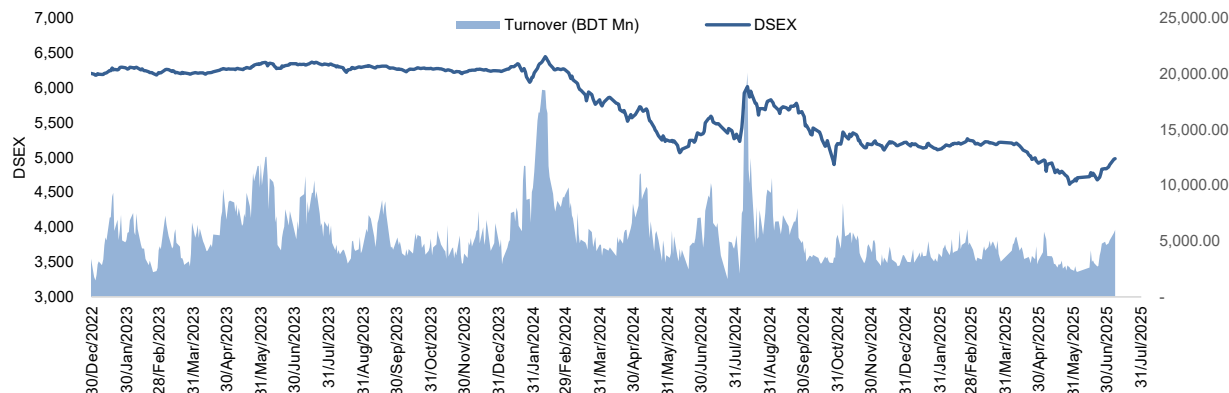


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.11%) gained 5.48 points and closed at 4,981.64. The blue-chip index DS30 (+0.13%), the Shariah-based index DSES (+0.24%), and the large-cap index CDSET (-0.13%) closed at 1,875.39, 1,083.76, and 1,017.04 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.48%, followed by Engineering (+0.09%), Food & Allied (+0.01%), Fuel & Power (-0.18%), Telecommunication (-0.26%), Bank (-0.47%), and NBFI (-0.68%), respectively. Block trades contributed 6.0% of the overall market turnover. Asiatic Laboratories Limited (+1.5%) was the most traded share with a turnover of BDT 164 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,981.64	4,976.16	+5.48	+0.11%	-4.5%
DS30	1,875.39	1,873.00	+2.38	+0.13%	-3.3%
DSES	1,083.76	1,081.19	+2.57	+0.24%	-7.3%
CDSET	1,017.04	1,018.35	-1.31	-0.13%	-4.6%

	Advanced	Declined	Unchanged	Total
All Category	158	191	49	398
A Category (Equity)	94	101	23	218
B Category (Equity)	35	42	6	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	48	20	97
Mutual Funds	3	24	9	36
Corporate Bonds	1	0	0	1
Treasury Bonds	1	3	0	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,686,997	6,680,614	+0.1%
	Mn USD	54,631	54,579	
Turnover	Mn BDT	6,018	5,735	+4.9%
	Mn USD	49	47	
Volume	Mn Shares	253	280	-9.7%
No. of Trade		182,387	169,260	+7.8%

\* Average Interbank Exchange Rate is BDT 122.40 as of Jul 08, 2025

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Figure: Sectorial Turnover (BDT Mn)

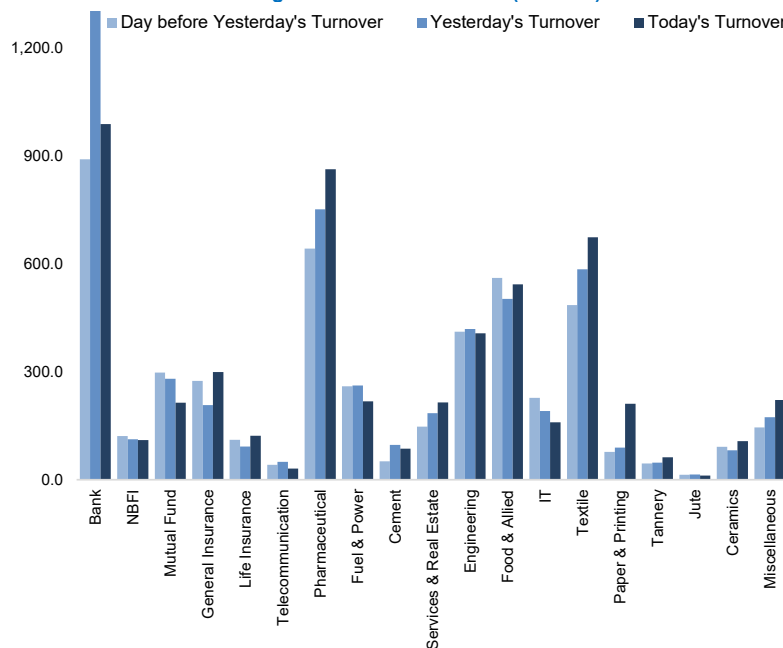
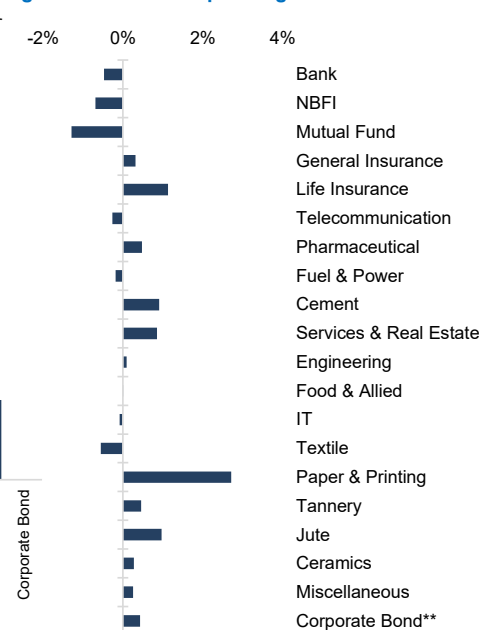


Figure: Sectorial Mcap Change



Market PE 13.4x

Market PB 1.1x

\* 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	1,438	1,445	-6.79	-0.47%	36	680,532	10.2%	987.5	17.5%	19.7x	0.7x	GP	403,335	11.9%	13.4	13.8x	5.7x
NBFI	985	992	-6.79	-0.68%	23	93,884	1.4%	110.3	1.9%	NM	NM	SQURPHARMA	185,357	5.5%	44.4	7.9x	1.4x
Mutual Fund	640	649	-8.36	-1.29%	37	29,435	0.4%	213.7	3.8%	NM	0.6x	BATBC	151,200	4.5%	28.1	9.1x	2.9x
General Insurance	2,517	2,509	+7.85	+0.31%	43	71,821	1.1%	299.4	5.3%	12.1x	1.1x	ROBI	129,901	3.8%	15.1	18.0x	1.9x
Life Insurance	1,602	1,584	+17.94	+1.13%	15	42,603	0.6%	122.3	2.2%	NM	NM	WALTONHIL	125,746	3.7%	4.7	9.7x	1.1x
Telecommunication	4,742	4,754	-12.47	-0.26%	3	556,035	8.3%	30.9	0.5%	14.7x	3.5x	BRACBANK	111,492	3.3%	141.5	8.2x	1.3x
Pharmaceutical	2,838	2,825	+13.51	+0.48%	34	538,054	8.0%	861.7	15.2%	12.4x	1.5x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,089	1,091	-2.00	-0.18%	23	288,412	4.3%	217.6	3.8%	18.2x	0.6x	MARICO	78,709	2.3%	10.6	13.3x	10.4x
Cement	1,829	1,812	+16.43	+0.91%	7	87,140	1.3%	86.5	1.5%	20.9x	1.9x	BERGERPBL	74,872	2.2%	12.9	21.0x	4.6x
Services & Real Estate	950	942	+8.03	+0.85%	9	52,232	0.8%	214.4	3.8%	24.0x	0.4x	ISLAMIBANK	71,001	2.1%	71.3	15.2x	1.0x
Engineering	2,319	2,317	+2.20	+0.09%	42	261,657	3.9%	406.2	7.2%	12.0x	0.8x	RENATA	56,144	1.7%	32.0	20.0x	1.6x
Food & Allied	14,328	14,327	+0.98	+0.01%	21	262,160	3.9%	542.1	9.6%	15.2x	4.2x	LHB	54,120	1.6%	11.0	15.1x	2.7x
IT	1,752	1,753	-1.37	-0.08%	11	23,109	0.3%	159.3	2.8%	19.4x	1.5x	UNILEVERCL	46,698	1.4%	0.2	80.3x	18.1x
Textile	1,026	1,032	-5.70	-0.55%	58	106,902	1.6%	673.4	11.9%	NM	0.7x	BXPHARMA	41,265	1.2%	54.1	6.4x	0.8x
Paper & Printing	4,097	3,989	+108.39	+2.72%	6	18,511	0.3%	210.7	3.7%	NM	0.9x	ICB	40,935	1.2%	15.5	NM	1.0x
Tannery	1,888	1,879	+8.64	+0.46%	6	21,035	0.3%	62.1	1.1%	64.7x	1.5x	DUTCHBANGL	39,828	1.2%	3.2	9.2x	0.8x
Jute	10,789	10,685	+103.76	+0.97%	3	2,375	0.0%	11.4	0.2%	NM	NM	EBL	38,619	1.1%	27.0	5.7x	0.8x
Ceramics	375	374	+1.03	+0.27%	5	16,825	0.3%	107.5	1.9%	NM	1.1x	PUBALIBANK	33,837	1.0%	7.0	4.3x	0.6x
Miscellaneous	4,023	4,013	+10.14	+0.25%	15	218,486	3.3%	221.0	3.9%	81.7x	1.7x	CITYBANK	31,946	0.9%	104.7	3.2x	0.7x
Corporate Bond**	15,045	14,981	+64.09	+0.43%	16	33,215	0.5%	0.4	0.0%	NM	NM	POWERGRID	31,435	0.9%	1.9	NM	0.2x
Treasury Bond**	2,049	2,044	+4.55	+0.22%	236	3,281,828	49.1%	117.2	2.1%	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
TAMIJTEX	117.1	+10.0%	23.4	17.3x	1.2x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	ASIATICLAB	41.3	+1.5%	164.2	17.1x	0.8x
RAHIMAFOOD	89.9	+9.4%	51.9	NM	9.8x	ISLAMIBANK	74,730	5.3%	15.2x	1.0x	MIDLANDBNK	28.9	-1.0%	150.1	22.7x	1.9x
REGENTTEX	3.6	+9.1%	1.5	NM	0.1x	BEXIMCO	69,463	4.9%	NM	1.3x	SEAPEARL	56.9	+7.0%	149.9	NM	3.4x
NAVANACNG	22.1	+8.9%	10.3	NM	0.7x	BATBC	50,233	3.6%	9.1x	2.9x	BRACBANK	56.0	-	141.5	8.2x	1.3x
FIRSTSBANK	4.5	+7.1%	41.6	NM	0.4x	WALTONHIL	46,773	3.3%	9.7x	1.1x	BEACHHATCH	49.1	+0.4%	116.3	10.5x	3.0x
APEXSPINN	96.5	+6.98%	9.2	25.9x	1.5x	BRACBANK	46,489	3.3%	8.2x	1.3x	AIL	50.9	+2.0%	114.3	18.8x	2.1x
SEAPEARL	56.9	+7.0%	149.9	NM	3x	GP	44,708	3.2%	13.8x	5.7x	ORIONINFU	323.1	+5.6%	112.9	NM	20.6x
KPCL	10.2	+6.3%	7.1	30.0x	0.5x	RENATA	32,968	2.3%	20.0x	1.6x	CITYBANK	21.0	-1.4%	104.7	3.2x	0.7x
TECHNODRUG	30.8	+6.2%	88.9	NM	1.0x	BXPHARMA	23,409	1.7%	6.4x	0.8x	LOVELLO	95.7	+3.7%	104.2	43.1x	7.6x
BDLAMPS	125.0	+6.1%	10.5	NM	2.8x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	KBPPWBIL	113.0	+4.7%	94.0	NM	9.4x
						CITYBANK	21,020	1.5%	3.2x	0.7x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	15.1x	2.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PREMIERLEA	2.9	-6.5%	0.1	NM	NM	OLYMPIC	20,496	1.5%	16.5x	2.5x	BRACBANK	56.0	52.5	4.0	3,595	200.99
BDWELDING	9.7	-5.8%	0.4	NM	1x	ALARABANK	18,282	1.3%	34.9x	0.8x	SEMLLECMF	14.4	12.7	3.0	3,065	43.03
1JANATAMF	3.4	-5.6%	11.7	NM	0.4x	BEACONPHAR	17,838	1.3%	30.2x	4.0x	ASIATICLAB	43.9	43.8	2.0	688	30.17
FAMILYTEX	2.2	-4.3%	0.3	NM	0.2x	PRIMEBANK	16,142	1.1%	3.5x	0.7x	RENATA	487.5	487.5	1.0	50	24.38
MBL1STMF	4.7	-4.1%	2.2	NM	0.5x	UTTARABANK	13,699	1.0%	NM	0.6x	BEACONPHAR	106.0	105.0	3.0	123	12.91
TUNGHAI	2.5	-3.8%	0.0	NM	NM	NBL	13,055	0.9%	NM	7.8x	MARICO	2,500.0	2,500.0	3.0	5	11.25
DBH1STMF	5.0	-3.8%	0.6	NM	0.6x	BSRMLTD	12,852	0.9%	4.6x	0.5x	NTLTUBES	86.0	85.1	3.0	98	8.40
PRIME1ICBA	5.1	-3.8%	0.5	NM	0.8x											
DSSL	10.3	-3.7%	44.3	35.5x	0.6x											
SHEPHERD	18.2	-3.7%	30.6	NM	1.3x											
						* 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
BRACBANK	56.0	52.5	201.0	3,595	4
SEMLLECMF	14.4	12.7	43.0	3,065	3
ASIATICLAB	43.9	43.8	30.2	688	2
RENATA	487.5	487.5	24.4	50	1
BEACONPHAR	106.0	105.0	12.9	123	3
MARICO	2,500.0	2,500.0	11.3	5	3
NLTUBES	86.0	85.1	8.4	98	3
PREMIERCEM	49.6	49.2	5.5	111	3
HAMI	109.0	109.0	3.1	29	2
BEXIMCO	120.1	99.2	2.5	24	4
PENINSULA	10.7	10.7	2.1	200	1
FINEFOODS	230.5	230.1	1.9	8	2
BDLAMPS	119.8	119.8	1.8	15	1
ORIONINFU	330.0	330.0	1.7	5	1
AL-HAJTEX	132.5	132.5	1.7	13	1
PTL	42.8	42.7	1.5	34	2
AIL	48.8	48.8	1.3	26	1
SHEPHERD	18.7	18.7	1.2	64	1
HAKKANIPUL	69.8	60.3	1.2	18	2
KBPPWBIL	100.0	100.0	1.0	10	1
JAMUNAOIL	188.0	188.0	1.0	5	1
UTTARABANK	22.7	22.7	0.9	41	1
<b>Total</b>			<b>362.1</b>		<b>47</b>

#### Important DSE News

##### GLOBALINS

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024 subject to approval in the 25th AGM and by the respective authorities. Date of AGM: 25.08.2025, Time: 11:00 AM, Venue: Through Hybrid System at Banquet Hall, "FARS Hotel & Resorts" 212, Shaheed Syed Nazrul Islam Sarani, Purana Paltan, Dhaka, with both physical presence and Digital Platform. The link to join the meeting will be notified later. Record Date: 30.07.2025. The Company has also reported Consolidated EPS of Tk. 1.58, Consolidated NAV per share of Tk. 14.54 and Consolidated NOCFPS of Tk. 0.26 for the year ended December 31, 2024 as against Tk. 1.38, Tk. 13.96 and Tk. 0.68 respectively for the year ended December 31, 2023. (end).

**(Q1 Un-audited):** EPS was Tk. 0.42 for January-March 2025 as against Tk. 0.35 for January-March 2024. NOCFPS was Tk. 0.64 for January-March 2025 as against Tk. 0.37 for January-March 2024. NAV per share was Tk. 14.96 as on March 31, 2025 and Tk. 14.31 as on March 31, 2024.

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EXIMBANK		0.0%	0.0%	Record Date	10-Jul-25
DHAKAINS		0.0%	10.0%	Record Date	10-Jul-25
UNIONINS		0.0%	10.0%	Record Date	15-Jul-25
RUPALIBANK		0.0%	0.0%	Record Date	15-Jul-25
BIFC		0.0%	0.0%	Record Date	15-Jul-25
TAKAFULINS		0.0%	10.0%	Record Date	16-Jul-25
DGIC		0.0%	1.0%	Record Date	17-Jul-25
IFIC		0.0%	0.0%	Record Date	17-Jul-25
FIRSTSBANK		0.0%	0.0%	Record Date	20-Jul-25
SOUTHEASTB		0.0%	0.0%	Record Date	20-Jul-25
NRBBANK		0.0%	0.0%	Record Date	21-Jul-25
SONARBAINS		0.0%	10.0%	Record Date	21-Jul-25
BAYLEASING		0.0%	0.0%	Record Date	21-Jul-25
FIRSTFIN		0.0%	0.0%	Record Date	22-Jul-25
MEGHNALIFE		0.0%	15.0%	Record Date	22-Jul-25

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