn)	9,529	9,547	▼ (18.5)	-0.2%	0.1%	39.1%	32.4%
Turnover (BDT mn)	395	167	▲ 228.1	136.4%	86.2%	645.8%	198.5%
Total Trade	1,479	1,325	▲ 154.0	11.6%	-0.5%	64.5%	-8.7%
Volume ('000)	7,863	2,902	▲ 4,960.6	170.9%	207.5%	690.2%	217.9%

TODAY'S MARKET COMMENTARY

The benchmark index of the capital bourse commenced the week in negative territory for a second consecutive session, as investors continued to book profits amid limited conviction over the sustainability of the market's upward trajectory and apprehension of weaker corporate earnings. DSEX, the broad index of the Dhaka Stock Exchange, lost 45.6 points to settle at 5,533, compared with 5,578 in the previous trading session. The market faced sustained selling pressure throughout the session, as cautious investors largely remained on the sidelines, monitoring market direction amid a lack of fresh positive catalysts for a sustained recovery and uncertainty surrounding the upcoming earnings season. Meanwhile, market turnover also declined 3.8% to BDT 7.3 billion from BDT 7.6 billion in the previous session. On the sectoral front, Textile (19.2%) accounted for the highest share of turnover, followed by General Insurance (17.1%) and Pharma (14.7%). Sectors mostly posted negative returns, where Cement (-3.3%), Life Insurance (-2.2%) and IT (-1.9%) exhibited the most corrections while Jute (2.8%), Mutual Fund (2.8%) and General Insurance (0.6%) posted the most returns on the bourse today. Of the 395 issues traded, 75 advanced, 273 declined and 47 remained unchanged.

The port city bourse, CSE, also ended in negative terrain. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) plummeted by 90.3 points and 128.9 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;

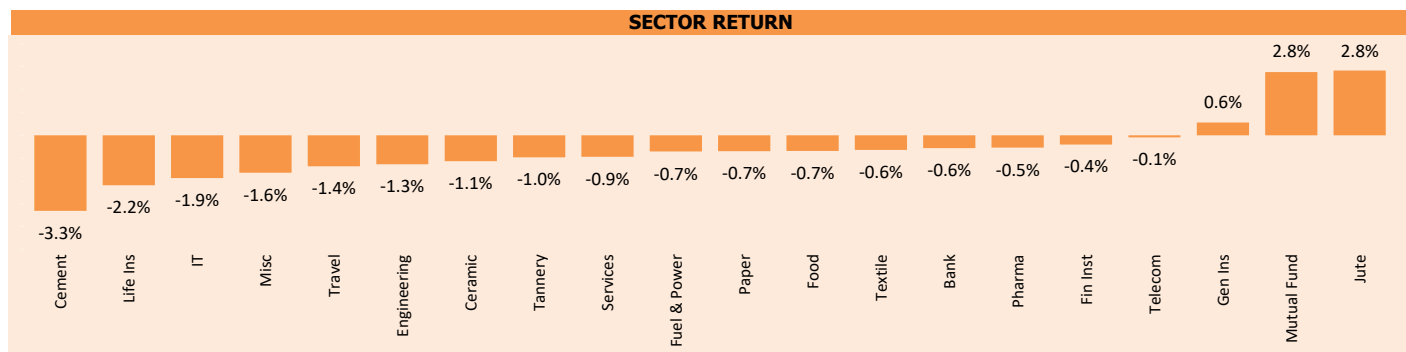
> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

DAILY MARKET REVIEW

Sunday, September 27, 2026

MARKET VALUATION			SCRIP WISE PERFORMANCE				
	Today	Yday	Advanced		Declined		Unchanged
Market P/NAVPS	1.23	1.23	↑	75	↓	273	— 47
Market Fw. P/E ₁	10.08	10.15					

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	404.8	5.6%	709,874	20.6%	4.6	5.9	0.8
Cement	140.2	1.9%	91,640	2.7%	13.8	15.9	2.1
Ceramics	87.6	1.2%	20,315	0.6%	n/a	358.4	1.3
Engineering	418.9	5.8%	285,711	8.3%	32.5	11.2	0.8
Financial Institutions	310.6	4.3%	103,524	3.0%	11.8	20.9	n/a
Food & Allied	230.1	3.2%	226,133	6.6%	35.9	19.0	3.5
Fuel & Power	132.8	1.8%	287,861	8.3%	10.1	6.5	0.6
General Insurance	1,243.7	17.1%	129,443	3.8%	22.2	16.2	1.8
IT	122.7	1.7%	31,438	0.9%	30.7	27.2	1.8
Jute	85.1	1.2%	2,970	0.1%	24.3	36.5	1.9
Life Insurance	109.5	1.5%	47,626	1.4%	37.6	n/a	n/a
Miscellaneous	266.2	3.7%	132,761	3.8%	54.9	12.9	1.0
Mutual Fund	834.1	11.5%	33,967	1.0%	7.6	16.5	0.7
Paper & Printing	66.2	0.9%	21,287	0.6%	33.1	39.5	1.4
Pharma. & Chemicals	1,069.2	14.7%	582,285	16.9%	22.3	10.4	1.5
Services & Real Estate	193.8	2.7%	27,293	0.8%	19.9	16.8	1.1
Tannery	55.8	0.8%	24,094	0.7%	49.8	20.7	1.5
Telecommunication	39.0	0.5%	513,105	14.9%	11.4	12.7	3.5
Textile	1,393.7	19.2%	144,323	4.2%	24.0	23.5	1.0
Travel & Leisure	59.8	0.8%	35,471	1.0%	53.6	24.1	0.3
Equity Market	7,263.8	100.0%	3,451,121	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	0.3%	1.0	LHB	-3.7%	(3.3)
ORIONINFU	6.4%	0.8	PUBALIBANK	-1.3%	(2.0)
PTL	3.5%	0.7	ISLAMIBANK	-1.1%	(1.9)
RELIANCINS	3.3%	0.5	UCB	-2.3%	(1.6)
BESTHLDNG	2.0%	0.4	BXPHERMA	-0.9%	(1.6)
ROBI	0.7%	0.4	WALTONHIL	-1.0%	(1.6)
PREMIERBAN	1.8%	0.4	BANKASIA	-2.4%	(1.1)
CITYGENINS	1.5%	0.3	GPHISPAT	-4.7%	(1.1)
UTTARABANK	0.5%	0.3	UNIQUEHRL	-4.1%	(1.0)
SIPLC	3.4%	0.3	CITYBANK	-0.7%	(1.0)

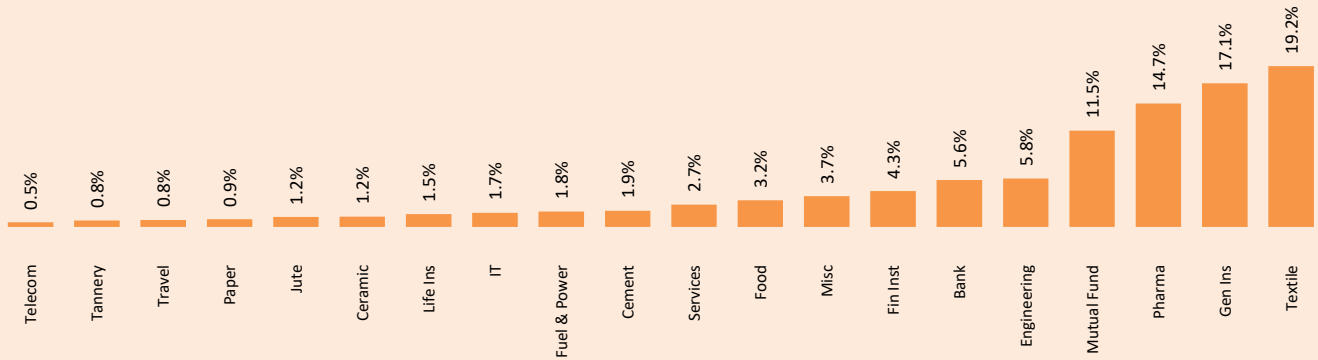
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

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

DAILY MARKET REVIEW

Sunday, September 27, 2026

TURNOVER DISTRIBUTION



TOP GAINERS**

PRIME1ICBA	9.86%
CAPMIBBLMF	9.66%
ICBAGRANI1	7.23%
SAMORITA	7.02%
LRGLOBMF1	6.67%
EBL1STMF	6.67%
ORIONINFU	6.39%
ICB3RDNRB	6.25%
VAMLRBBF	6.10%
KPPL	5.22%
IFILISLMF1	4.92%
MERCINS	4.87%
SONARGAON	4.76%
DULAMACOT	4.63%
NCCBLMF1	4.48%
ICBEPMF1S1	4.48%
SONALIANS	4.06%
GREENDELMF	3.92%
SUNLIFEINS	3.65%
PTL	3.54%

TOP LOSERS**

SHYAMPSUG	-7.22%
MEGCONMILK	-6.10%
CNATEX	-6.06%
SHARPIND	-5.76%
PREMIERCEM	-5.65%
FARCHEM	-5.39%
ZEALBANGLA	-5.35%
PREMIERLEA	-5.00%
TOSRIFA	-4.93%
BBS	-4.84%
GPHISPAT	-4.71%
SEAPEARL	-4.50%
DACCADYE	-4.46%
RSRMSTEEL	-4.35%
ORIONPHARM	-4.30%
DOMINAGE	-4.26%
FAREASTLIF	-4.26%
AL-HAJTEX	-4.18%
BEXIMCO	-4.13%
UNIQUEHRL	-4.13%

TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
IPDC	253.9	3.5%	35.1
SIPLC	221.5	3.0%	153.9
ASIATICLAB	208.6	2.9%	108.1
ORIONINFU	205.6	2.8%	279.7
BNICL	199.6	2.7%	168.7
ENVOYTEX	193.9	2.7%	72.9
PTL	170.9	2.4%	78.9
SHARPIND	166.8	2.3%	18.0
MALEKSPIN	159.3	2.2%	48.6
ORIONPHARM	140.6	1.9%	28.9
BXPHERMA	140.3	1.9%	147.1
RELIANCINS	134.6	1.9%	110.9
ANWARGALV	124.4	1.7%	121.1
1STPRIMFMF	122.4	1.7%	36.6
MERCINS	114.3	1.6%	53.8
SAMORITA	114.2	1.6%	97.6
SAIHAMTEX	112.8	1.6%	35.7
PRIMEBANK	101.6	1.4%	28.1
APEXSPINN	99.8	1.4%	355.0
SONALIANS	84.6	1.2%	223.1

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	327,313	9.4%	242.4
SQURPHARMA	192,714	5.6%	217.4
ROBI	158,186	4.6%	30.2
BRACBANK	147,448	4.3%	64.4
WALTONHIL	124,698	3.6%	340.2
BATBC	121,662	3.5%	225.3
MARICO	83,787	2.4%	2,659.9
BERGERPBL	71,366	2.1%	1,453.3
UPGDCL	66,259	1.9%	114.3
BXPHERMA	65,623	1.9%	147.1
LHB	60,391	1.7%	52.0
PUBALIBANK	57,920	1.7%	38.7
CITYBANK	51,782	1.5%	29.6
RENATA	51,476	1.5%	448.8
DUTCHBANGL	43,985	1.3%	45.5
ISLAMIBANK	42,826	1.2%	26.6
UNILEVERCL	38,389	1.1%	1,991.7
EBL	37,640	1.1%	22.9
PRIMEBANK	35,955	1.0%	28.1
POWERGRID	34,451	1.0%	37.7

DAILY MARKET REVIEW

Sunday, September 27, 2026

UPCOMING DIVIDENDS							
Ticker	Period	Cash Div	Bonus Div	EPS (BDT)	NAVPS (BDT)	Record Date	AGM Date

TOP BLOCK TRANSACTIONS (DSE)				UPCOMING BOARD MEETING DATE		
Ticker	Volume ('000)	Value (mn)	Price Range	Ticker	Period	Meeting Date
PRIMEBANK	3,008.9	84.9	28.2 - 28.2	BANGAS	FY'26	28-Sep-26
SIPLC	375.0	53.4	136 - 150	IBNSINA	FY'26	30-Sep-26
BXPHARMA	325.5	48.3	148 - 150	APEXSPINN	FY'26	4-Oct-26
BATBC	179.3	40.3	225 - 225	APEXFOODS	FY'26	4-Oct-26
PTL	513.8	37.0	71 - 77			
RELIANCINS	200.0	23.0	115 - 115			
BNICL	63.0	11.5	178 - 183.9			
CAPMIBBLMF	673.0	9.9	14.6 - 15.1			
APEXSPINN	26.3	9.2	343 - 351			
CITYGENINS	51.0	6.3	124.4 - 124.4			
CITYBANK	179.0	4.9	26.9 - 30.5			
IPDC	131.0	4.2	32 - 32			
MERCINS	80.5	4.0	50 - 50			
PREMIERCEM	80.1	3.5	44 - 44.6			
IFILISLMF1	391.0	2.4	6.2 - 6.2			
EBL	109.0	2.4	21.6 - 21.6			
IBNSINA	7.7	2.3	291 - 291			
CAPITECGBF	220.0	1.8	8.3 - 8.3			
TRUSTBANK	140.7	1.7	12.3 - 12.3			
DULAMIACOT	8.1	1.4	177 - 177			
CONFIDCEM	15.0	1.0	63.6 - 63.6			
CVOPRL	6.0	0.9	152 - 152			
DGIC	20.0	0.8	39.4 - 39.4			
PRAGATIINS	10.0	0.8	78 - 78			
MALEKSPIN	15.0	0.8	50 - 50			
DAFODILCOM	4.6	0.7	164 - 164			
PRAGATILIF	4.5	0.7	162.8 - 162.8			
SHARPIND	33.0	0.6	19.2 - 19.2			
LRBDL	36.0	0.5	14.6 - 14.6			

SELECTED NEWS IN BRIEF

GOVT MOVES TO CURB ARBITRARY PRICE HIKES OF ESSENTIALS AMID FUEL SHOCK:
The government has moved to strengthen market monitoring and curb arbitrary price hikes of essential food items amid renewed inflationary concerns following a sharp increase in fuel prices. The Ministry of Commerce has sought a review of the prices of cattle feed, soybean meal, maize, wheat, wheat bran, grain-based feed and liquid milk, with particular attention to the impact of the latest fuel price increase on the market. The move comes after the government raised the retail prices of all major petroleum products by Tk 20 per litre from September 21.
Source: <https://thefinancialexpress.com.bd/trade/govt-moves-to-curb-arbitrary-price-hikes-of-essentials-amid-fuel-shock>

TOP BLOCK TRANSACTIONS (CSE)			
Ticker	Volume ('000)	Value (mn)	Price Range
PTL	925.3	67.4	72 - 76.8
CITYGENINS	200.0	26.0	130.1 - 130.1
SOUTHEASTB	2,000.0	21.2	10.6 - 10.6
DUTCHBANGL	155.4	6.5	42 - 42
BRACBANK	70.7	4.3	60 - 60.5
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GENERAL DISCLOSURE

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