Sheltech Brokerage Limited

Daily Market Wrap

November 19, 2026

Market Commentary

DSEX Ends Nearly Flat as Late-Session Bargain Hunting Offsets Early Losses

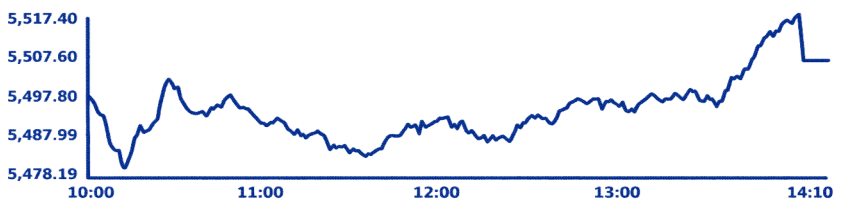
The DSEX index advanced by 4.80 points, or 0.09%, to close flat at 5,505.64, while turnover fell by 8.94% to BDT 7,466.35 Mn. Market breadth weakened further to 0.81x, indicating selective buying interest amid improved trading activity.

The market performance was primarily shaped by early profit-taking amid domestic political uncertainty, followed by late-session bargain hunting, particularly in the Textile and Fuel & Power stocks. The market came under strong selling pressure in the early session, dragging the benchmark index to an intraday low of 5,478.19 points. However, buying interest subsequently resurfaced and recovered the earlier losses, lifting the benchmark index to an intraday high of 5,517.40 points, before ultimately settling marginally above its opening level.

Sector returns were mixed, with Textile (2.60%) emerging as the best-performing sector, while Financial Institutions (-1.02%) being the worst-performing sector. Turnover remained concentrated in the Textile (26.24%), Fuel & Power (14.92%), and Bank (9.91%) sectors.

Looking ahead, investors are likely to assess whether buying interest can broaden sufficiently to support market stabilization. Upcoming earnings and dividend announcements by December year-end companies, BSEC's proposed market-development initiatives, and developments surrounding domestic political and geopolitical uncertainties are expected to remain key near-term directional catalysts.

DSEX Movement



DSE Performance Snapshot

Indices	Today	Yesterday	Change (+/-)	Change (%)
DSEX Index	5,505.64	5,500.84 ▲	4.80 ▲	0.09%
DS30 Index	2,085.73	2,088.49 ▼	-2.75 ▼	-0.13%
DSES Index	1,074.08	1,074.90 ▼	-0.82 ▼	-0.08%
Valuation	**Today**	**Yesterday**	**Change (+/-)**	**Change (%)**
Market Cap (BDT Bn)	6,733.72	6,742.12 ▼	-8.39 ▼	-0.12%
Forward P/E (x)	8.23x	8.23x ▼	0.00 ▼	-0.04%
Trailing P/E (x)	8.39x	8.41x ▼	-0.01 ▼	-0.14%

Liquidity	Today	Yesterday	Change (+/-)	Change (%)
Turnover (BDT Mn)	7,466.35	8,199.03 ▼	-732.68 ▼	-8.94%
Volume (Shares Mn)	215.68	241.58 ▼	-25.90 ▼	-10.72%
Trade (Shares)	201,554	213,304 ▼	-11750.00 ▼	-5.51%
Breadth	**Advanced**	**Declined**	**Unchanged**	**A/D Ratio (x)**
No of Issues	132	162	96	0.81x

DSE SME Board Performance Snapshot

Indices	Today	Yesterday	Change (+/-)	Change (%)
DSMEX Index	922.91	913.32 ▲	9.59 ▲	1.05%

Liquidity	Today	Yesterday	Change (+/-)	Change (%)
Turnover (BDT Mn)	45.71	20.42 ▲	25.29 ▲	123.87%
Volume (Shares Mn)	1.48	0.96 ▲	0.52 ▲	54.55%
Trade (Shares)	2,289	2,141 ▲	148.00 ▲	6.91%

DSE Sectoral Summary

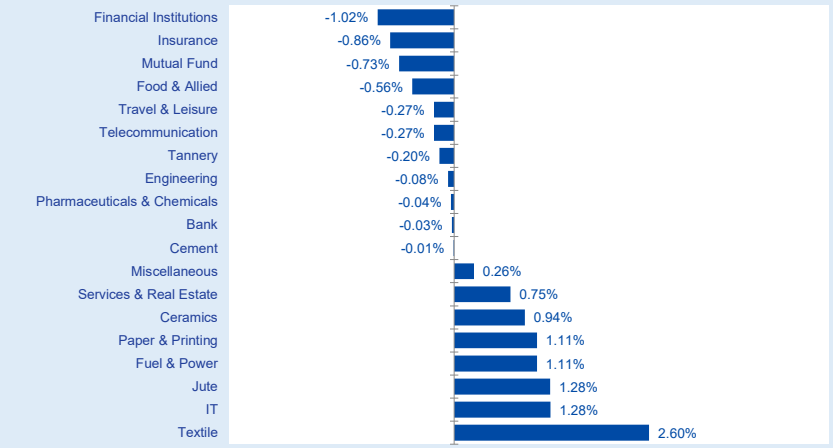
Sector	Market Cap (BDT Mn)	Change (%)	Market Cap Share (%)	Turnover (BDT Mn)	Change (%)	Turnover Share (%)	Index Impact (+/-)	A/D Ratio (x)	Forward P/E (x)	Trailing P/E (x)
Bank	744,998.97 ▼	-0.03%	21.94%	716.39 ▼	-40.70%	9.91% ▼	-2.43	0.89x	5.79x	5.33x
Cement	86,273.25 ▼	-0.01%	2.54%	23.93 ▲	7.52%	0.33% ▲	0.30	1.50x	18.96x	14.91x
Ceramics	20,625.27 ▲	0.94%	0.61%	21.40 ▼	-89.02%	0.30% ▲	0.25	3.00x	351.69x	362.93x
Engineering	269,352.95 ▼	-0.08%	7.93%	633.14 ▼	-0.16%	8.76% ▼	-0.50	1.00x	9.87x	9.45x
Financial Institutions	94,063.83 ▼	-1.02%	2.77%	125.83 ▼	-2.49%	1.74% ▼	-3.21	0.09x	18.82x	19.30x
Food & Allied	201,664.73 ▼	-0.56%	5.94%	323.01 ▼	-20.66%	4.47% ▼	-1.34	1.13x	18.60x	28.60x
Fuel & Power	303,119.47 ▲	1.11%	8.93%	1,078.39 ▲	7.03%	14.92% ▲	4.33	2.17x	6.00x	8.32x
Insurance	164,308.05 ▼	-0.86%	4.84%	656.17 ▼	-23.85%	9.08% ▼	-2.95	0.17x	20.16x	23.52x
IT	30,698.02 ▲	1.28%	0.90%	97.50 ▼	-41.92%	1.35% ▲	1.02	7.00x	36.75x	35.52x
Jute	2,700.95 ▲	1.28%	0.08%	79.00 ▲	3.94%	1.09% ▲	0.11	2.00x	29.50x	27.06x
Miscellaneous	135,085.07 ▲	0.26%	3.98%	429.14 ▲	7.87%	5.94% ▲	0.97	1.33x	14.65x	16.53x
Mutual Fund	28,941.06 ▼	-0.73%	0.85%	206.10 ▲	23.94%	2.85% ▬	0.00	0.19x	41.49x	48.58x
Paper & Printing	20,177.13 ▲	1.11%	0.59%	79.42 ▲	3.97%	1.10% ▲	0.30	3.00x	32.25x	47.10x
Pharmaceuticals & Chemicals	566,196.83 ▼	-0.04%	16.67%	556.49 ▼	-33.87%	7.70% ▼	-0.37	0.73x	9.06x	9.97x
Services & Real Estate	26,186.33 ▲	0.75%	0.77%	149.97 ▲	100.82%	2.08% ▲	0.27	3.00x	13.96x	19.98x
Tannery	23,078.28 ▼	-0.20%	0.68%	64.64 ▼	-0.80%	0.89% ▼	-0.05	0.50x	28.39x	44.59x
Telecommunication	487,696.64 ▼	-0.27%	14.36%	57.74 ▼	-9.68%	0.80% ▼	-0.59	0.00x	11.78x	11.68x
Textile	155,902.65 ▲	2.60%	4.59%	1,896.14 ▲	25.70%	26.24% ▲	8.42	2.82x	17.07x	21.31x
Travel & Leisure	34,631.50 ▼	-0.27%	1.02%	31.66 ▼	-25.26%	0.44% ▼	-0.14	0.50x	27.72x	31.46x

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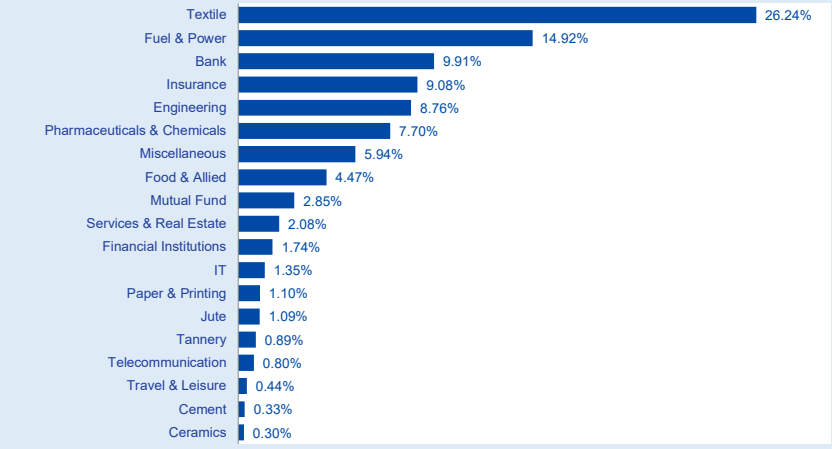
Daily Market Wrap

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Sectoral Return Distribution



Sectoral Turnover Composition



Daily Top Gainers

Ticker	Close Price (BDT)	Change (%)	Turnover (BDT Mn)	Change (%)	Forward P/E (x)	Trailing P/E (x)
MATINSPINN (A)	137.80	9.98%	123.92	13.87%	13.73x	17.71x
RAHIMAFOOD (B)	77.30	9.80%	21.48	n/a	386.50x	n/a
MALEKSPIN (A)	59.70	9.74%	406.61	6.61%	9.27x	8.98x
TITASGAS (B)	23.40	9.35%	137.65	34.40%	3.93x	n/a
WATACHEM (A)	183.10	8.22%	110.31	91.43%	14.04x	39.21x
ZEALBANGLA (Z)	177.80	7.95%	11.11	n/a	n/a	n/a
HWAWELLTEX (A)	50.80	6.28%	83.08	269.49%	19.24x	15.54x
AAMRATECH (Z)	17.60	5.39%	1.06	-47.70%	n/a	n/a
AFCAGRO (Z)	6.00	5.26%	1.94	-13.01%	26.47x	n/a
AL-HAJTEX (B)	80.70	5.22%	58.79	n/a	57.64x	n/a

Daily DSEX Pullers

Ticker	Close Price (BDT)	Change (%)	Index Weight (%)	Index Impact (+)
PRIMEBANK(A)	32.40	3.51%	1.8%	3.42
MATINSPINN(A)	137.80	9.98%	0.6%	3.24
MALEKSPIN(A)	59.70	9.74%	0.4%	2.14
TITASGAS(B)	23.40	9.35%	0.4%	1.96
EBL(A)	24.10	0.84%	2.0%	0.92
SPCL(A)	70.60	3.67%	0.4%	0.86
PUBALIBANK(A)	44.70	0.45%	3.4%	0.84
CROWNCEMNT(A)	58.10	3.75%	0.4%	0.73
BSC(A)	116.10	2.11%	0.6%	0.69
ASIATICLAB(A)	116.70	1.83%	0.6%	0.60

Daily Top Losers

Ticker	Close Price (BDT)	Change(%)	Turnover (BDT Mn)	Chnage(%)	Forward P/E (x)	Trailing P/E (x)
LANKABAFIN(Z)	12.20	-13.48%	73.87	227.13%	n/a	n/a
PLFSL(Z)	1.50	-6.25%	1.05	-65.31%	n/a	n/a
BAYLEASING(Z)	4.50	-4.26%	11.92	887.24%	n/a	n/a
ISLAMIBANK(Z)	25.60	-4.12%	5.53	-79.46%	n/a	n/a
GENNEXT(Z)	2.40	-4.00%	0.81	-54.44%	n/a	n/a
PF1STMF(A)	10.20	-3.77%	28.11	-5.55%	n/a	18.89x
PRIMEFIN(Z)	2.60	-3.70%	0.37	163.38%	n/a	n/a
BDFINANCE(Z)	10.80	-3.57%	5.08	112.30%	13.50x	8.85x
KPPL(Z)	11.60	-3.33%	1.90	160.30%	n/a	n/a
AOL(Z)	15.80	-3.07%	2.11	-36.54%	9.94x	n/a

Daily DSEX Draggers

Ticker	Close Price (BDT)	Change (%)	Index Weight (%)	Index Impact (-)
ISLAMIBANK(Z)	25.60	-4.12%	3.1%	(6.99)
LANKABAFIN(Z)	12.20	-13.48%	0.4%	(2.68)
SQURPHARMA(A)	209.70	-0.29%	7.5%	(1.17)
BATBC(A)	192.30	-0.98%	2.0%	(1.07)
OLYMPIC(A)	138.60	-1.49%	1.3%	(1.04)
UCB(Z)	8.70	-1.14%	1.3%	(0.82)
LHB(A)	48.80	-0.81%	1.5%	(0.69)
GPHISPAT(B)	15.80	-2.47%	0.4%	(0.53)
IFIC(Z)	4.90	-2.00%	0.5%	(0.51)
ROBI(A)	29.60	-0.67%	1.1%	(0.41)

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Daily Turnover Leaders

Ticker	Turnover (BDT Mn)	Change(%)	Turnover Share (%)	Block Turnover (BDT Mn)	Close Price (BDT)	Change(%)
MALEKSPIN(A)	406.61	6.61%	5.63%	7.73	59.70	9.74%
SPCL(A)	238.45	2.51%	3.30%	0.00	70.60	3.67%
BPPL(B)	218.03	32.15%	3.02%	1.09	25.10	4.15%
RUNNERAUTO(A)	195.49	44.90%	2.71%	1.72	53.00	1.92%
PRIMEBANK(A)	177.98	-27.68%	2.46%	0.00	32.40	3.51%
SONARGAON(B)	167.18	n/a	2.31%	40.23	135.40	3.75%
ASIATICLAB(A)	162.83	-7.00%	2.25%	2.53	116.70	1.83%
DOREENPWR(A)	160.33	-5.83%	2.22%	0.00	44.30	1.84%
INTRACO(B)	155.82	71.69%	2.16%	6.70	27.20	3.42%
FEKDIL(A)	146.29	275.35%	2.02%	4.07	23.10	3.59%

Daily Block Turnover Leaders

Ticker	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Volume (Shares)
SQURPHARMA (A)	215.80	210.00	67.32	0.32
BRACBANK (A)	66.20	65.80	48.97	0.74
SONARGAON (B)	138.00	130.00	40.23	0.31
BDLAMPS (A)	237.00	220.00	14.56	0.07
MALEKSPIN (A)	55.00	51.00	7.73	0.15
NITOLINS (A)	60.40	60.40	6.76	0.11
INTRACO (B)	25.00	25.00	6.70	0.27
PRIMEINSUR (A)	40.00	40.00	5.99	0.15
CITYBANK (A)	28.90	28.90	5.78	0.20
CITYGENINS (A)	135.40	135.40	5.01	0.04

Regional Peer Market Indices Perfomance

Indices	Country	Today	Yesterday	Change (+/-)	Change (%)
S&P BSE SENSEX	India	82,907.56	82,065.21	842.35	1.03%
KSE 100	Pakistan	176,962.80	176,789.19	173.61	0.10%
ASPI	Sri Lanka	21,543.91	21,427.46	116.45	0.54%
FTSE Bursa Malaysia KLCI	Malaysia	1,566.16	1,566.73	-0.57	-0.04%
IDX COMPOSITE	Indonesia	5,181.14	5,247.88	-66.74	-1.27%
SET Index	Thailand	1,468.87	1,473.57	-4.70	-0.32%
VN-Index	Vietnam	1,689.62	1,704.43	-14.81	-0.87%

Important News

LANKABAFIN: Category Change: The Company will be placed in 'Z' category from existing 'A' category with effect from November 22, 2026 as the company has failed to declare any dividend for a period of 2 (two) consecutive years according to provision 1(a) of BSEC Directive No. BSEC/CMRRCD/2009-193/77 dated May 20, 2024.

SAIFPOWER: Reschedule of Board Meeting under LR 19(1): The Company has further informed that due to unavoidable circumstances, the meeting of the Board of Directors of the Company as per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, will be held on November 25, 2026 at 3:00 PM instead of earlier declared on November 19, 2026 to consider, among others, audited financial statements of the Company for the year ended June 30, 2025.

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