

BASL Daily Market Commentary

Wednesday, October 14, 2026

Hadi mansion (2nd floor) 2, Dilkusha Commercial Area, Dhaka-1000

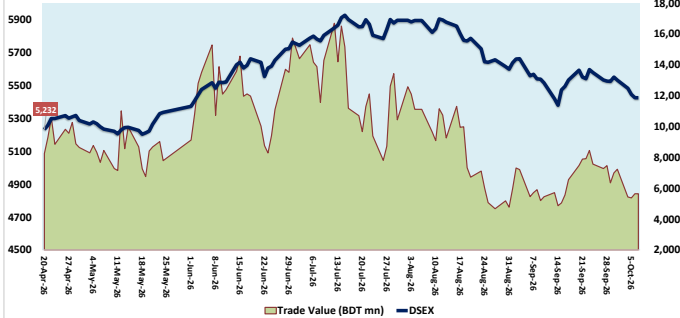
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Today's Market Snippet

The DSE broad Index DSEX has closed green today. The benchmark index has increased by 20.5 points or 0.4% and closed at 5429.4 points today. The blue-chip index DS30 has closed in green by 3.2 or 0.2% to 2092.6 points and the shariah based index DSES also increased by 2.3 points or 0.2% to 1072.4 points respectively. Turnover has stood at BDT million 4,162(USD 33.74 million), about 0.01% higher than that of the previous trading session's value. General Insurance (2.1%), life Insurance (1.0%) and Engineering (1.0%) were in the top-gaining sectors where as Jute (-4.9%) , Paper & Printing (-1.0%) and Service & Real Estate (-1.0%) were in the top losing sectors today . Textiles (24.0%) ,General Insurance (13.5%) and Pharmaceuticals (8.8 %) were the top three leading sectors based on turnover position. ETL , SONALIANSH and 1STPRIMEMF were top three active stocks in the market. USMANIAGL , 1STPRIMFMF and TECHNODRUG top three gainers while NURANI, SHARPIND and SONALIANSH are the top three losers today.

Last Six Month DSEX Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5429.4	5408.9	20.5	0.4%	3.7%
DSES	1072.4	1070.1	2.3	0.2%	-8.4%
DS30	2092.6	2089.4	3.2	0.2%	7.7%

YTD= Year to the date

Advanced		Declined		Unchanged	
197		137		51	
Market Indicators	Today	Last day		Today	Last day
Market PE	9.18	9.16	Market RSI (14)	39.21	35.99
Market Statistics		Today	Last day	Change	Change (%)
Market Cap	Mn BDT	6,846,360	6,835,965	10,395	0.15%
	Mn USD	55,504	55,419	84	
Turnover	Mn BDT	4,162	4,161	0	0.01%
	Mn USD	33.74	33.7	0.0	
Volume	Mn Shares	154	156.6	(2.6)	-2%
Turnover Composition		Top 20 Cos.	Top 15 Cos.	Top 10 Cos.	Top 5 Cos.
	Mn BDT	1,316	1,010	637	155
	%	31.6%	24.3%	15.3%	3.7%

Sector Review

Sector Index	No. of Company	Turnover (mn)	(%) of Total Turnover	Turnover Δ (%)	M.Cap (mn)	(%) of Total M.Cap	M.Cap Δ (%)	P/E (x)
Banks	33	317.2	8.2%	-14.6%	564,002	19.1%	0.2%	5.5
Cement	7	26.7	0.7%	22.9%	89,546	3.0%	0.4%	15.5
Ceramics	5	30.8	0.8%	-4.4%	4,419	0.1%	0.2%	78.0
Engineering	42	323.8	8.4%	-0.2%	213,460	7.2%	1.0%	9.1
Food & Allied	21	159.2	4.1%	32.9%	206,743	7.0%	0.0%	17.3
Fuel & Power	23	192.5	5.0%	0.0%	257,914	8.7%	-0.4%	5.9
General Insurance	42	522.3	13.5%	14.7%	118,599	4.0%	2.1%	15.0
IT	11	60.8	1.6%	13.1%	26,354	0.9%	0.4%	24.1
Jute	3	132.4	3.4%	14.6%	2,652	0.1%	-4.9%	32.6
Life Insurance	12	98.2	2.5%	3.3%	45,506	1.5%	1.0%	n/m
Miscellaneous	15	159.3	4.1%	-17.3%	101,044	3.4%	-0.1%	10.1
Mutual Funds	36	330.2	8.5%	56.7%	15,671	0.5%	-0.2%	7.6
NBFIs	23	64.8	1.7%	-55.3%	55,684	1.9%	-0.1%	11.0
Paper & Printing	6	44.8	1.2%	-9.6%	14,445	0.5%	-1.0%	27.9
Pharmaceuticals	32	340.3	8.8%	0.3%	540,742	18.3%	0.6%	9.7
Services & Real Estate	4	36.1	0.9%	10.6%	24,633	0.8%	-1.0%	17.3
Tannery	6	49.7	1.3%	-7.0%	20,340	0.7%	0.3%	17.9
Telecommunication	3	20.8	0.5%	-57.4%	505,629	17.1%	0.0%	12.2
Textiles	58	928.0	24.0%	3.8%	116,325	3.9%	-0.4%	18.8
Travel & Leisure	4	25.6	0.7%	3.1%	28,440	1.0%	-0.3%	18.6

Sector Market Cap. (%)

Banks	19.1%
Pharmaceuticals	18.3%
Telecommunication	17.1%
Fuel & Power	8.7%
Engineering	7.2%
Food & Allied	7.0%
General Insurance	4.0%
Textiles	3.9%
Miscellaneous	3.4%
Cement	3.0%
NBFIs	1.9%
Life Insurance	1.5%
Travel & Leisure	1.0%
IT	0.9%
Services & Real Estate	0.8%
Tannery	0.7%
Mutual Funds	0.5%
Paper & Printing	0.5%
Ceramics	0.1%
Jute	0.1%

Sector Return (%)

General Insurance	2.1%
Life Insurance	1.0%
Engineering	1.0%
Pharmaceuticals	0.6%
IT	0.4%
Cement	0.4%
Tannery	0.3%
Banks	0.2%
Ceramics	0.2%
Telecommunication	0.0%
Food & Allied	0.0%
NBFIs	-0.1%
Miscellaneous	-0.1%
Mutual Funds	-0.2%
Travel & Leisure	-0.3%
Textiles	-0.4%
Fuel & Power	-0.4%
Services & Real Estate	-1.0%
Paper & Printing	-1.0%
Jute	-4.9%

Turnover Contribution (%)

Textiles	24.0%
General Insurance	13.5%
Pharmaceuticals	8.8%
Mutual Funds	8.5%
Engineering	8.4%
Banks	8.2%
Fuel & Power	5.0%
Miscellaneous	4.1%
Food & Allied	4.1%
Jute	3.4%
Life Insurance	2.5%
NBFIs	1.7%
IT	1.6%
Tannery	1.3%
Paper & Printing	1.2%
Services & Real Estate	0.9%
Ceramics	0.8%
Cement	0.7%
Travel & Leisure	0.7%
Telecommunication	0.5%

Most Active Stocks					Top Gainers				Top Losers			
Scripts	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)	Scripts	Price	Change (%)	Forward PE	Scripts	Price	Change (%)	Forward PE
ETL	13.9	-2.1%	155.0	4.0%	USMANIAGL	54.8	9.8%	n/a	NURANI	2.6	-7.1%	n/a
SONALIANSH	244.5	-4.9%	132.3	3.4%	1STPRIMFMF	29.1	9.8%	12.02	SHARPIND	13.4	-5.0%	n/a
1STPRIMFMF	29.1	9.8%	95.6	2.5%	TECHNODRUG	34.3	9.6%	21.8	SONALIANSH	244.5	-4.9%	32.63
PTL	75.9	0.1%	86.5	2.2%	BIFC	3.6	9.1%	n/a	EBL1STMF	4.1	-4.7%	n/a
APEXSPINN	406.8	6.1%	84.6	2.2%	RENWICKJA	889.1	7.5%	-	FIRSTFIN	4.2	-4.5%	n/a
BRACBANK	66	-0.2%	83.0	2.1%	ATLASBANG	82.7	7.3%	n/a	STANDBANKL	4.3	-4.4%	71.67
SHARPIND	13.4	-5.0%	80.7	2.1%	RAHIMAFOOD	69.9	7.2%	n/a	FAMILYTEX	2.2	-4.3%	n/a
SAIHAMTEX	45.2	-2.2%	80.0	2.1%	PROVATIINS	51.1	7.1%	22.81	NFML	12.5	-3.8%	n/a
APEXFOODS	325.4	5.0%	71.7	1.9%	BDTHAIFOOD	16.5	6.5%	n/a	CNATEX	2.6	-3.7%	8.48
MLDYEING	10.9	1.9%	71.5	1.9%	APEXSPINN	406.8	6.1%	120.36	ICBIBANK	2.6	-3.7%	n/a



Lowest PE Instruments				
Scripts	PE	Price	Change	Turnover As (%)
MALEKSPIN	8.35	45.0	-1.1%	0.3%
SHAHJABANK	2.87	17.4	-0.6%	0.6%
PADMAOIL	3.14	193.8	-0.4%	0.6%
SOUTHEASTB	3.30	11.5	0.9%	0.5%
NCCBANK	3.51	14.6	0.7%	0.5%
BEACHHATCH	3.51	22.6	0.4%	0.0%
MPETROLEUM	3.70	205.2	0.2%	0.7%
PRIMEBANK	3.71	28.2	0.0%	1.0%
EBL	3.96	22.9	0.4%	1.0%
POWERGRID	4.29	37.8	-2.3%	1.1%
PUBALIBANK	4.54	40.4	-0.5%	1.4%
ONEBANKPLC	4.60	7.2	1.4%	0.2%
UTTARABANK	4.62	20.9	1.5%	0.5%
BANKASIA	4.69	16.7	-0.6%	0.6%
UTTARAFIN	4.72	10.6	1.0%	0.0%

Highest PE Instruments				
Scripts	PE	Price	Change	Turnover As (%)
NAVANACNG	1410.00	18.8	0.5%	0.0%
MONNOAGML	1320.88	299.4	-0.4%	0.0%
MONNOFABR	1237.50	16.5	0.6%	0.1%
LEGACYFOOT	1226.25	65.4	0.8%	0.1%
FUWANGCER	825.00	11.0	0.9%	0.0%
DULAMIACOT	746.63	199.1	-3.2%	0.0%
ALLTEX	670.00	26.8	-1.1%	0.0%
HAMI	508.57	142.4	-1.5%	0.0%
IBP	480.00	12.8	0.8%	0.0%
BANGAS	473.33	113.6	-0.4%	0.0%
DAFODILCOM	457.20	152.4	1.9%	0.2%
DSHGARME	381.43	142.4	-0.5%	0.0%
VFSTDL	280.00	11.2	-2.6%	0.0%
AMBEEPCHA	245.48	739.7	0.7%	0.1%
RAKCERAMIC	245.00	24.5	1.2%	0.3%

Trade Composition of Client Group			
Client Type	Buy %	Sale %	% of Total
Retail	91.75%	91.53%	91.64%
BDT mn	3,818	3,809	3,814
Institution	4.56%	3.84%	4.20%
BDT mn	190	160	175
Foreign	1.25%	2.22%	1.73%
BDT mn	52	92	72
Dealer	1.20%	0.77%	0.99%
BDT mn	50	32	41
Others	1.24%	1.64%	1.44%
BDT mn	52	68	60

Instrument Categorywise Trade Figures		
Type	No of Trade	Traded Value
A	93,913	2,578.92
B	40,438	1,082.34
Z	14,158	209.83

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Script	Declaration	Record Date	AGM Date
APEXFOOT	15%C, 15%B	15.10.2026	29.11.2026
ENVOYTEX	32.50%C	26.10.2026	05.12.2026
BANGAS	3% C	19.10.2026	12.11.2026
TALLUSPIN	0%	19.10.2026	12.11.2026
IBNSINA	77%C	26.10.2026	23.11.2026
APEXSPINN	20%C	27.10.2026	26.11.2026
APEXFOODS	20%C	27.10.2026	26.11.2026
EHL	20% C	29.10.2026	22.12.2026
FINEFOODS	40.5% C	12.11.2026	26.12.2026

Performances of World Stock Indices				
Indices	Country	Index Value	Change	Change (%)
DJIA	USA	51,180	-341	-0.7%
FTSE 100	UK	10,410	-48	-0.5%
SENSEX	India	71,590	-1,048	-1.4%
Nikkei 225	Japan	69,244	-792	-1.1%
S&P 500	USA	7,802	-17	-0.2%
NYSE Comp.	USA	27,539	-61	-0.2%
Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
123.4	138.2	138.2	2.7	0.8

Market Leaders Composition				
Script	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	238.9	0.3%	322,587	9.9%
SQURPHARMA	219.6	1.1%	194,665	6.0%
ROBI	29.7	-0.3%	155,567	4.8%
BATBC	218.1	-0.5%	117,774	3.6%
BRACBANK	66	-0.2%	116,801	3.6%
WALTONHIL	330	0.3%	99,966	3.1%
MARICO	2645.2	0.0%	83,324	2.6%
BERGERPBL	1451.3	0.1%	67,308	2.1%
UPGDCL	113.7	-0.2%	65,911	2.0%
BXPCHARMA	144.9	0.3%	64,642	2.0%

Today's News Cut			
DBH: Q3 Financials EPS was Tk. 1.24 for July-September 2026 as against Tk. 1.60 for July-September 2025; EPS was Tk. 3.98 for January-September 2026 as against Tk. 3.67 for January-September 2025. NOCFPS was Tk. (4.51) for January-September 2026 as against Tk. 17.36 for January-September 2025. NAV per share was Tk. 52.03 as on September 30, 2026 and Tk. 49.55 as on December 31, 2025. Reasons for deviation: Profit for the period increased significantly, primarily driven by the reversal of investment impairment provisions of approximately BDT 5.5 crore following the recovery of the share market in 2026. The decrease in provisioning requirements against loans and advances compared to the corresponding period of the previous year also contributed to the improved profitability. Consequently, Earnings Per Share (EPS) rose significantly to BDT 3.98. Net operating Cash Flow per share decreased during the period, primarily due to a reduction in the deposit portfolio. Despite this decline, the company maintained a strong liquidity position and effective funding management.			
CBAMCL2ND: Daily NAV On the close of operation on 13-Oct-2026, the Fund has reported Net Asset Value (NAV) of Tk. 9.06 per unit on the basis of current market price and Tk. 13.02 per unit on the basis of cost price against face value of Tk. 10.00 whereas total Net Assets of the Fund stood at Tk. 452,890,708.51 on the basis of current market price and Tk. 650,790,599.37 on the basis of cost price after considering all assets and liabilities of the Fund.			
PF1STMF: Daily NAV On the close of operation on 13-Oct-2026, the Fund has reported Net Asset Value (NAV) of Tk. 8.39 per unit on the basis of current market price and Tk. 12.18 per unit on the basis of cost price against face value of Tk. 10.00 whereas total Net Assets of the Fund stood at Tk. 503,235,400.06 on the basis of current market price and Tk. 731,070,089.60 on the basis of cost price after considering all assets and liabilities of the Fund.			

**Considering current outstanding no. of shares; *Changes/ return has calculated based on the dividend adjusted price on record date * Change in price of stocks calculated with the previous close price and today's close price. *PE excludes stocks with negative earnings and Z category *Turnover includes block trade*

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