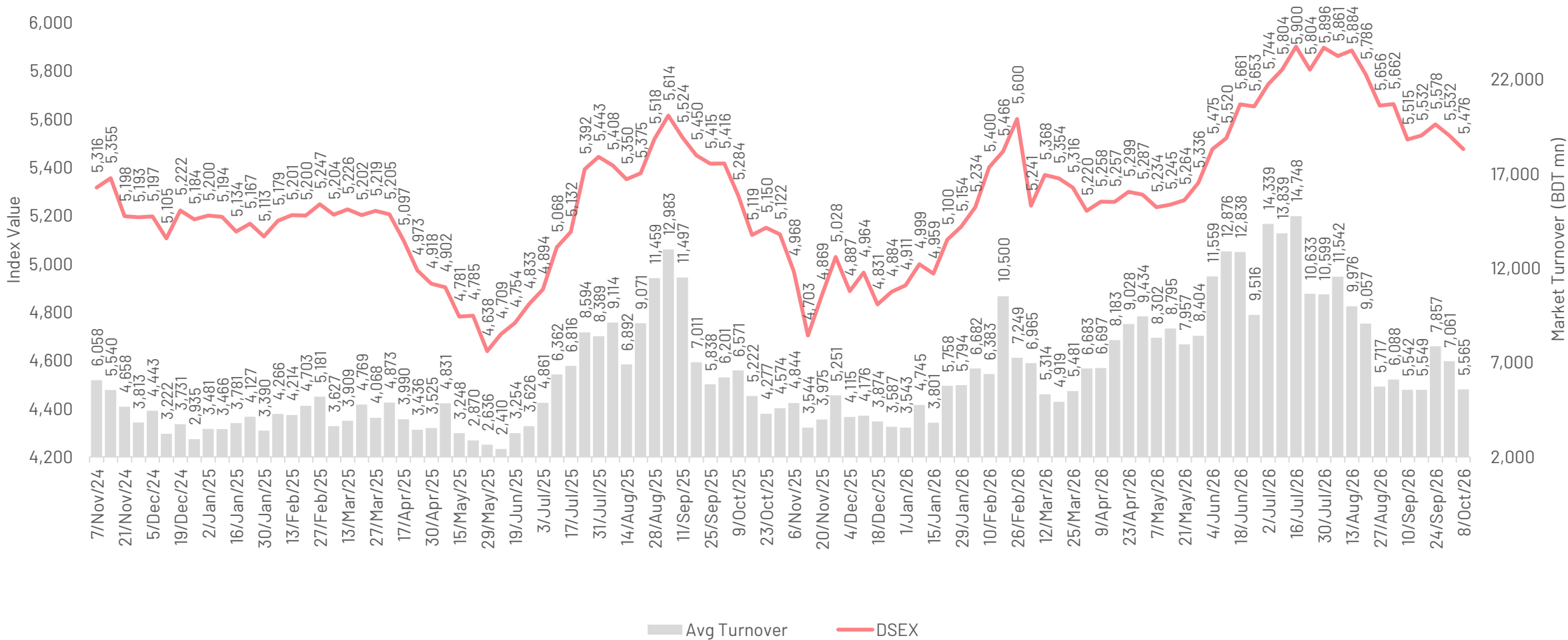


IDLC-SL Weekly Market Summary

04 Oct 2026 – 08 Oct 2026

DSEX was **down by 1.0%** during 04 Oct - 08 Oct 2026



Average daily turnover was **down by 21.2%** this week

Avg. daily turnover this week
BDT 5,565mn

Avg. turnover last week
BDT 7,061mn

Change **-21.2%**

Turnover increase this week:

Jute
Tannery
Life Insurance
Food
Paper & Printing
Fuel & Power
Engineering

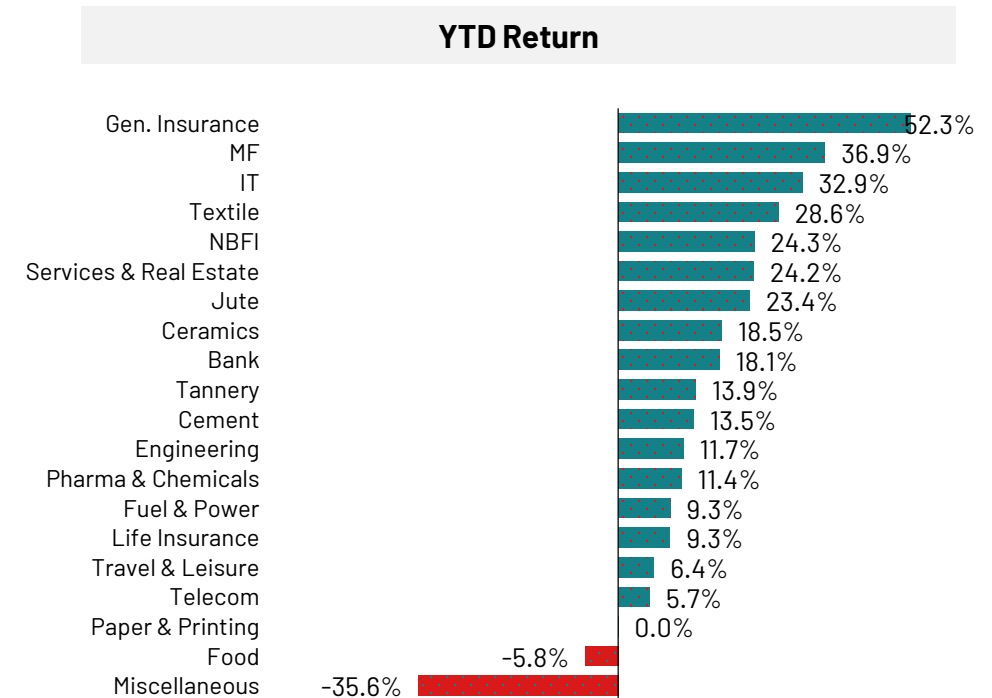
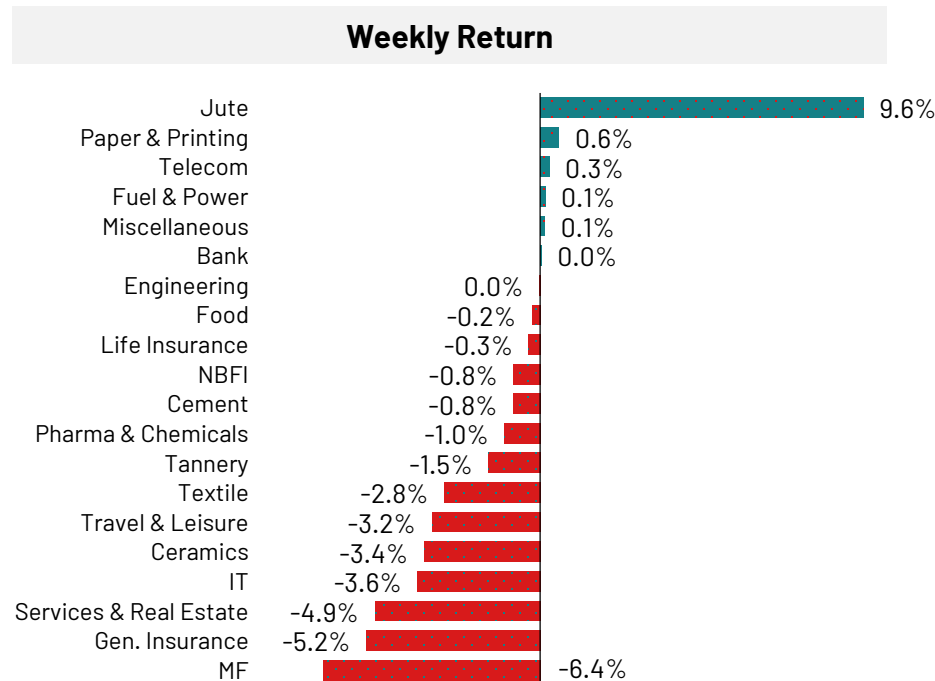
Turnover decrease this week:

Cement
Gen. Insurance
NBFI
MF
Services & Real Estate
Travel & Leisure
Pharma & Chemicals

Sector	ADT this week (BDT mn)	Turnover %	ADT last week (BDT mn)	Turnover %	Change in Turnover
Textile	1674	30%	1840	26%	-9%
Gen. Insurance	599	11%	1332	19%	-55%
Pharma & Chemicals	598	11%	808	11%	-26%
Bank	455	8%	506	7%	-10%
Engineering	412	7%	393	6%	5%
MF	297	5%	529	8%	-44%
Food	249	4%	198	3%	26%
Life Insurance	223	4%	169	2%	32%
Miscellaneous	180	3%	228	3%	-21%
NBFI	172	3%	341	5%	-50%
Fuel & Power	155	3%	131	2%	19%
Jute	104	2%	45	1%	132%
IT	98	2%	108	2%	-10%
Tannery	75	1%	56	1%	34%
Services & Real Estate	66	1%	102	1%	-36%
Paper & Printing	56	1%	45	1%	23%
Ceramics	52	1%	60	1%	-14%
Travel & Leisure	32	1%	48	1%	-33%
Telecom	32	1%	36	1%	-12%
Cement	29	1%	72	1%	-60%

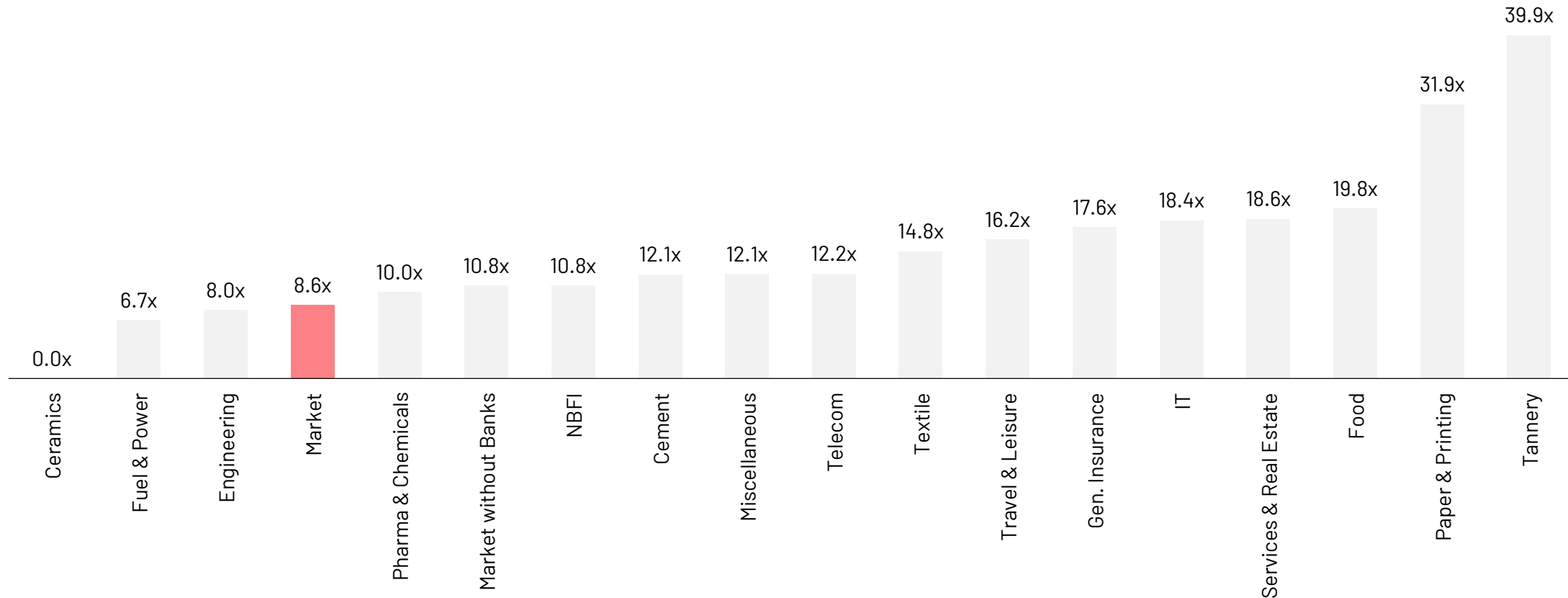
Sector-wise weekly return

- **Major gainers:** Jute (9.6%), Paper & Printing (0.6%), Telecom (0.3%), Fuel & Power (0.1%)
- **Major losers:** MF (-6.4%), Gen. Insurance (-5.2%), Services & Real Estate (-4.9%), IT (-3.6%), Ceramics (-3.4%), Travel & Leisure (-3.2%), Textile (-2.8%)



Note: Sector Return is calculated based on the total market cap of the sector and adjusted for dividend.

Adjusted LTM market P/E stands at 8.6x



Note: To calculate the P/E, we selected stocks that meet ALL of the following criteria – (a) stocks that are included in DSEX index; (b) generated positive earnings in the Last Twelve Months (LTM); (c) LTM P/E less than 125x; (d) excluded LINDEBD due to high one-off gain.
P/E as of the last trading session of the reporting week.

Top 20 stocks by Avg. Daily Turnover (ADT)

No	Company	Sector	Category	MCAP (BDT Mn)	CP	Turnover (BDT Mn)	Turnover %	Return	LTM P/E	P/B
1	PTL	Textile	A	13,989	78.1	229	4%	-4.6%	12.1x	1.6x
2	SAIHAMTEX	Textile	B	4,102	45.3	211	4%	6.6%	72.7x	1.0x
3	ETL	Textile	B	2,940	16	188	3%	0.6%	24.9x	1.2x
4	IPDC	NBFI	A	13,188	30.7	114	2%	-7.3%	25.8x	1.8x
5	BRACBANK	Bank	A	152,027	66.4	111	2%	1.1%	6.7x	1.3x
6	MALEKSPIN	Textile	A	9,157	47.3	109	2%	-5.4%	8.3x	0.7x
7	ORIONINFU	Pharma & Chemicals	A	5,106	250.8	104	2%	-2.7%	143.8x	15.5x
8	APEXFOODS	Food	A	1,872	328.3	104	2%	26.7%	44.8x	2.0x
9	SONALIANSH	Jute	A	2,656	244.8	103	2%	12.3%	26.7x	1.0x
10	ENVOYTEX	Textile	A	11,943	71.2	98	2%	-2.2%	8.6x	1.2x
11	SHARPIND	Textile	B	4,946	16.3	94	2%	-10.4%	n/m	2.1x
12	MATINSPINN	Textile	A	7,078	72.6	87	2%	6.5%	16.6x	1.0x
13	SONALILIFE	Life Insurance	A	4,845	102	86	2%	12.5%	63.0x	3.2x
14	ACMEPL	Pharma & Chemicals	B	3,388	25.1	80	1%	-0.0%	n/m	1.6x
15	BDLAMPS	Engineering	A	2,812	267.1	74	1%	17.1%	n/m	5.7x
16	SAIHAMCOT	Textile	B	3,347	22.5	74	1%	-5.9%	24.9x	0.6x
17	BEXIMCO	Miscellaneous	B	21,223	22.5	71	1%	8.2%	n/a	0.3x
18	DOMINAGE	Engineering	B	6,679	65.1	71	1%	-1.5%	n/m	3.8x
19	BXPHARMA	Pharma & Chemicals	A	64,508	144.6	65	1%	-1.8%	7.5x	1.3x
20	TECHNODRUG	Pharma & Chemicals	A	4,686	35.5	62	1%	-13.8%	23.2x	1.1x

Greater than 10%
3% - 10%
-3% to +3%
-3% to -10%
Less than -10%

Note: Turnover considers only DSE turnover data and excludes block transactions. n/a = not available. n/m = not meaningful. LTM = Last Twelve Month.

Note: Return adjusted for dividend.

Top 20 Weekly Block Transactions

No	Company	Category	Volume	Value (BDT mn)	Avg. Price (BDT)
1	SAIHAMTEX	B	9,005,984	381	42.3
2	SQURPHARMA	A	932,538	202	217.1
3	BRACBANK	A	2,172,445	141	65.1
4	PTL	A	1,683,662	133	78.9
5	APEXSPINN	A	260,116	100	383.0
6	ALARABANK	Z	5,651,000	90	15.9
7	PRIMEBANK	A	3,130,660	88	28.1
8	SUNLIFEINS	B	1,053,638	70	66.1
9	CITYGENINS	A	383,991	50	130.4
10	JAMUNABANK	A	2,175,000	50	22.9
11	PUBALIBANK	A	1,250,000	49	39.0
12	NHFIL	A	1,650,000	44	26.5
13	BDLAMPS	A	188,547	44	231.5
14	ETL	B	2,725,804	42	15.3
15	BNICL	A	204,920	36	176.4
16	LEGACYFOOT	B	567,035	35	61.9
17	MARICO	A	13,150	35	2,640.0
18	ASIATICLAB	A	254,600	28	108.2
19	SIPLC	A	151,692	21	139.4
20	DAFODILCOM	B	138,200	21	151.8

Note: Block market transactions contributed 6.8% of total market turnover this week

Top 20 Gainers

Weekly

No	Company	Sector	Category	CP	Return	LTM P/E	P/B
1	APEXFOODS	Food	A	328.3	26.7%	44.8x	2.0x
2	BDLAMPS	Engineering	A	267.1	17.1%	n/m	5.7x
3	AZIZPIPES	Engineering	Z	86.3	13.0%	n/m	n/m
4	SONALILIFE	Life Insurance	A	102	12.5%	63.0x	3.2x
5	SONALIANS	Jute	A	244.8	12.3%	26.7x	1.0x
6	DESCO	Fuel & Power	Z	25.3	11.9%	86.9x	0.6x
7	ECABLES	Engineering	B	132.2	11.7%	n/m	0.4x
8	SHYAMPSUG	Food	Z	314.7	9.5%	n/m	n/m
9	ALLTEX	Textile	Z	25.3	9.5%	72.0x	0.9x
10	SAMATALETH	Tannery	B	105.2	8.9%	n/m	7.3x
11	BSRMSTEEL	Engineering	A	90.2	8.8%	5.6x	0.9x
12	TUNGHAI	Textile	Z	5	8.7%	n/a	n/m
13	INTRACO	Fuel & Power	Z	23.9	8.6%	n/m	1.8x
14	BEXIMCO	Miscellaneous	B	22.5	8.2%	n/a	0.3x
15	SONARGAON	Textile	B	116.6	7.1%	n/m	6.4x
16	ICB	NBFI	B	41	7.0%	n/m	1.3x
17	SAIHAMTEX	Textile	B	45.3	6.6%	72.7x	1.0x
18	MATINSPINN	Textile	A	72.6	6.5%	16.6x	1.0x
19	APEXSPINN	Textile	A	391.7	5.7%	124.7x	4.7x
20	KTL	Textile	Z	14	5.3%	175x	0.9x

Note: n/a = not available. n/m = not meaningful. LTM = Last Twelve Month.

YTD

No	Company	Sector	Category	CP	Return	LTM P/E	P/B
1	DAFODILCOM	IT	B	167.1	336.2%	3882.5x	11.8x
2	ILFSL	NBFI	Z	2.5	281.8%	n/m	n/m
3	SONARGAON	Textile	B	108.9	277.3%	n/m	6.4x
4	BNICL	Gen. Insurance	A	115.2	271.1%	28.0x	4.7x
5	FASFIN	NBFI	Z	2.9	267.6%	n/m	n/m
6	FAREASTFIN	NBFI	Z	2.5	250.0%	n/m	0.0x
7	MEGHNA PET	Food	Z	81.1	243.1%	n/m	1.1x
8	PREMIERLEA	NBFI	Z	2.9	233.3%	n/m	n/m
9	TUNGHAI	Textile	Z	3.6	212.5%	nanx	n/m
10	PLFSL	NBFI	Z	2.4	201.9%	n/m	n/m
11	SIPLC	Gen. Insurance	A	119.8	172.7%	27.6x	4.6x
12	PFISTMF	MF	A	14.2	172.0%	nanx	1.7x
13	SAIHAMTEX	Textile	B	26.4	164.9%	72.7x	1.0x
14	MBLISTMF	MF	A	7.7	164.7%	nanx	0.9x
15	PRIMEFIN	NBFI	Z	3.8	140.0%	nanx	n/m
16	DOMINAGE	Engineering	B	84.6	125.3%	n/m	3.8x
17	ASIATICLAB	Pharma & Chemicals	A	117.9	123.8%	24.4x	1.8x
18	APEXSPINN	Textile	A	341.2	120.7%	124.7x	4.7x
19	CAPMIBBLMF	MF	A	14	114.3%	nanx	2.0x
20	MEGCONMILK	Food	Z	34.1	111.8%	n/m	n/m

Top 20 Losers

Weekly

No	Company	Sector	Category	CP	Return	LTM P/E	P/B
1	PF1STMF	MF	A	13.6	-22.7%	n/a	1.7x
2	SILVAPHL	Pharma & Chemicals	B	10.4	-16.8%	n/m	0.7x
3	MBL1STMF	MF	A	9	-16.7%	n/a	0.9x
4	SAIFPOWER	Services & Real Estate	Z	6.4	-15.8%	n/a	0.4x
5	EXIM1STMF	MF	A	5.4	-15.6%	n/a	0.7x
6	FEKDIL	Textile	A	18.5	-15.1%	n/m	1.0x
7	GSPFINANCE	NBFI	Z	3	-14.3%	n/m	n/m
8	PENINSULA	Travel & Leisure	B	16.8	-13.8%	45.2x	0.6x
9	TECHNODRUG	Pharma & Chemicals	A	35.5	-13.8%	23.2x	1.1x
10	1STPRIMFMF	MF	A	27	-13.7%	n/a	2.8x
11	PRIME1ICBA	MF	A	6.5	-13.3%	n/a	0.8x
12	MAKSONSPIN	Textile	Z	4.8	-12.7%	n/m	1.7x
13	PRIMEINSUR	Gen. Insurance	A	43.9	-12.5%	20.7x	2.1x
14	AFCAGRO	Pharma & Chemicals	Z	5	-12.3%	n/a	0.3x
15	BEACHHATCH	Food	Z	23.4	-12.0%	n/a	1.4x
16	REGENTTEX	Textile	Z	5.2	-11.9%	n/a	0.2x
17	APOLOISPAT	Engineering	Z	2.4	-11.1%	n/a	3.4x
18	PLFSL	NBFI	Z	1.6	-11.1%	n/m	n/m
19	NPOLYMER	Engineering	B	29	-11.0%	n/m	1.0x
20	SHEPHERD	Textile	B	11.4	-10.9%	n/m	0.9x

YTD

No	Company	Sector	Category	CP	Return	LTM P/E	P/B
1	BEXIMCO	Miscellaneous	B	22.5	-79.6%	n/a	0.3x
2	RAHIMAFood	Food	Z	68.2	-57.0%	572.3x	7.5x
3	BEACHHATCH	Food	Z	23.4	-49.8%	n/a	1.4x
4	AL-HAJTEX	Textile	B	74.5	-46.1%	n/m	5.3x
5	BDWELDING	Fuel & Power	Z	11.0	-37.9%	n/a	0.9x
6	ISNLTD	IT	B	49.2	-36.8%	n/m	23.0x
7	AIL	Textile	Z	29.1	-28.5%	n/a	1.2x
8	PROGRESLIF	Life Insurance	Z	34.9	-28.0%	n/a	n/a
9	LOVELLO	Food	A	48.9	-27.7%	15.7x	3.6x
10	CAPMBDBLMF	MF	A	7.2	-27.3%	n/a	0.9x
11	KBPPWBIL	Miscellaneous	A	34.5	-27.2%	50.6x	2.9x
12	ORIONINFU	Pharma & Chemicals	A	250.8	-26.6%	143.8x	15.5x
13	RELIANCE1	MF	A	11.5	-26.3%	n/a	1.0x
14	AFTABAUTO	Engineering	Z	25.0	-25.8%	n/m	0.5x
15	INTECH	IT	Z	23.5	-25.4%	n/m	n/m
16	BDFINANCE	NBFI	Z	10.2	-23.9%	7.9x	n/m
17	GEMINISEA	Food	Z	106.0	-22.4%	n/a	8.6x
18	DACCADYE	Textile	Z	14.9	-22.4%	n/m	n/m
19	ISLAMIBANK	Bank	Z	25.5	-22.3%	n/m	n/m
20	SALAMCRST	Engineering	Z	11.4	-21.9%	n/a	0.6x

Note: n/a = not available. n/m = not meaningful. LTM = Last Twelve Month.

Important Headline this week

Economy

- Export growth picks [up](#) as garment rebounds
- Private sector turns [away](#) from foreign loans
- Trade deficit widens 29pc in first two [months](#) of FY27
- Exit costly [T-bonds](#): Govt's new plan to ease interest burden
- Inflation edges up to 8.34pc [on](#) food costs after fuel price hike
- Manufacturing, services lift Apr-Jun [GDP](#) growth to 4.6pc

Banking

- Govt plans to [borrow](#) BDT 301bn (USD 2.45bn) through treasury bills, bonds in October-December
- BB [allows](#) FC accounts for foreign loans

Energy & Power

- 442MW Rampal solar project awaits [ECNEC](#) approval
- BERC raises Jet [A-1](#) prices for domestic, international flights

Important Headline this week

Energy and Power

- New energy roadmap targets [local](#) coal, gas, solar

Trade and Commerce

- IDRA [settles](#) BDT 263.7mn (USD 2.15mn) in insurance claims in 3rd phase
- Ctg Port [to](#) go fully digital by Dec
- Partial production [resumes](#) at nine closed state-run jute mills

Capital Market

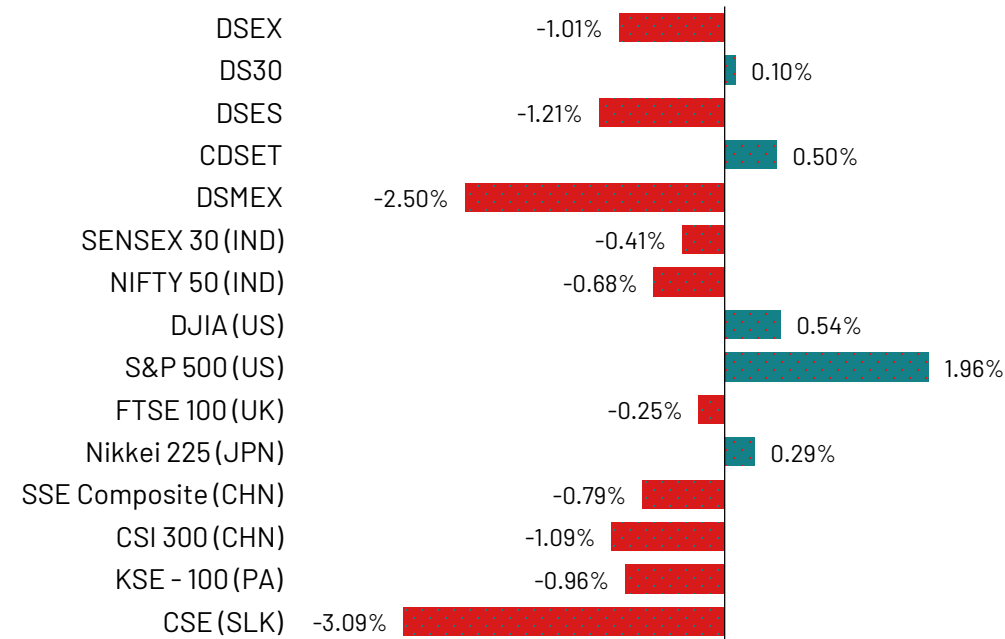
- Foreign transactions in capital market rise 37.6pc [in](#) 8 months
- [ICB](#) to expand trading network via sponsors
- Apex Foods shares jump 19pc [as](#) profit soars 121pc in FY26
- Govt lifts 16-year ban [on](#) direct listing
- Beximco, Shinepukur boards reshuffled, [excluding](#) Salman

Important **Corporate** Headline this week

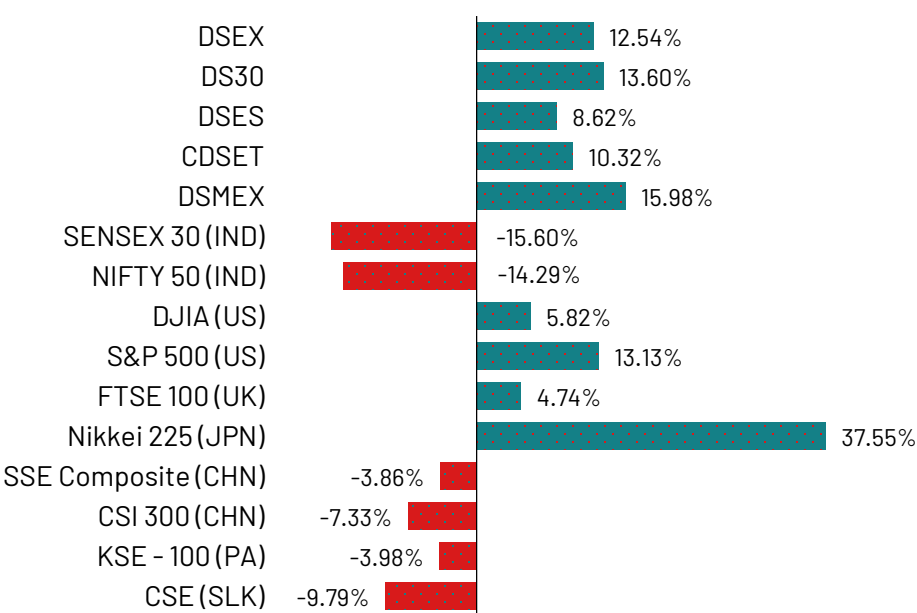
- Akij Resource acquires 30pc stake in [Dominage](#) Steel
- Eastern [Housing](#) profit falls 19pc on weak Q4 earnings
- GPH Ispat seeks BB [help](#) to reschedule part of its BDT 120bn (USD 0.98bn) debt

Major World Index Updates

Weekly



YTD



Commodity Price Updates

Commodity (USD)	Unit	Price	Weekly Change (%)	YTD	
Brent	USD/Bbl	104.4	4.1%	70.2%	Greater than 10%
Gold	USD/t.oz	4120.3	-1.0%	-5.0%	3% - 10%
Wheat	USd/Bu	687.8	1.3%	34.7%	-3% to +3%
Cotton	USd/Lbs	80.6	3.3%	25.4%	-3% to -10%
Soybeans	USd/Bu	1292.6	0.1%	23.5%	Less than -10%
Sugar	USd/Lbs	20.9	10.4%	40.6%	
LNG Japan/Korea Marker PLATTS	USD (Index)	25.9	0.5%	169.4%	
Iron Ore	USD/T	91.1	-5.7%	-14.9%	
Coal	USD/T	150.2	2.6%	19.5%	
UK Gas	GBp/thm	198.0	5.8%	174.8%	
Steel	CNY/T	3063.0	-1.5%	-1.4%	
Containerized Freight Index	Points	3662.3	0%	121.1%	
Silver	USD/t.oz	58.8	-2.6%	-22.8%	

Weekly Summary

- Index: DSEX was **down by 1.01%** during the week, closing around 5,476
- **Turnover:**
 - Average daily turnover (ADT) for YTD 2026 was BDT 8,356mn.
 - ADT for the week (04 Oct 2026 – 08 Oct 2026) was BDT 5,565mn which was **21.2% less** than the previous week.
- **Market P/E was 8.6x (08 Oct 2026)**
- **Sector Highlights:**
 - **Major sectors by turnover:** Textile (30%), Gen. Insurance (11%), Pharma & Chemicals (11%), Bank (8%), Engineering (7%), MF (5%), Food (4%)
 - **Increase in ADT this week:** Jute, Tannery, Life Insurance, Food, Paper & Printing, Fuel & Power, Engineering
 - **Decrease in ADT this week:** Cement, Gen. Insurance, NBFI, MF, Services & Real Estate, Travel & Leisure, Pharma & Chemicals
 - **Major gainers:** Jute (9.6%), Paper & Printing (0.6%), Telecom (0.3%), Fuel & Power (0.1%), Miscellaneous (0.1%)
 - **Major losers:** MF (-6.4%), Gen. Insurance (-5.2%), Services & Real Estate (-4.9%), IT (-3.6%), Ceramics (-3.4%), Travel & Leisure (-3.2%), Textile (-2.8%)
- **Stock Highlights:**
 - **Major Turnover:** PTL, SAIHAMTEX, ETL, IPDC, BRACBANK, MALEKSPIN, ORIONINFU, APEXFOODS, SONALIANS, ENVOYTEX, SHARPIND, MATINSPINN
 - **Major gainers:** APEXFOODS (+26.7%), BDLAMPS (+17.1%), AZIZPIPES (+13.0%), SONALILIFE (+12.5%), SONALIANS (+12.3%), DESCO (+11.9%), ECABLES (+11.7%)
 - **Major losers:** PF1STMF (-22.7%), SILVAPHL (-16.8%), MBL1STMF (-16.7%), SAIFPOWER (-15.8%), EXIM1STMF (-15.6%), FEKDIL (-15.1%), GSPFINANCE (-14.3%)

Disclosures

Explanation of Research Recommendations

- Buy recommendation means – an upside of 15% or more within a trading range of 180 days.
- Sell recommendation means – a downside of 10% or more within a trading range of 180 days.
- Hold recommendation means – an upside or downside of less than the above within a trading range of 180 days.

The recommendations are based on data generally available in the market and reflect the prices, volatility, corporate information and general economic data available at the time of publication together with historical information in respect of the security(ies) or issuer(s). Further information in respect of the basis of any valuation is available from the analyst on request.

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Research Team



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Senior Research Associate

Mohammad Tashnim is a Research Associate at IDLC Securities Limited. He has started his journey as a Management Trainee of IDLC in May 2024. Prior to joining in IDLC, Tashnim had worked in investment banking and in Finance & Accounts department of two other organizations. Tashnim has completed his MBA with Major in Finance from Institute of Business Administration, University of Dhaka in 2024 & completed his BBA from Bangladesh University of Professionals in 2019. Tashnim has completed CIMA Level 1 and a Post Graduate Diploma in Islamic Finance Practices.



Zareen Binte Shahjahan
Senior Research Associate

Zareen Binte Shahjahan is a Research Associate at IDLC Securities Limited. She started her career with IDLC Finance Limited from May 2024 through their Youth Leadership Management Trainee Program. She was placed in IDLC Securities Limited from October 2024. Zareen completed her undergraduate degree from Bangladesh University of Professionals in May 2024 where she majored in Finance and Banking.



Md Fahad Been Ayub
Business Analyst

Md. Fahad Been Ayub is a Business Analyst at IDLC Securities Limited, starting his tenure in July 2023 as a Senior Executive Officer. Before joining IDLC Securities Limited, Fahad worked as an Engineer in the Technology division at SSD-TECH. Fahad holds a Bachelor's degree in Computer Science and Engineering from Chittagong University of Engineering & Technology (CUET). To complement his technical background, he pursued an MBA with a major in Finance from the Institute of Business Administration (IBA), University of Dhaka, equipping him with a robust understanding of financial strategies and business management.



Muntasir Mohammad
Analyst

Muntasir Mohammad is an Analyst in the Equity Research Team at IDLC Securities Ltd. Before joining IDLC, he had worked as a Data Scientist at Robi Axiata Ltd. He holds a Bachelor's degree in Computer Science and Engineering from North South University and an MBA in Finance from Institute of Business Administration (IBA), University of Dhaka

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