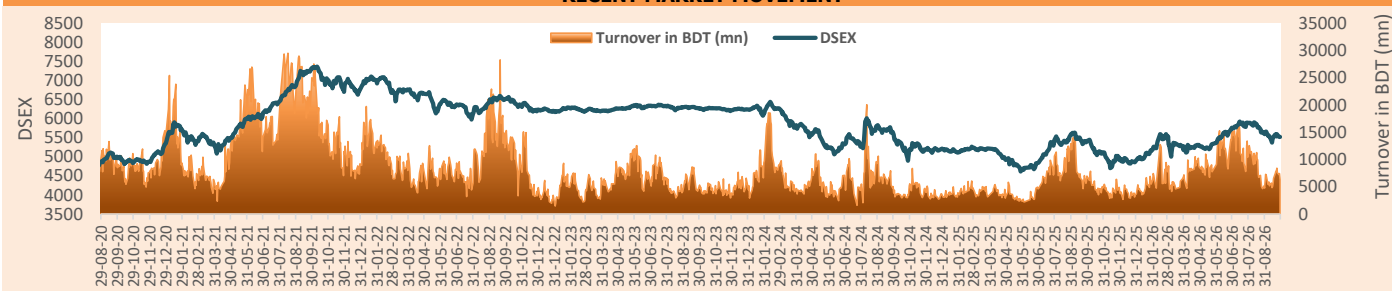


RECENT MARKET MOVEMENT



DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	5,524	5,526	▼ (1.5)	0.0%	-1.6%	13.5%	2.5%
DS30	2,095	2,098	▼ (3.3)	-0.2%	-1.3%	13.0%	0.5%
DSMEX (SME)	1,016	1,038	▼ (21.7)	-2.1%	-4.6%	18.7%	5.3%
Market Cap (BDT bn)	6,852	6,875	▼ (23.5)	-0.3%	-1.5%	1.0%	-5.3%
Turnover (BDT mn)	6,345	7,465	▼ (1,119.4)	-15.0%	22.5%	79.2%	5.9%
Total Trade	172,615	195,699	▼ (23,084.0)	-11.8%	5.7%	50.4%	4.6%
Volume (mn)	208	235	▼ (26.4)	-11.2%	9.8%	78.1%	22.1%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	9,054	9,058	▼ (3.9)	0.0%	-1.6%	7.9%	-2.1%
CASPI	14,773	14,778	▼ (5.0)	0.0%	-2.1%	8.5%	-1.7%
Market Cap (BDT bn)	9,519	9,524	▼ (4.8)	0.0%	0.0%	39.0%	32.3%
Turnover (BDT mn)	253	107	▲ 145.7	135.7%	129.7%	377.6%	98.8%
Total Trade	1,200	1,412	▼ (212.0)	-15.0%	-12.5%	33.5%	-27.0%
Volume ('000)	6,384	4,428	▲ 1,956.6	44.2%	147.5%	541.6%	207.2%

TODAY'S MARKET COMMENTARY

The benchmark index slipped to negative trajectory as the market pulse reverted in the final hour after remaining somewhat afloat throughout the session, since investor caution prevailed amid apprehensions of weaker corporate earnings for the June-closing companies weighing down investors' sentiment. DSEX, the broad index of the Dhaka Stock Exchange, edged down by 1.5 points to settle at 5,524, compared with 5,526 in the previous trading session. The market opened on a positive note and remained afloat through most of the session before succumbing to late-hour selling pressure despite a brief bout of buying interest. Meanwhile, market turnover also declined 15.0% to BDT 6.3 billion from BDT 7.5 billion in the previous session. On the sectoral front, Textile (28.8%) accounted for the highest share of turnover, followed by General Insurance (18.2%) and Pharma (10.6%). Sectors mostly posted mixed returns, where Textile (1.3%), Travel (1.3%) and Cement (0.7%) exhibited the highest return where Paper (-1.6%), IT (-0.9%) and Mutual Fund (-0.9%) exhibited the highest corrections on the bourse today. Of the 395 issues traded, 140 advanced, 168 declined and 87 remained unchanged.

The port city bourse, CSE, also ended in negative terrain. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) declined 3.9 points and 5.0 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;

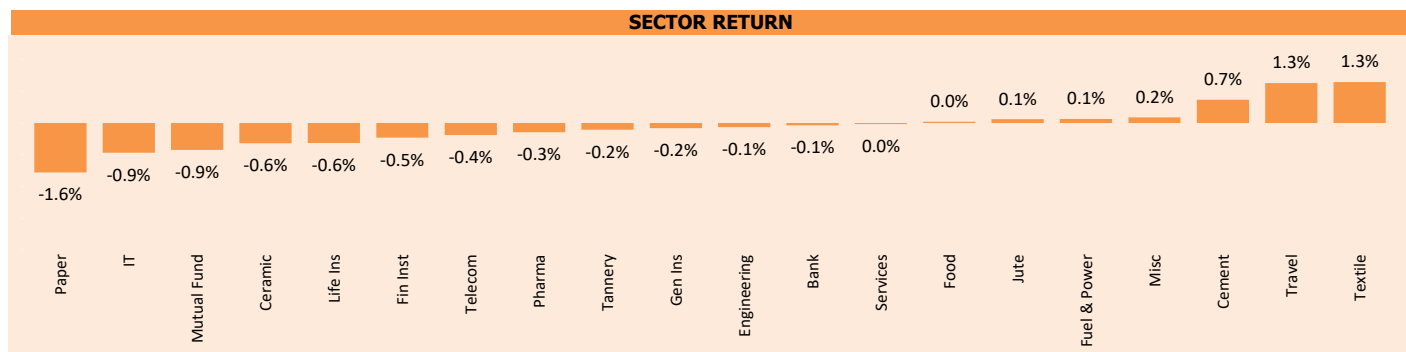
> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

DAILY MARKET REVIEW

Tuesday, September 29, 2026

MARKET VALUATION			SCRIP WISE PERFORMANCE			
	Today	Yday	Advanced	Declined	Unchanged	
Market P/NAVPS	1.22	1.22				
Market Fw. P/E ₁	10.05	10.06	↑ 140	↓ 168	— 87	

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	346.9	6.0%	708,873	20.6%	4.6	5.9	0.8
Cement	79.2	1.4%	91,836	2.7%	14.4	15.9	2.1
Ceramics	55.4	1.0%	20,051	0.6%	n/a	353.7	1.3
Engineering	319.5	5.6%	282,856	8.2%	32.1	11.1	0.8
Financial Institutions	253.6	4.4%	102,089	3.0%	11.6	20.6	n/a
Food & Allied	138.8	2.4%	225,617	6.6%	35.8	19.0	3.5
Fuel & Power	106.7	1.9%	287,904	8.4%	10.3	6.5	0.6
General Insurance	1,045.4	18.2%	130,690	3.8%	22.4	16.4	1.8
IT	81.3	1.4%	30,989	0.9%	30.4	26.8	1.8
Jute	37.0	0.6%	2,967	0.1%	24.1	36.5	1.9
Life Insurance	170.2	3.0%	48,157	1.4%	38.2	n/a	n/a
Miscellaneous	169.4	2.9%	132,592	3.9%	51.7	12.9	1.0
Mutual Fund	458.4	8.0%	32,820	1.0%	7.3	16.0	0.7
Paper & Printing	36.8	0.6%	20,613	0.6%	32.4	38.3	1.4
Pharma. & Chemicals	608.1	10.6%	580,667	16.9%	22.1	10.4	1.5
Services & Real Estate	60.5	1.1%	27,152	0.8%	19.7	16.7	1.1
Tannery	41.8	0.7%	23,796	0.7%	49.6	20.4	1.5
Telecommunication	32.8	0.6%	510,593	14.8%	11.4	12.7	3.5
Textile	1,658.1	28.8%	145,868	4.2%	24.1	23.5	1.0
Travel & Leisure	51.2	0.9%	35,666	1.0%	52.9	24.3	0.3
Equity Market	5,751.1	100.0%	3,441,797	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.
UNIQUEHRL	3.6%	0.8	BXPHARMA	-0.6%	(1.1)
UCB	1.1%	0.8	NBL	-3.0%	(1.0)
MATINSPINN	4.6%	0.8	DAFODILCOM	-3.5%	(0.7)
SHARPIND	5.1%	0.7	ORIONINFU	-4.6%	(0.6)
PREMIERCEM	6.2%	0.7	SQURPHARMA	-0.1%	(0.6)
SIPLC	6.1%	0.6	BANKASIA	-1.2%	(0.5)
SAIHAMCOT	7.6%	0.6	CITYBANK	-0.3%	(0.5)
SAIHAMTEX	5.7%	0.5	RELIANCINS	-3.1%	(0.5)
IFIC	2.1%	0.5	EBL	-0.4%	(0.5)
LHB	0.6%	0.5	ROBI	-0.7%	(0.4)

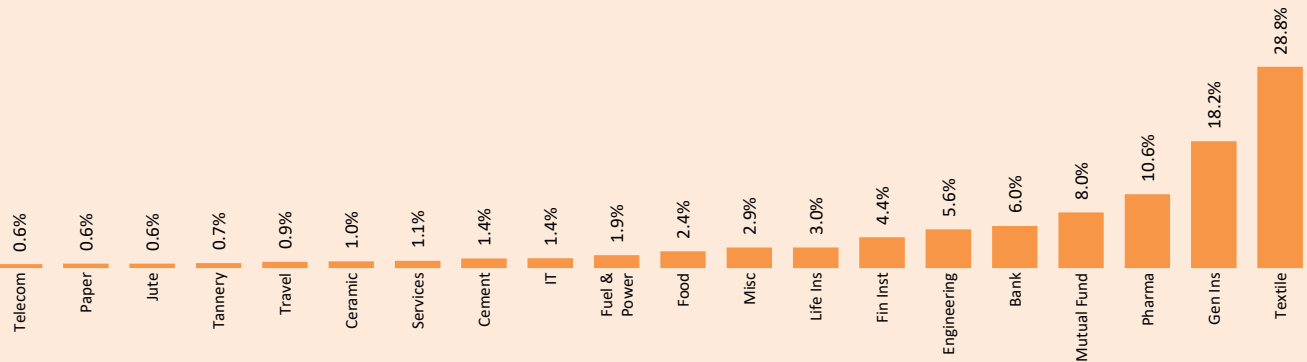
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

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

DAILY MARKET REVIEW

Tuesday, September 29, 2026

TURNOVER DISTRIBUTION



TOP GAINERS**

MIDASFIN	8.70%
SAIHAMCOT	7.62%
PREMIERCEM	6.17%
SIPLC	6.09%
DULAMIAFOT	5.88%
BDTHAIFOOD	5.82%
SAIHAMTEX	5.74%
SHARPIND	5.06%
ARAMITCEM	4.63%
MATINSPINN	4.60%
NAHEEACP	4.49%
PRIMEFIN	3.70%
UNIQUEHRL	3.61%
GENNEXT	3.57%
ICICL	3.51%
AZIZPIPES	3.36%
INTRACO	3.30%
MEGHNAFET	3.13%
PHOENIXFIN	3.13%
MONNOCERA	2.89%

TOP LOSERS**

HFL	-6.72%
PLFSL	-5.88%
PREMIERLEA	-5.00%
VAMLRBBF	-4.65%
ORIONINFU	-4.58%
TALLUSPIN	-4.35%
APOLOISPAT	-3.57%
APOLOISPAT	-3.57%
DAFODILCOM	-3.54%
KBPPWBIL	-3.51%
ICBAGRANI1	-3.49%
IFILISLMF1	-3.23%
SALAMCRST	-3.20%
RELIANCINS	-3.14%
CRYSTALINS	-3.09%
ICB3RDNRB	-3.08%
NBL	-3.03%
BIFC	-2.94%
1JANATAMF	-2.70%
PHPMF1	-2.70%

TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
SAIHAMTEX	337.1	5.9%	40.5
IPDC	216.8	3.8%	35.6
SAIHAMCOT	185.0	3.2%	24.0
PTL	155.3	2.7%	80.8
ORIONINFU	149.3	2.6%	268.7
SHARPIND	141.6	2.5%	18.7
APEXSPINN	141.3	2.5%	374.8
RELIANCINS	135.2	2.4%	107.8
BRACBANK	133.8	2.3%	64.6
MALEKSPIN	124.0	2.2%	48.0
BNICL	102.1	1.8%	172.1
BXPBARMA	98.6	1.7%	147.2
MBL1STMF	96.2	1.7%	11.0
ASIATICLAB	82.9	1.4%	105.4
ENVOYTEX	82.9	1.4%	71.9
ETL	80.8	1.4%	15.4
ACMEPL	79.6	1.4%	25.0
ANWARGALV	69.3	1.2%	114.8
FEKDIL	68.9	1.2%	22.3
1STPRIMFMF	64.9	1.1%	33.4

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	326,503	9.4%	241.8
SQURPHARMA	192,714	5.6%	217.4
ROBI	156,614	4.5%	29.9
BRACBANK	147,906	4.3%	64.6
WALTONHIL	123,708	3.6%	337.5
BATBC	121,500	3.5%	225.0
MARICO	83,944	2.4%	2,664.9
BERGERPBL	72,024	2.1%	1,466.7
UPGDCL	65,911	1.9%	113.7
BXPBARMA	65,668	1.9%	147.2
LHB	60,391	1.7%	52.0
PUBALIBANK	57,022	1.7%	38.1
CITYBANK	52,307	1.5%	29.9
RENATA	51,327	1.5%	447.5
DUTCHBANGL	43,888	1.3%	45.4
ISLAMIBANK	42,987	1.2%	26.7
UNILEVERCL	38,088	1.1%	1,976.1
EBL	37,312	1.1%	22.7
PRIMEBANK	35,827	1.0%	28.0
POWERGRID	34,633	1.0%	37.9

DAILY MARKET REVIEW

Tuesday, September 29, 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
BRACBANK	1,500.0	96.9	64.6 - 64.6	IBNSINA	FY'26	30-Sep-26
DHAKABANK	7,574.9	85.6	11.3 - 11.3	APEXSPINN	FY'26	4-Oct-26
JAMUNABANK	2,180.0	49.9	22.9 - 22.9	APEXFOODS	FY'26	4-Oct-26
IPDC	1,198.0	46.6	38.9 - 38.9			
GREENDELT	700.0	46.3	66.1 - 66.1			
BATBC	179.3	40.5	225.6 - 225.7			
SAIHAMTEX	974.5	37.4	37 - 39.5			
CITYGENINS	276.8	34.4	120 - 130.6			
DGIC	629.6	25.3	40 - 44.5			
PREMIERBAN	4,200.0	21.4	5.1 - 5.1			
MARICO	5.0	13.2	2620 - 2640			
SQURPHARMA	50.0	10.9	217.6 - 217.6			
SIPLC	69.5	10.8	140 - 158			
ASIAINS	190.0	8.7	45.7 - 45.7			
BNICL	47.0	7.3	155 - 155			
APEXSPINN	18.9	7.0	368 - 369			
TAKAFULINS	120.0	6.4	53.2 - 53.2			
PTL	83.0	6.3	75 - 78.9			
CITYBANK	150.0	5.0	33 - 33			
ASIATICLAB	28.3	3.1	111 - 111			
SONALILIFE	32.5	2.7	84.5 - 84.5			
DUTCHBANGL	42.5	2.0	47 - 47			
ETL	134.1	2.0	14.6 - 14.7			
BDAUTOCA	10.0	1.9	187 - 187			
DOMINAGE	22.5	1.4	63.6 - 65			
FEKDIL	55.0	1.2	22.7 - 22.7			
RELIANCINS	10.3	1.1	106 - 106			
BDTHAIFOOD	50.0	1.0	20.6 - 20.6			
ONEBANKPLC	133.4	1.0	7.5 - 7.5			

SELECTED NEWS IN BRIEF

EXPORT DIVERSIFICATION STRATEGY FOR 18 KEY MARKETS BEING PREPARED:
COMMERCE SECY: The government is formulating separate export strategies for 18 key markets, including India, China, Russia, Iran and the US, focusing on market potential, existing barriers, competitors and measures needed to expand Bangladesh's exports. The strategies will identify potential products for each market, assess Bangladesh's current position and major competitors, and outline policy and institutional measures to increase exports. The remaining markets include Malaysia, Singapore, the UAE, Switzerland, South Korea, Brazil, Turkey, the UK, France, Japan, Canada, Belgium, Australia, New Zealand and Fiji.
Source: <https://www.tbsnews.net/economy/export-diversification-strategy-18-key-markets-being-prepared-commerce-secy-1556831>

TOP BLOCK TRANSACTIONS (CSE)			
Ticker	Volume ('000)	Value (mn)	Price Range
PTL	1,042.7	78.9	72 - 80.9
SOUTHEASTB	1,332.7	14.0	10.5 - 10.5
CITYGENINS	79.0	10.4	131 - 131.3
BRACBANK	104.0	6.3	60 - 60.4
DUTCHBANGL	100.1	4.2	42.2 - 42.5
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

GENERAL DISCLOSURE

Disclaimer: This document has been prepared by EBL Securities PLC. (EBLSL) for information only of its clients on the basis of the publicly available information in the market and own research. This document has been prepared for information purpose only and does not solicit any action based on the material contained herein and should not be construed as an offer or solicitation to buy or sell or subscribe to any security. Neither EBLSL nor any of its directors, shareholders, member of the management or employee represents or warrants expressly or impliedly that the information or data of the sources used in the documents are genuine, accurate, complete, authentic and correct. However all reasonable care has been taken to ensure the accuracy of the contents of this document. EBLSL will not take any responsibility for any decisions made by investors based on the information herein.