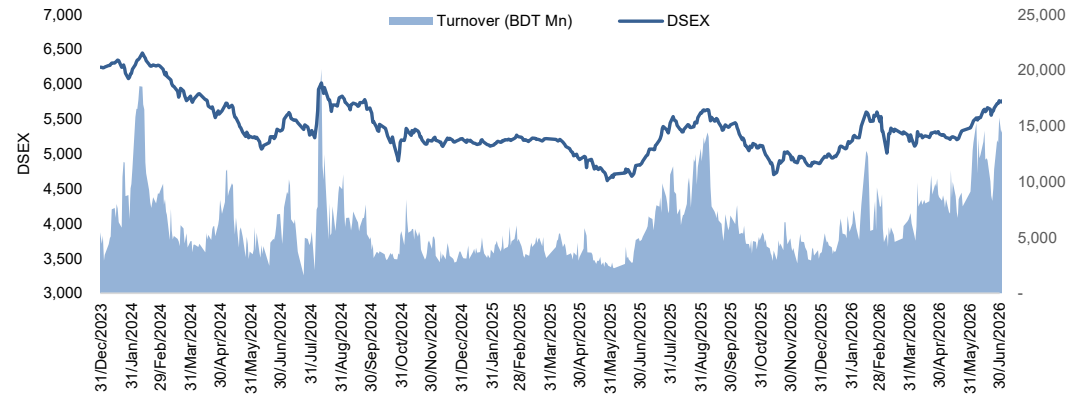


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.19%) lost 11 points and closed at 5,770.27. The blue-chip index DS30 (-0.58%), the Shariah-based index DSES (+0.15%), and the large-cap index CDSET (-0.52%) closed at 2,169.24, 1,186.63, and 1,140.91 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.34% followed by Bank (-0.92%), Fuel & Power (-0.20%), Telecommunication (-0.10%), Pharmaceutical (-0.07%), Food & Allied (-0.01%), and Engineering (+0.00%), respectively. Block trades contributed 2.5% of the overall market turnover. Malek Spinning Mills PLC. (+1.2%) was the most traded share with a turnover of BDT 339 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,770.27	5,781.27	-11.00	-0.19%	+18.6%
DS30	2,169.24	2,181.85	-12.61	-0.58%	+17.0%
DSES	1,186.63	1,184.88	+1.75	+0.15%	+18.6%
CDSET	1,140.91	1,146.82	-5.91	-0.52%	+13.5%

	Advanced	Declined	Unchanged	Total
All Category	145	192	56	393
A Category (Equity)	70	109	18	197
B Category (Equity)	30	41	3	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	45	42	35	122
Mutual Funds	11	12	11	34
Corporate Bonds	0	1	1	2
Treasury Bonds	0	4	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,002,359	7,004,338	-0.0%
	Mn USD	56,648	56,664	-0.0%
Turnover	Mn BDT	11,561	13,880	-16.7%
	Mn USD	94	112	-16.7%
Volume	Mn Shares	404	452	-10.7%
No. of Trade		278,569	316,993	-12.1%

* Average Interbank Exchange Rate is BDT 123.61 as of Jul 08, 2026

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Figure: Sectorial Turnover (BDT Mn)

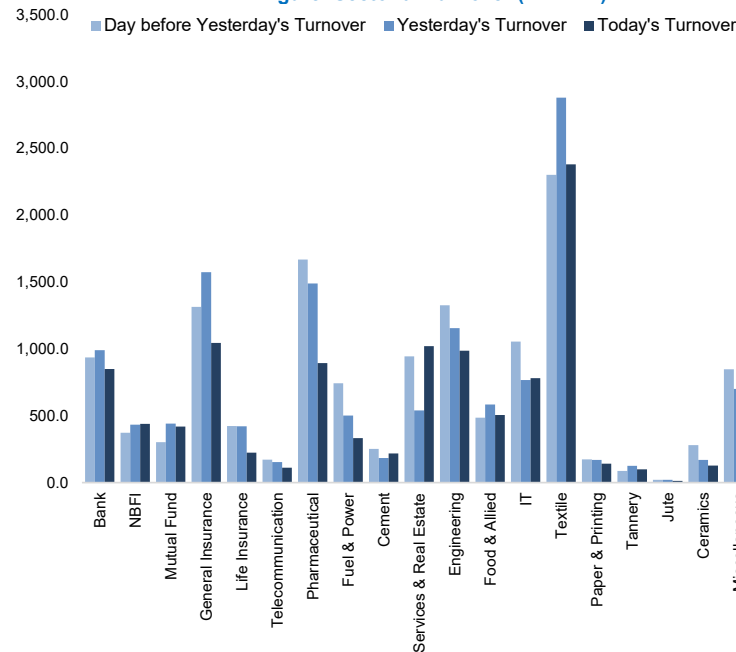
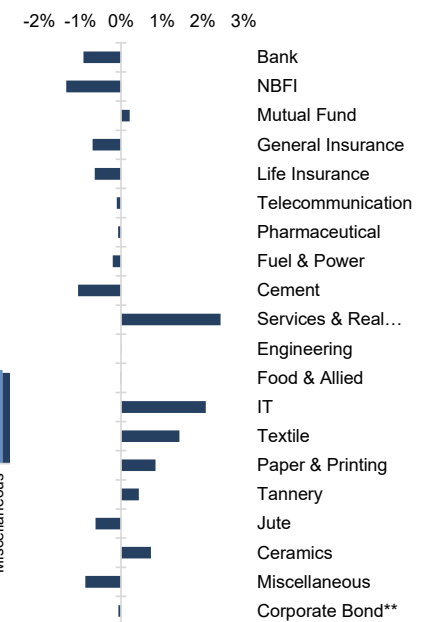


Figure: Sectorial Mcap Change



Market PE 13.8x
Market PB 1.7x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFIs 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	1,531	1,545	-14.18	-0.92%	36	729,623	10.4%	848.9	7.5%	6.8x	0.7x	GP	350,268	9.6%	30.9	11.7x	5.6x
NBFI	1,159	1,174	-15.71	-1.34%	23	110,168	1.6%	438.3	3.9%	NM	1.2x	SQURPHARMA	197,413	5.4%	54.6	7.6x	1.3x
Mutual Fund	592	591	+1.27	+0.22%	36	28,516	0.4%	419.4	3.7%	NM	0.5x	ROBI	168,661	4.6%	62.6	16.2x	2.3x
General Insurance	4,297	4,327	-29.99	-0.69%	43	121,399	1.7%	1,043.6	9.3%	19.5x	1.7x	BRACBANK	140,350	3.9%	302.3	7.0x	1.3x
Life Insurance	1,947	1,960	-12.55	-0.64%	15	54,895	0.8%	224.9	2.0%	NM	NM	WALTONHIL	132,855	3.7%	10.0	13.2x	1.1x
Telecommunication	4,723	4,728	-4.82	-0.10%	3	548,089	7.8%	110.6	1.0%	12.8x	3.6x	BATBC	117,720	3.2%	22.0	24.8x	2.1x
Pharmaceutical	3,229	3,231	-2.33	-0.07%	34	609,513	8.7%	894.5	7.9%	11.1x	1.5x	MARICO	85,926	2.4%	6.2	7.5x	29.6x
Fuel & Power	1,167	1,169	-2.40	-0.20%	23	308,032	4.4%	333.4	3.0%	9.9x	0.6x	UPGDCL	73,621	2.0%	6.6	7.9x	1.5x
Cement	2,129	2,152	-22.64	-1.05%	7	100,188	1.4%	217.8	1.9%	23.2x	2.2x	BXPHERMA	69,103	1.9%	184.3	8.0x	1.2x
Services & Real Estate	1,200	1,171	+28.54	+2.44%	9	65,287	0.9%	1,020.2	9.1%	26.6x	0.5x	BERGERPBL	68,449	1.9%	26.1	18.4x	3.5x
Engineering	2,775	2,775	+0.06	+0.00%	42	311,073	4.4%	985.5	8.7%	18.0x	0.9x	PUBALIBANK	55,753	1.5%	10.2	4.9x	0.7x
Food & Allied	12,565	12,566	-1.34	-0.01%	21	229,376	3.3%	504.7	4.5%	38.7x	3.5x	CITYBANK	52,832	1.5%	133.3	3.6x	0.8x
IT	2,690	2,636	+54.73	+2.08%	11	35,629	0.5%	781.6	6.9%	40.3x	2.2x	RENATA	52,715	1.4%	12.1	19.3x	1.4x
Textile	1,407	1,387	+19.89	+1.43%	58	146,320	2.1%	2,378.7	21.1%	NM	1.0x	ISLAMIBANK	50,393	1.4%	3.6	NM	0.7x
Paper & Printing	4,819	4,778	+40.30	+0.84%	6	22,569	0.3%	141.3	1.3%	NM	1.5x	DUTCHBANGL	47,301	1.3%	38.0	4.2x	0.8x
Tannery	2,119	2,109	+9.27	+0.44%	6	24,604	0.4%	100.3	0.9%	NM	1.5x	EBL	40,270	1.1%	32.1	4.7x	0.7x
Jute	12,875	12,956	-81.09	-0.63%	3	2,808	0.0%	12.7	0.1%	NM	1.8x	UNILEVERCL	39,605	1.1%	0.5	50.9x	16.8x
Ceramics	506	503	+3.68	+0.73%	5	22,883	0.3%	128.4	1.1%	NM	1.5x	ICB	39,460	1.1%	11.9	NM	1.5x
Miscellaneous	2,579	2,602	-22.72	-0.87%	15	140,032	2.0%	677.9	6.0%	55.2x	1.1x	PRIMEBANK	36,437	1.0%	15.9	4.0x	0.8x
Corporate Bond**	18,736	18,749	-12.20	-0.07%	16	41,453	0.6%	0.3	0.0%	NM	NM	POWERGRID	34,999	1.0%	6.5	8.6x	0.3x
Treasury Bond**	2,184	2,179	+4.37	+0.20%	232	3,354,118	47.9%	5.4	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
SEAPEARL	44.0	+10.0%	287.0	NM	3.2x	SQURPHARMA	110,255	7.2%	7.6x	1.3x	MALEKSPIN	43.7	+1.2%	339.2	7.7x	0.7x
GENEXIL	40.0	+9.9%	155.8	18.3x	1.7x	BRACBANK	75,551	4.9%	7.0x	1.3x	BRACBANK	61.3	-2.5%	302.3	7.0x	1.3x
EMERALDOIL	26.2	+9.6%	19.9	NM	NM	ISLAMIBANK	50,302	3.3%	NM	0.7x	SEAPEARL	44.0	+10.0%	287.0	NM	3.2x
SHARPIND	25.8	+9.3%	111.7	NM	3.3x	BXPHERMA	48,282	3.1%	8.0x	1.2x	IPDC	34.9	-1.1%	250.3	30.9x	2.0x
MLDYEING	13.0	+9.2%	77.0	NM	1.1x	WALTONHIL	43,723	2.9%	13.2x	1.1x	EHL	96.1	+3.4%	241.8	10.8x	1.0x
KBPPWBIL	41.7	+9.16%	130.3	60.4x	3.5x	PUBALIBANK	37,985	2.5%	4.9x	0.7x	DOMINAGE	81.4	+2.6%	237.2	NM	4.8x
AIBL1STIMF	5.1	+8.5%	33.4	NM	1x	CITYBANK	36,787	2.4%	3.6x	0.8x	FEKDIL	22.3	+6.2%	229.7	NM	1.2x
RENWICKJA	715.8	+7.5%	3.2	NM	NM	GP	35,027	2.3%	11.7x	5.6x	DSSL	13.4	-	228.2	NM	0.7x
UNIQUEHRL	49.0	+7.2%	131.3	9.8x	0.5x	BATBC	31,137	2.0%	24.8x	2.1x	ITC	50.8	-0.8%	227.3	15.3x	2.1x
SHYAMPSUG	316.0	+6.9%	15.2	NM	NM	EBL	27,609	1.8%	4.7x	0.7x	SAPORTL	48.9	-1.2%	196.2	23.1x	1.4x

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)
INTECH	31.4	-9.8%	2.8	NM	NM	DAFODILCOM	167.3	165.2	12.0	279	46.53
PLFSL	1.2	-7.7%	1.1	NM	NM	SIPLC	111.0	100.0	2.0	340	36.74
FAREASTFIN	1.2	-4.7%	4.8	NM	0.7x	APEXSPINN	395.0	381.0	6.0	81	31.76
ATLASBANG	81.1	-4.7%	4.8	NM	0.7x	DOMINAGE	80.1	73.5	11.0	371	29.13
FAMILYTEX	2.4	-4.0%	0.7	NM	0.2x	BANKASIA	20.1	20.0	3.0	1,080	21.61
ICB3RDNRB	5.2	-3.7%	3.8	NM	0.4x	CITYGENINS	107.1	102.8	4.0	188	20.03
SONARGAON	95.8	-3.5%	44.8	NM	5.3x	IPDC	35.0	34.0	2.0	393	13.74
ECABLES	136.5	-3.3%	3.6	NM	0.4x	ROBI	35.4	35.4	6.0	250	8.85
SINGERBD	77.9	-3.1%	8.2	NM	NM	MALEKSPIN	42.0	42.0	3.0	201	8.44
PRIMEFIN	3.2	-3.0%	2.5	NM	NM	SHYAMPSUG	299.0	284.0	5.0	25	7.17

* 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
DAFODILCOM	167.3	165.2	46.5	279	12
SIPLC	111.0	100.0	36.7	340	2
APEXSPINN	395.0	381.0	31.8	81	6
DOMINAGE	80.1	73.5	29.1	371	11
BANKASIA	20.1	20.0	21.6	1,080	3
CITYGENINS	107.1	102.8	20.0	188	4
IPDC	35.0	34.0	13.7	393	2
ROBI	35.4	35.4	8.9	250	6
MALEKSPIN	42.0	42.0	8.4	201	3
SHYAMPSUG	299.0	284.0	7.2	25	5
FINEFOODS	515.0	480.0	7.0	14	2
SHASHADNIM	26.5	26.0	5.2	195	4
ASIATICLAB	145.0	145.0	4.4	30	1
MEGHNA PET	81.0	80.9	4.2	52	5
BDWELDING	14.0	14.0	4.1	292	2
KARNAPHULI	39.8	39.8	4.0	100	1
SONALIPAPR	215.1	210.2	3.9	19	2
DUTCHBANGL	48.0	48.0	3.8	80	1
GENEXIL	38.0	32.8	3.2	93	3
BDTHAIFOOD	26.6	26.6	2.7	100	1
RELIANCINS	120.5	120.5	2.6	21	2
SAMORITA	96.0	96.0	1.9	20	1
Total			292.7		106

Important DSE News
SICL

Refer to their earlier news disseminated by DSE on 15.06.2026 regarding dividend declaration and Q1 Financials, the company has further informed that there was an inadvertent mistake in NAV per share. The correct NAV per share is Tk. 13.94 instead of Tk. 14.15 as on December 31, 2025. Other information shall remain unchanged.

ICBIBANK

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 21.09.2026, Time: 10:00 AM, Venue: Hybrid system, at TCB Auditorium, TCB Bhaban (1st Floor), Karwanbazar Dhaka-1215. Record Date: 28.07.2026. The Company has also reported EPS of Tk. (1.22), NAV per share of Tk. (22.00) and NOCFPS of Tk. 0.80 for the year ended December 31, 2025 as against Tk. (1.42), Tk. (20.78) and Tk. (1.43) respectively for the year ended December 31, 2024.

(Q1 Un-audited): EPS was Tk. (0.36) for January-March 2026 as against Tk. (0.15) for January-March 2025. NOCFPS was Tk. (0.36) for January-March 2026 as against Tk. (0.77) for January-March 2025. NAV per share was Tk. (22.36) as on March 31, 2026 and Tk. (20.49) as on December 31, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SKTRIMS		0.0%	0.0%	Record Date	9-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
ICBIBANK		0.0%	0.0%	Record Date	28-Jul-26
BIFC		0.0%	0.0%	Record Date	30-Jul-26
FASFIN		0.0%	0.0%	Record Date	30-Jul-26
BXPHERMA		0.0%	47.5%	Record Date	2-Aug-26

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