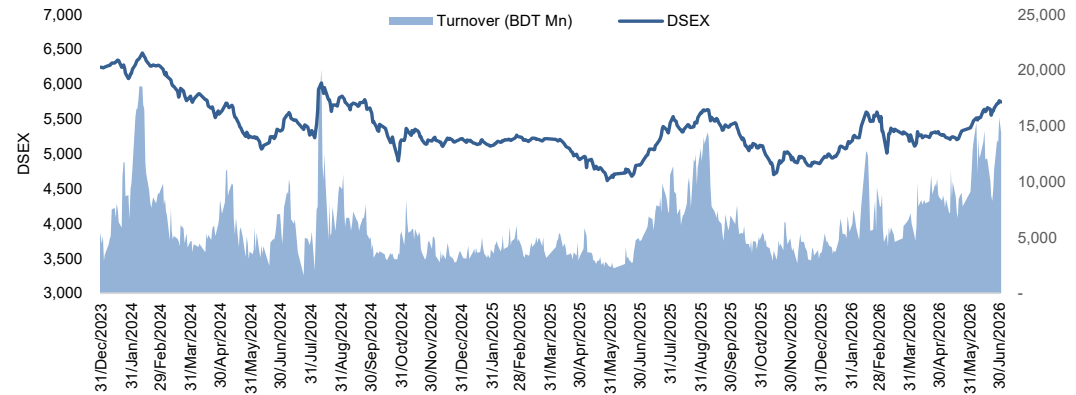


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.33%) lost 18.97 points and closed at 5,743.86. The blue-chip index DS30 (-0.75%), the Shariah-based index DSES (+0.07%), and the large-cap index CDSET (-0.79%) closed at 2,162.01, 1,168.93, and 1,139.56 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.37% followed by Food & Allied (-0.87%), Telecommunication (-0.79%), Engineering (-0.65%), Pharmaceutical (-0.07%), Fuel & Power (+0.15%), and NBF1 (+1.01%), respectively. Block trades contributed 2.4% of the overall market turnover. Malek Spinning Mills PLC. (+9.3%) was the most traded share with a turnover of BDT 670 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,743.86	5,762.83	-18.97	-0.33%	+18.1%
DS30	2,162.01	2,178.38	-16.37	-0.75%	+16.6%
DSES	1,168.93	1,168.13	+0.80	+0.07%	+16.8%
CDSET	1,139.56	1,148.64	-9.08	-0.79%	+13.4%

	Advanced	Declined	Unchanged	Total
All Category	163	185	46	394
A Category (Equity)	95	82	21	198
B Category (Equity)	31	38	6	75
N Category (Equity)	0	0	1	1
Z Category (Equity)	37	65	18	120
Mutual Funds	6	13	15	34
Corporate Bonds	3	0	1	4
Treasury Bonds	0	3	0	3

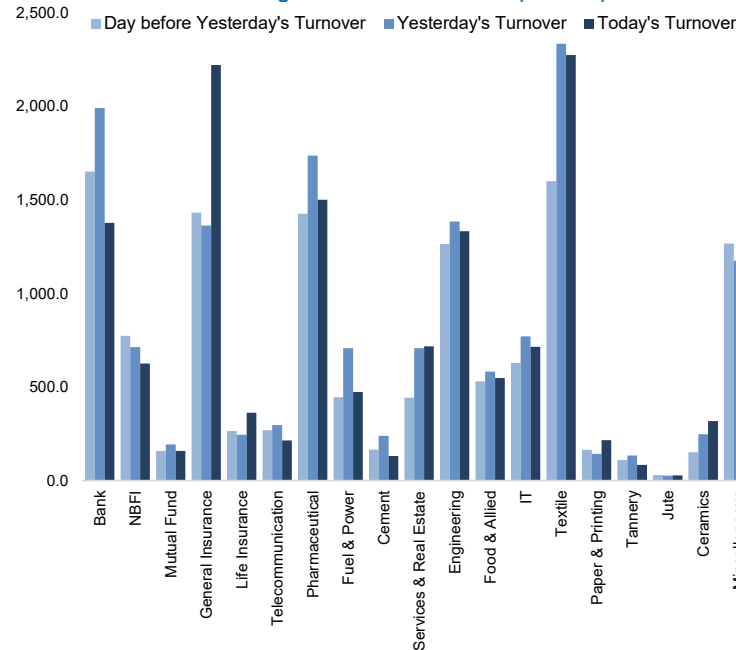
\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,977,391	6,986,923	-0.1%
	Mn USD	56,754	56,832	
Turnover	Mn BDT	14,395	15,737	-8.5%
	Mn USD	117	128	
Volume	Mn Shares	422	475	-11.1%
No. of Trade		327,405	314,848	+4.0%

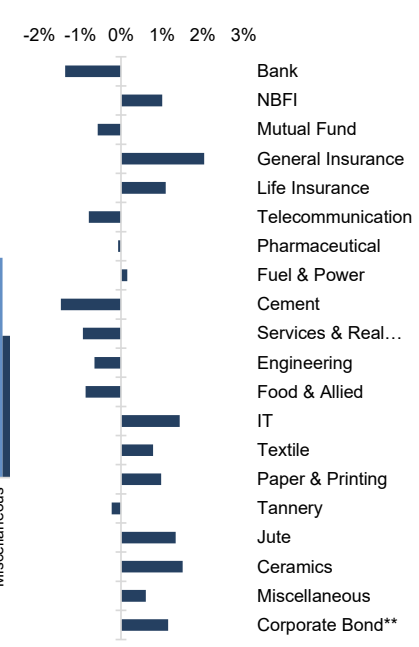
\* Average Interbank Exchange Rate is BDT 122.94 as of Jul 02, 2026

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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



**Market PE** 13.7x  
**Market PB** 1.7x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBF1s and Banks

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	1,548	1,569	-21.47	-1.37%	36	737,633	10.6%	1,376.1	9.8%	6.9x	0.7x	GP	348,782	9.6%	55.8	11.7x	5.6x
NBFI	1,161	1,149	+11.59	+1.01%	23	110,396	1.6%	624.7	4.4%	NM	1.2x	SQURPHARMA	196,438	5.4%	208.3	7.6x	1.3x
Mutual Fund	557	560	-3.21	-0.57%	36	26,813	0.4%	159.2	1.1%	NM	0.5x	ROBI	168,661	4.7%	134.6	16.2x	2.3x
General Insurance	4,368	4,281	+87.23	+2.04%	43	123,409	1.8%	2,219.2	15.8%	19.9x	1.7x	BRACBANK	146,074	4.0%	604.7	7.3x	1.3x
Life Insurance	1,948	1,927	+21.14	+1.10%	15	54,912	0.8%	362.7	2.6%	NM	NM	WALTONHIL	131,189	3.6%	24.8	13.1x	1.1x
Telecommunication	4,709	4,746	-37.38	-0.79%	3	546,416	7.8%	213.9	1.5%	12.7x	3.6x	BATBC	117,450	3.2%	38.2	24.7x	2.1x
Pharmaceutical	3,194	3,196	-2.19	-0.07%	34	602,905	8.6%	1,500.4	10.7%	11.0x	1.5x	MARICO	86,609	2.4%	19.4	7.5x	29.9x
Fuel & Power	1,152	1,150	+1.77	+0.15%	23	304,113	4.4%	472.4	3.4%	9.8x	0.6x	UPGDCL	72,462	2.0%	9.1	7.8x	1.5x
Cement	2,111	2,143	-31.60	-1.47%	7	99,320	1.4%	131.0	0.9%	23.0x	2.2x	BERGERPBL	69,971	1.9%	21.0	18.8x	3.6x
Services & Real Estate	1,143	1,154	-10.75	-0.93%	9	62,187	0.9%	717.7	5.1%	25.3x	0.5x	BXPHERMA	64,820	1.8%	299.7	7.5x	1.1x
Engineering	2,754	2,772	-18.05	-0.65%	42	308,697	4.4%	1,332.3	9.5%	17.9x	0.9x	PUBALIBANK	56,534	1.6%	11.9	5.0x	0.8x
Food & Allied	12,476	12,585	-109.19	-0.87%	21	227,753	3.3%	548.3	3.9%	38.4x	3.4x	CITYBANK	54,756	1.5%	242.8	3.7x	0.8x
IT	2,590	2,553	+36.70	+1.44%	11	34,295	0.5%	714.7	5.1%	38.7x	2.1x	RENATA	52,347	1.4%	24.4	19.2x	1.4x
Textile	1,355	1,344	+10.59	+0.79%	58	140,949	2.0%	2,273.3	16.2%	NM	1.0x	ISLAMIBANK	50,715	1.4%	7.1	NM	0.7x
Paper & Printing	4,844	4,797	+47.04	+0.98%	6	22,688	0.3%	216.1	1.5%	NM	1.5x	DUTCHBANGL	44,662	1.2%	17.4	3.9x	0.7x
Tannery	2,113	2,118	-4.81	-0.23%	6	24,540	0.4%	83.2	0.6%	NM	1.5x	EBL	40,599	1.1%	63.5	4.7x	0.8x
Jute	12,768	12,599	+168.74	+1.34%	3	2,785	0.0%	27.3	0.2%	NM	1.7x	UNILEVERCL	39,884	1.1%	1.5	51.3x	16.9x
Ceramics	505	498	+7.50	+1.51%	5	22,821	0.3%	318.0	2.3%	NM	1.5x	ICB	39,634	1.1%	15.9	NM	1.5x
Miscellaneous	2,636	2,620	+15.89	+0.61%	15	143,119	2.0%	756.8	5.4%	56.4x	1.1x	PRIMEBANK	36,559	1.0%	41.2	4.0x	0.8x
Corporate Bond**	19,149	18,931	+218.06	+1.15%	16	42,366	0.6%	1.3	0.0%	NM	NM	POWERGRID	35,913	1.0%	8.8	8.9x	0.3x
Treasury Bond**	2,177	2,174	+2.41	+0.11%	232	3,343,552	47.9%	0.9	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
PLFSL	1.4	+16.7%	7.5	NM	NM	SQURPHARMA	109,710	7.2%	7.6x	1.3x	MALEKSPIN	40.1	+9.3%	670.1	7.1x	0.6x
USMANIAGL	50.6	+10.0%	9.6	NM	0.8x	BRACBANK	78,632	5.2%	7.3x	1.3x	BRACBANK	63.8	-2.6%	604.7	7.3x	1.3x
PRIMEFIN	3.3	+10.0%	1.8	NM	NM	ISLAMIBANK	50,623	3.3%	NM	0.7x	SAPORTL	50.5	-4.4%	384.7	23.8x	1.4x
FIRSTFIN	4.4	+10.0%	1.1	NM	NM	BXPHERMA	45,290	3.0%	7.5x	1.1x	BEXIMCO	30.5	+4.1%	332.5	NM	0.4x
SONARBAINS	48.9	+9.9%	107.8	NM	2.5x	WALTONHIL	43,174	2.8%	13.1x	1.1x	BXPHERMA	145.3	+3.3%	299.7	7.5x	1.1x
SAMORITA	90.1	+9.88%	64.7	NM	1.9x	PUBALIBANK	38,517	2.5%	5.0x	0.8x	IPDC	33.5	+1.8%	273.8	29.7x	2.0x
BIFC	4.6	+9.5%	0.4	NM	NM	CITYBANK	38,127	2.5%	3.7x	0.8x	CITYBANK	31.3	-2.2%	242.8	3.7x	0.8x
MALEKSPIN	40.1	+9.3%	670.1	7.1x	0.6x	GP	34,878	2.3%	11.7x	5.6x	ITC	49.7	+2.7%	241.9	14.9x	2.0x
GSPFINANCE	3.7	+8.8%	0.6	NM	NM	BATBC	31,066	2.0%	24.7x	2.1x	SQURPHARMA	221.6	-1.1%	208.3	7.6x	1.3x
PREMIERLEA	2.5	+8.7%	1.7	NM	NM	EBL	27,835	1.8%	4.7x	0.8x	SONARGAON	96.2	-0.5%	199.1	NM	5.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
REGENTTEX	6.1	-6.2%	2.0	NM	0.2x	DOMINAGE	80.3	75.0	16.0	1,135	87.93
NFML	22.0	-5.2%	144.4	NM	2x	MARICO	2,720.0	2,720.0	1.0	20	54.40
AZIZPIPES	75.5	-4.5%	22.9	NM	1.6x	ASIATICLAB	129.0	115.0	3.0	389	50.10
1STPRIMFMF	23.3	-4.5%	22.9	NM	1.6x	MEGHNAPET	75.0	74.0	8.0	344	25.75
HFL	15.0	-4.5%	1.0	NM	0.5x	APEXSPINN	375.0	370.0	5.0	50	18.62
BDTHAIFOOD	24.0	-4.4%	89.3	NM	2.1x	NCCBANK	17.6	16.0	3.0	970	15.64
SAPORTL	50.5	-4.4%	384.7	23.8x	1.4x	MALEKSPIN	37.0	35.0	4.0	265	9.65
RAHIMTEXT	215.6	-4.3%	32.1	84.2x	7.8x	CRYSTALINS	78.0	78.0	1.0	119	9.32
ABBANK	4.8	-4.0%	4.5	NM	NM	FINEFOODS	512.0	512.0	1.0	13	6.70
APEXSPINN	383.7	-3.9%	67.4	NM	4.6x	BXPHERMA	140.6	140.6	4.0	47	6.54

\* Bank and NBFI sector PE calculation methodology has been modified.  
 \*\* 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
DOMINAGE	80.3	75.0	87.9	1,135	16
MARICO	2,720.0	2,720.0	54.4	20	1
ASIATICLAB	129.0	115.0	50.1	389	3
MEGHNA PET	75.0	74.0	25.7	344	8
APEXSPINN	375.0	370.0	18.6	50	5
NCCBANK	17.6	16.0	15.6	970	3
MALEKSPIN	37.0	35.0	9.6	265	4
CRYSTALINS	78.0	78.0	9.3	119	1
FINEFOODS	512.0	512.0	6.7	13	1
BXPHERMA	140.6	140.6	6.5	47	4
GLOBALINS	39.5	35.0	6.3	163	5
PREMIERCEM	49.9	49.9	5.0	100	1
MERCINS	44.6	44.6	4.5	100	2
PRIMEINSUR	44.0	42.3	3.6	83	2
SIPLC	105.0	99.9	3.0	30	2
SONARBAINS	45.3	45.0	3.0	66	2
UTTARABANK	19.8	19.8	3.0	150	1
KARNAPHULI	37.6	37.6	2.8	75	1
STANDARINS	55.0	54.4	2.4	44	2
SHYAMPSUG	250.8	250.8	2.3	9	3
TAKAFULINS	44.6	44.6	2.1	48	1
PADMAOIL	188.0	188.0	2.0	11	1
<b>Total</b>			<b>346.0</b>		<b>94</b>

**Important DSE News**

**PLFSL**

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 17.08.2026, Time: 10:00 AM, Venue: Hybrid system (Hotel Inter Continental, 1, Minto Road, Dhaka-1000). Record Date: 26.07.2026. The Company has also reported EPS of Tk. (12.81), NAV per share of Tk. (155.15) and NOCFPS of Tk. (0.69) for the year ended December 31, 2025, as against Tk. (14.95), Tk. (149.50) and Tk. (0.22) respectively for the year ended December 31, 2024.

**(Q1 Un-audited):** EPS was Tk. (3.39) for January-March 2026 as against Tk. (3.45) for January-March 2025. NOCFPS was Tk. 0.16 for January-March 2026 as against Tk. (0.26) for January-March 2025. NAV per share was Tk. (158.04) as on March 31, 2026, and Tk. (152.96) as on March 31, 2025.

**BAYLEASING**

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 27.09.2026, Time: 11:00 AM, Venue: Hybrid system (DSE Multipurpose Hall, DSE Tower, Nikunja-2, Dhaka). Record Date: 10.08.2026. The Company has also reported Consolidated EPS of Tk. (6.87), Consolidated NAV per share of Tk. (19.65) and Consolidated NOCFPS of Tk. (2.22) for the year ended December 31, 2025, as against Tk. (31.16), Tk. (25.20) and Tk. 0.48 respectively for the year ended December 31, 2024.

**(Q1 Un-audited):** Consolidated EPS was Tk. (1.40) for January-March 2026 as against Tk. (1.77) for January-March 2025. Consolidated NOCFPS was Tk. (1.26) for January-March 2026 as against Tk. (0.95) for January-March 2025. Consolidated NAV per share was Tk. (21.05) as on March 31, 2026 and Tk. (19.65) as on December 31, 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SUNLIFEINS		0.0%	0.0%	Record Date	5-Jul-26
DGIC		0.0%	2.0%	Record Date	7-Jul-26
BERGERPBL		0.0%	525.0%	Record Date	7-Jul-26
PRAGATILIF		10.0%	15.0%	Record Date	14-Jul-26
PRIMELIFE		0.0%	0.3%	Record Date	16-Jul-26
GLOBALINS		0.0%	10.0%	Record Date	20-Jul-26
ISLAMIINS		0.0%	16.0%	Record Date	20-Jul-26
POPULARLIF		0.0%	20.0%	Record Date	20-Jul-26
CLICL		0.0%	4.0%	Record Date	22-Jul-26
FIRSTFIN		0.0%	0.0%	Record Date	22-Jul-26
SICL		0.0%	10.0%	Record Date	23-Jul-26
NHFIL		0.0%	10.0%	Record Date	23-Jul-26
MEGHNALIFE		0.0%	15.0%	Record Date	23-Jul-26
PHOENIXFIN		0.0%	0.0%	Record Date	23-Jul-26
PLFSL		0.0%	0.0%	Record Date	26-Jul-26
BIFC		0.0%	0.0%	Record Date	30-Jul-26
FASFIN		0.0%	0.0%	Record Date	30-Jul-26

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