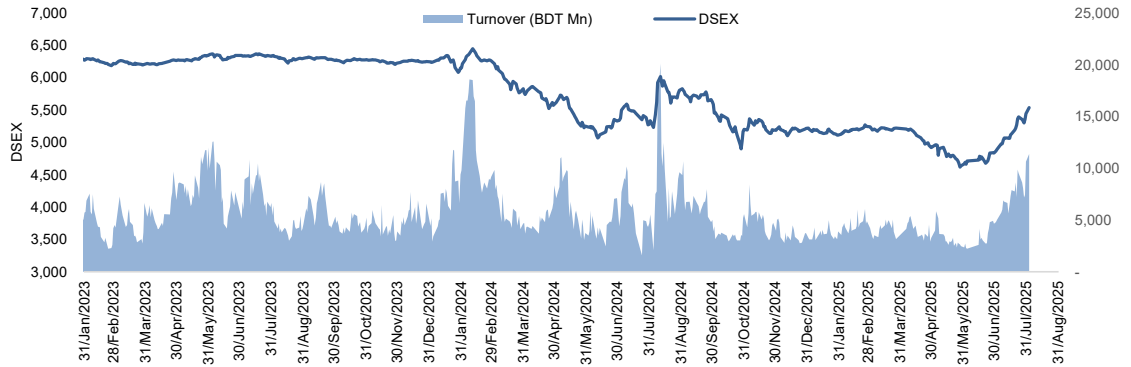


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.70%) gained 92.73 points and closed at 5,536.14. The blue-chip index DS30 (+1.71%), the Shariah-based index DSES (+1.96%), and the large-cap index CDSET (+1.81%) closed at 2,150.46, 1,193.56, and 1,144.22 points, respectively. All of the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 2.99% followed by Engineering (+2.54%), Telecommunication (+2.48%), NBFi (+2.46%), Bank (+1.76%), Pharmaceutical (+1.66%), and Food & Allied (+1.45%), respectively. Block trades contributed 3.0% of the overall market turnover. Uttara Bank Limited (+4.1%) was the most traded share with a turnover of BDT 445 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,536.14	5,443.42	+92.73	+1.70%	+6.1%
DS30	2,150.46	2,114.35	+36.11	+1.71%	+10.9%
DSES	1,193.56	1,170.61	+22.95	+1.96%	+2.1%
CDSET	1,144.22	1,123.84	+20.38	+1.81%	+7.3%

	Advanced	Declined	Unchanged	Total
All Category	218	122	58	398
A Category (Equity)	142	54	23	219
B Category (Equity)	42	33	8	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	34	35	27	96
Mutual Funds	18	8	10	36
Corporate Bonds	1	0	1	2
Treasury Bonds	1	0	1	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,173,449	7,122,234	
	Mn USD	58,653	58,235	+0.7%
Turnover	Mn BDT	11,374	10,634	
	Mn USD	93	87	+7.0%
Volume	Mn Shares	444	402	+10.2%
No. of Trade		264,502	235,393	+12.4%

* Average Interbank Exchange Rate is BDT 122.30 as of Aug 03, 2025

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Figure: Sectorial Turnover (BDT Mn)

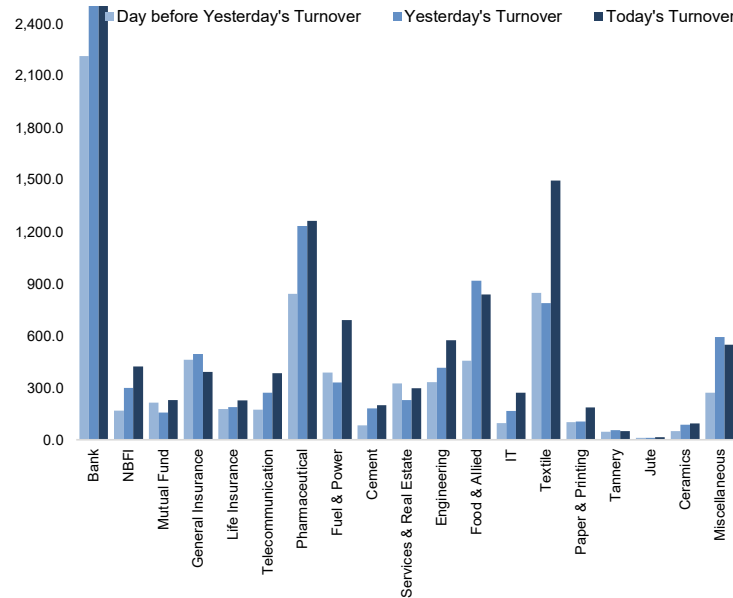
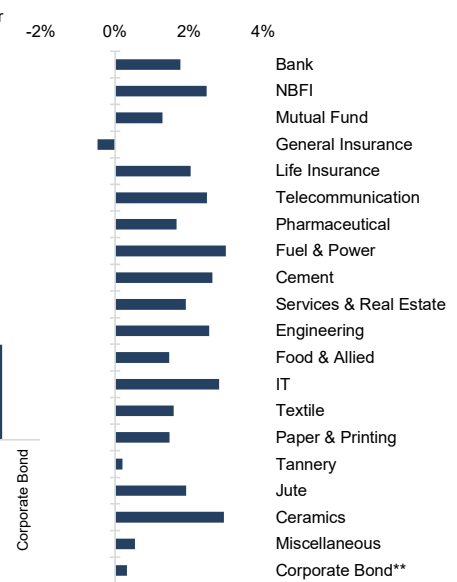


Figure: Sectorial Mcap Change



Market PE 16.7x

Market PB 1.3x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,640	1,612	+28.43	+1.76%	36	776,077	10.8%	2,855.1	25.9%	NM	0.9x	GP	430,071	11.5%	42.1	14.6x	7.6x
NBFI	1,133	1,106	+27.24	+2.46%	23	107,947	1.5%	422.5	3.8%	NM	NM	SQURPHARMA	205,834	5.5%	286.0	8.8x	1.5x
Mutual Fund	621	613	+7.87	+1.28%	37	29,758	0.4%	229.1	2.1%	NM	0.6x	BATBC	165,564	4.4%	122.3	13.3x	3.1x
General Insurance	2,778	2,792	-13.41	-0.48%	43	79,289	1.1%	392.0	3.6%	13.3x	1.2x	ROBI	148,757	4.0%	170.4	17.1x	2.3x
Life Insurance	1,802	1,766	+36.05	+2.04%	15	47,915	0.7%	226.6	2.1%	NM	NM	WALTONHIL	139,801	3.7%	13.0	10.8x	1.2x
Telecommunication	5,175	5,050	+125.23	+2.48%	3	606,846	8.5%	383.2	3.5%	15.4x	4.4x	BRACBANK	139,166	3.7%	156.0	9.8x	1.6x
Pharmaceutical	3,151	3,100	+51.42	+1.66%	34	597,395	8.3%	1,263.3	11.4%	13.7x	1.7x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,173	1,139	+34.10	+2.99%	23	310,844	4.3%	690.9	6.3%	19.6x	0.7x	MARICO	93,105	2.5%	27.5	15.2x	27.9x
Cement	2,187	2,131	+55.98	+2.63%	7	104,238	1.5%	198.5	1.8%	24.0x	2.3x	UPGDCL	80,346	2.1%	32.4	6.9x	1.9x
Services & Real Estate	1,004	985	+18.79	+1.91%	9	55,229	0.8%	297.2	2.7%	25.4x	0.4x	ISLAMIBANK	77,924	2.1%	101.5	16.7x	1.1x
Engineering	2,549	2,486	+63.15	+2.54%	42	287,583	4.0%	574.7	5.2%	13.6x	0.9x	LHB	70,728	1.9%	107.4	18.9x	3.7x
Food & Allied	15,529	15,306	+222.70	+1.45%	21	284,133	4.0%	838.0	7.6%	21.5x	4.5x	RENATA	58,713	1.6%	76.7	20.9x	1.7x
IT	1,879	1,828	+51.29	+2.81%	11	24,785	0.3%	272.9	2.5%	20.9x	1.6x	BXPHERMA	52,820	1.4%	181.5	8.3x	1.1x
Textile	1,131	1,113	+17.53	+1.57%	58	117,759	1.6%	1,494.0	13.5%	NM	0.8x	UNILEVERCL	48,161	1.3%	1.3	75.8x	26.4x
Paper & Printing	4,424	4,360	+64.12	+1.47%	6	19,989	0.3%	187.4	1.7%	NM	0.9x	DUTCHBANGL	44,855	1.2%	29.2	11.9x	0.9x
Tannery	2,022	2,018	+4.09	+0.20%	6	22,533	0.3%	49.7	0.5%	NM	1.7x	ICB	43,103	1.2%	12.1	NM	1.0x
Jute	11,894	11,671	+223.23	+1.91%	3	2,618	0.0%	15.4	0.1%	NM	NM	EBL	42,927	1.1%	109.8	6.1x	1.0x
Ceramics	411	399	+11.74	+2.94%	5	18,428	0.3%	94.6	0.9%	NM	1.2x	PUBALIBANK	41,255	1.1%	89.6	5.6x	0.7x
Miscellaneous	4,171	4,149	+22.55	+0.54%	15	226,526	3.2%	549.0	5.0%	86.4x	1.8x	CITYBANK	38,791	1.0%	363.5	3.6x	0.7x
Corporate Bond**	15,020	14,972	+47.56	+0.32%	16	33,160	0.5%	1.1	0.0%	NM	NM	OLYMPIC	34,569	0.9%	214.7	18.7x	2.9x
Treasury Bond**	2,167	2,129	+38.05	+1.79%	235	3,426,569	47.7%	0.8	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
STANDBANKL	7.7	+10.0%	85.9	10.2x	0.5x	SQURPHARMA	108,958	7.7%	8.8x	1.5x	UTTARABANK	22.7	+4.1%	445.1	NM	0.8x
BSCPLC	149.8	+10.0%	170.7	21.4x	1.7x	ISLAMIBANK	74,730	5.3%	16.7x	1.1x	BSC	118.3	+3.1%	389.9	6.0x	1.2x
BSRMLTD	91.2	+9.1%	48.3	5.3x	0.6x	BEXIMCO	69,463	4.9%	NM	1.3x	CITYBANK	25.5	-1.2%	363.5	3.6x	0.7x
MALEKSPIN	29.0	+9.0%	250.3	3.9x	0.5x	BATBC	50,233	3.6%	13.3x	3.1x	SQURPHARMA	232.2	+1.0%	286.0	8.8x	1.5x
REGENTTEX	3.8	+8.6%	0.7	NM	0.1x	WALTONHIL	46,773	3.3%	10.8x	1.2x	MALEKSPIN	29.0	+9.0%	250.3	3.9x	0.5x
LANKABAFIN	18.2	+8.33%	132.3	18.8x	1.0x	BRACBANK	46,489	3.3%	9.8x	1.6x	JAMUNABANK	21.2	-	249.1	7.3x	0.9x
MIRACLEIND	29.5	+8.1%	5.7	NM	2x	GP	44,708	3.2%	14.6x	7.6x	OLYMPIC	172.9	+3.6%	214.7	18.7x	2.9x
UNITEDINS	40.6	+8.0%	22.6	14.4x	1.4x	RENATA	32,968	2.3%	20.9x	1.7x	MJLBD	103.9	+7.8%	186.8	10.1x	2.0x
MJLBD	103.9	+7.8%	186.8	10.1x	2.0x	BXPHARMA	23,409	1.7%	8.3x	1.1x	BXPHARMA	118.4	+4.6%	181.5	8.3x	1.1x
UCB	11.6	+7.4%	73.5	4.6x	0.5x	PUBALIBANK	22,905	1.6%	5.6x	0.7x	BSCPLC	149.8	+10.0%	170.7	21.4x	1.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.6x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEMLLECMF	8.0	-9.1%	43.1	NM	0.9x	LHB	20,953	1.5%	18.9x	3.7x	TRUSTBANK	23.0	22.0	25.0	4,391	98.38
JANATAINS	25.5	-6.6%	6.3	21.3x	2x	OLYMPIC	20,496	1.5%	18.7x	2.9x	QGBALLPEN	239.0	239.0	1.0	200	47.80
HAMI	97.2	-4.0%	5.2	NM	10.7x	ALARABANK	18,282	1.3%	41.7x	0.9x	BRACBANK	77.5	71.9	2.0	418	30.09
ASIAINS	26.8	-3.6%	2.6	12.8x	0.9x	BEACONPHAR	17,838	1.3%	30.8x	4.1x	BSC	115.7	104.0	4.0	215	24.77
ACTIVEFINE	8.5	-3.4%	4.2	NM	0.4x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	DOMINAGE	13.0	12.1	8.0	1,850	23.64
PREMIERLEA	2.9	-3.3%	0.1	NM	NM	ROBI	14,876	1.1%	17.1x	2.3x	SIMTEX	18.4	16.7	6.0	1,012	17.87
KPPL	17.4	-3.3%	11.5	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	JAMUNABANK	21.9	21.9	1.0	750	16.43
DSHGARME	116.7	-3.2%	31.7	NM	6.3x	NBL	13,055	0.9%	NM	NM	MARICO	2,800.0	2,800.0	1.0	5	14.00
PROVATIINS	33.9	-3.1%	16.9	18.3x	1.5x	BSRMLTD	12,852	0.9%	5.3x	0.6x	TILIL	52.5	52.5	5.0	195	10.24
1STPRIMFMF	21.6	-3.1%	27.0	NM	2.0x						UTTARABANK	22.2	20.0	3.0	293	6.06

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

** The base of the Bond Index starts at 100, starting from Jan 13, 2022

Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond Index starts at 100, starting from Jan 13, 2022.
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
TRUSTBANK	23.0	22.0	98.4	4,391	25
GQBALLPEN	239.0	239.0	47.8	200	1
BRACBANK	77.5	71.9	30.1	418	2
BSC	115.7	104.0	24.8	215	4
DOMINAGE	13.0	12.1	23.6	1,850	8
SIMTEX	18.4	16.7	17.9	1,012	6
JAMUNABANK	21.9	21.9	16.4	750	1
MARICO	2,800.0	2,800.0	14.0	5	1
TILIL	52.5	52.5	10.2	195	5
UTTARABANK	22.2	20.0	6.1	293	3
OLYMPIC	166.9	166.9	5.0	30	2
AMBEEPHA	868.0	868.0	4.3	5	1
DHAKABANK	12.9	12.9	4.2	326	1
BANKASIA	19.5	19.5	3.6	185	1
BSCPLC	140.0	140.0	3.5	25	1
BSRMLTD	83.6	83.6	3.3	40	1
SEMLLECMF	9.6	9.6	2.9	303	2
CITYGENINS	49.1	48.0	2.5	51	2
ACI	192.0	192.0	2.4	13	2
MTB	14.6	14.6	2.0	134	1
SHEPHERD	18.0	18.0	1.6	89	1
SONALIANS	192.0	192.0	1.6	8	1
Total			337.9		90

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PRIMELIFE		0.0%	0.0%	Record Date	4-Aug-25
DHAKABANK		5.0%	0.0%	Record Date	7-Aug-25
FASFIN		0.0%	0.0%	Record Date	10-Aug-25
GP		0.0%	110.0%	Record Date	13-Aug-25
NATLIFEINS		0.0%	35.0%	Record Date	17-Aug-25
PRAGATILIF		0.0%	15.0%	Record Date	19-Aug-25
MARICO		0.0%	600.0%	Record Date	21-Aug-25
CAPITECGBF		0.0%	3.3%	Record Date	24-Aug-25
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-25
AGRANINS		6.0%	6.0%	Record Date	ill be notified lat
TOSRIFA		2.0%	0.0%	Record Date	ill be notified lat
MIRACLEIND		0.0%	0.0%	Record Date	ill be notified lat
ORIONINFU		0.0%	0.0%	Record Date	ill be notified lat
LIBRAINFU		50.0%	0.0%	Record Date	ill be notified lat

Important DSE News

PHENIXINS

(Q2 Un-audited): EPS was Tk. 0.29 for April-June 2025 as against Tk. 0.15 for April-June 2024; EPS was Tk. 0.68 for January-June 2025 as against Tk. 0.63 for January-June 2024. NOCFPS was Tk. (0.97) for January-June 2025 as against Tk. 0.11 for January-June 2024. NAV per share was Tk. 33.13 as on June 30, 2025 and Tk. 33.83 as on June 30, 2024. EPS increased due to decreased in reinsurance cost, management expenses & claims. NOCFPS is lower due to collection from premium & other income decreased.

MERCINS

(Q2 Un-audited): EPS was Tk. 0.11 for April-June 2025 as against Tk. 0.10 for April-June 2024; EPS was Tk. 0.53 for January-June 2025 as against Tk. 0.55 for January-June 2024. NOCFPS was Tk. 0.12 for January-June 2025 as against Tk. 0.13 for January-June 2024. NAV per share was Tk. 19.58 as on June 30, 2025 and Tk. 19.24 as on December 31, 2024.

IDLIC

(Q2 Un-audited): Consolidated EPS was Tk. 1.33 for April-June 2025 as against Tk. 0.91 for April-June 2024; Consolidated EPS was Tk. 2.49 for January-June 2025 as against Tk. 1.72 for January-June 2024. Consolidated NOCFPS was Tk. 20.31 for January-June 2025 as against Tk. 6.49 for January-June 2024. Consolidated NAV per share was Tk. 47.02 as on June 30, 2025 and Tk. 45.96 as on December 31, 2024.

ABBANK

(Q2 Un-audited): Consolidated EPS was Tk. (16.78) for April-June 2025 as against Tk. 0.04 for April-June 2024; Consolidated EPS was Tk. (19.63) for January-June 2025 as against Tk. 0.16 for January-June 2024. Consolidated NOCFPS was Tk. 3.99 for January-June 2025 as against Tk. (28.12) for January-June 2024. Consolidated NAV per share was Tk. (12.33) as on June 30, 2025 and Tk. 28.88 as on June 30, 2024. EPS has decreased due to mainly decrease of net interest income. NOCFPS has increased mainly due to the increase of both customer deposits and deposit from Banks.

TRUSTBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.15 for April-June 2025 as against Tk. 1.17 for April-June 2024; Consolidated EPS was Tk. 1.46 for January-June 2025 as against Tk. 1.53 for January-June 2024. Consolidated NOCFPS was Tk. 28.41 for January-June 2025 as against Tk. 22.35 for January-June 2024. Consolidated NAV per share was Tk. 29.07 as on June 30, 2025 and Tk. 26.49 as on June 30, 2024.

MEGHNALIFE

(Q2 Un-audited): As per life revenue account of the company for April to June, 2025, excess of total income over total expenses including claims (surplus) was BDT 64.48 million as against excess of total expenses including claims over total income (deficit) of BDT 805.66 million in the corresponding previous period of 2024. Balance of Life Insurance Fund was BDT 15,337.49 million as on June 30, 2025 as against BDT 14,970.38 million as on June 30, 2024 resulting a net increase of BDT 367.11 million. NOCFPS was Tk. (15.77) as on June 30, 2025 as against Tk. (24.77) as on June 30, 2024.

DGIC

(Q2 Un-audited): EPS was Tk. 0.04 for April-June 2025 as against Tk. 0.30 for April-June 2024; EPS was Tk. 0.09 for January-June 2025 as against Tk. 0.54 for January-June 2024. NOCFPS was Tk. (0.14) for January-June 2025 as against Tk. (0.22) for January-June 2024. NAV per share was Tk. 11.38 as on June 30, 2025 and Tk. 11.30 as on December 31, 2024.

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UNITEDINS

(Q2 Un-audited): EPS was Tk. 1.21 for April-June 2025 as against Tk. 0.73 for April-June 2024; EPS was Tk. 1.66 for January-June 2025 as against Tk. 1.10 for January-June 2024. NOCFPS was Tk. 0.93 for January-June 2025 as against Tk. (0.38) for January-June 2024. NAV per share was Tk. 28.89 as on June 30, 2025 and Tk. 30.59 as on December 31, 2024. Reasons for deviation: EPS has increased due to higher underwriting profit and investment income. NOCFPS has increased due to higher collection of premium. NAVPS has decreased due to decrease in fair/market value of shares of United Finance Ltd. during the period.

DHAKAINS

(Q2 Un-audited): EPS was Tk. 0.73 for April-June 2025 as against Tk. 0.75 for April-June 2024; EPS was Tk. 1.23 for January-June 2025 as against Tk. 1.50 for January-June 2024. NOCFPS was Tk. (0.54) for January-June 2025 as against Tk. 0.75 for January-June 2024. NAV per share (with revaluation) was Tk. 36.94 as on June 30, 2025 and Tk. 35.65 as on December 31, 2024. NAV per share (without revaluation) was Tk. 26.31 as on June 30, 2025 and Tk. 25.02 as on December 31, 2024.

STANDBANKL

(Q2 Un-audited): Consolidated EPS was Tk. 0.18 for April-June 2025 as against Tk. 0.17 for April-June 2024; Consolidated EPS was Tk. 0.34 for January-June 2025 as against Tk. 0.31 for January-June 2024; Consolidated NOCFPS was Tk. 12.24 for January-June 2025 as against Tk. 8.72 for January-June 2024. Consolidated NAV per share was Tk. 16.96 as on June 30, 2025 and Tk. 16.58 as on June 30, 2024. NOCFPS has significantly increased as of 30 June 2025 compared to the same period in the previous year (30 June 2024), due to the following reasons: Cash inflow increased significantly due to a rise in deposits amounting to Tk. 600.02 crore as of 30 June 2025, compared to the position as of 31 December 2024. Cash inflow also increased substantially due to higher placements from banks, which rose by Tk. 1,162.01 crore as of 30 June 2025 compared to 31 December 2024. Investment income increased by Tk. 127.57 crore as of 30 June 2025 compared to 30 June 2024, contributing to higher cash inflows. Income from investments in shares and securities rose significantly by Tk. 75.56 crore as of 30 June 2025 compared to 30 June 2024. Operating expenses decreased by Tk. 7.07 crore as of 30 June 2025 compared to 30 June 2024, resulting in higher net cash flow.

SSSTEEL

The company has informed that the Board of Directors has approved the appointment of Mr. Md. Abul Kalam as the Company Secretary (Acting) of the company with effect from July 31, 2025.

PIONEERINS

Mr. A.K.M. Rahmatullah, a Sponsor of the company, has further informed that he has completed his transfer of 2,638,041 shares of the Company to his daughter Mrs. Munsura Rahmatullah by way of gift outside the trading system of the Exchange as per news disseminated by DSE on 30.07.2025.

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