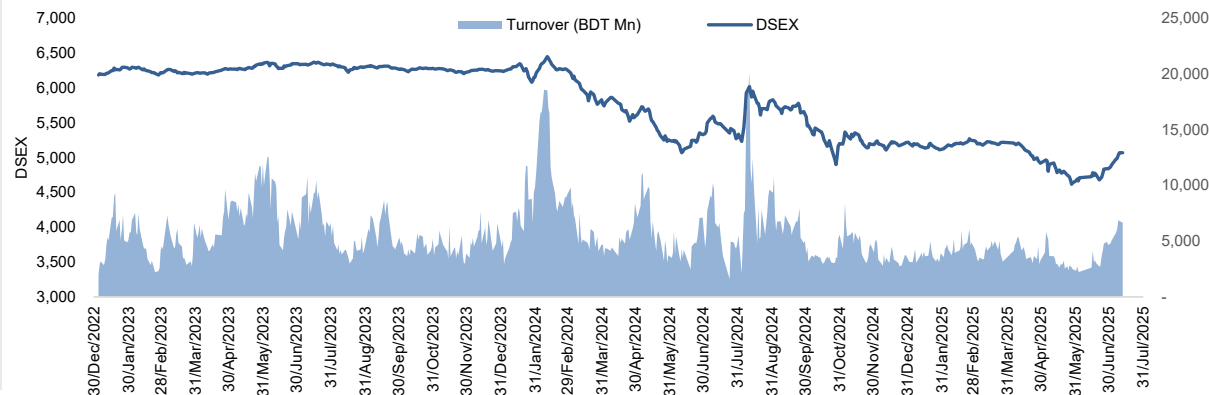


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.03%) lost 1.6 points and closed at 5,066.44. The blue-chip index DS30 (0.00%), the Shariah-based index DSES (+0.19%), and the large-cap index CDSET (-0.01%) closed at 1,908.57, 1,103.07, and 1,031.55 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 1.20%, followed by Food & Allied (+1.05%), Pharmaceutical (+0.18%), Telecommunication (+0.07%), Fuel & Power (-0.19%), Engineering (-0.25%), and Bank (-0.93%), respectively. Block trades contributed 5.1% of the overall market turnover. Midland Bank Limited (-3.0%) was the most traded share with a turnover of BDT 206 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,066.44	5,068.04	-1.60	-0.03%	-2.9%
DS30	1,908.57	1,908.62	-0.05	-0.00%	-1.6%
DSES	1,103.07	1,100.96	+2.11	+0.19%	-5.6%
CDSET	1,031.55	1,031.70	-0.15	-0.01%	-3.2%

	Advanced	Declined	Unchanged	Total
All Category	177	170	55	402
A Category (Equity)	98	96	27	221
B Category (Equity)	32	42	9	83
N Category (Equity)	1	0	0	1
Z Category (Equity)	46	32	19	97
Mutual Funds	10	13	13	36
Corporate Bonds	2	1	1	4
Treasury Bonds	1	3	0	4

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,767,144	6,767,391	-0.0%
	Mn USD	56,108	56,110	-0.0%
Turnover	Mn BDT	6,660	6,790	-1.9%
	Mn USD	55	56	-1.9%
Volume	Mn Shares	268	273	-2.0%
	No. of Trade	207,206	208,356	-0.6%

\* Average Interbank Exchange Rate is BDT 120.61 as of Jul 13, 2025

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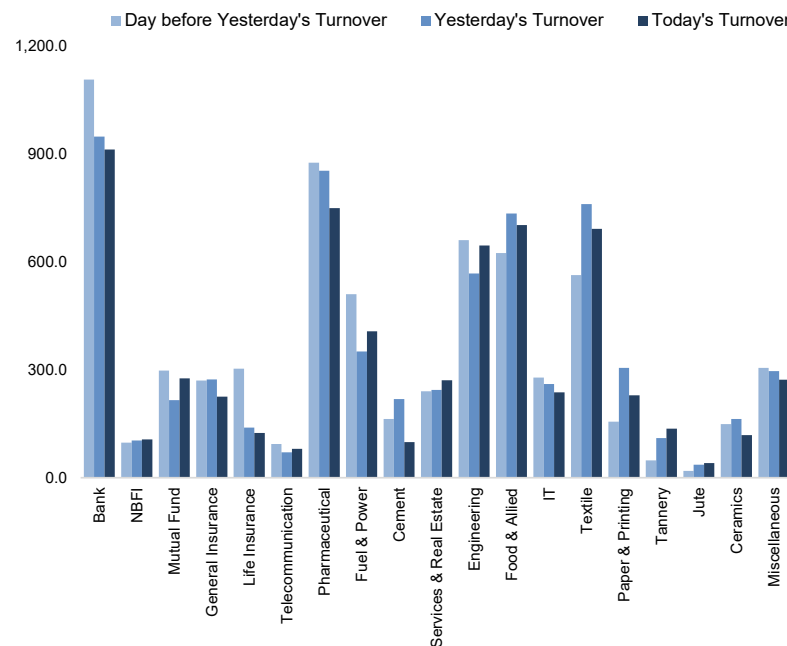
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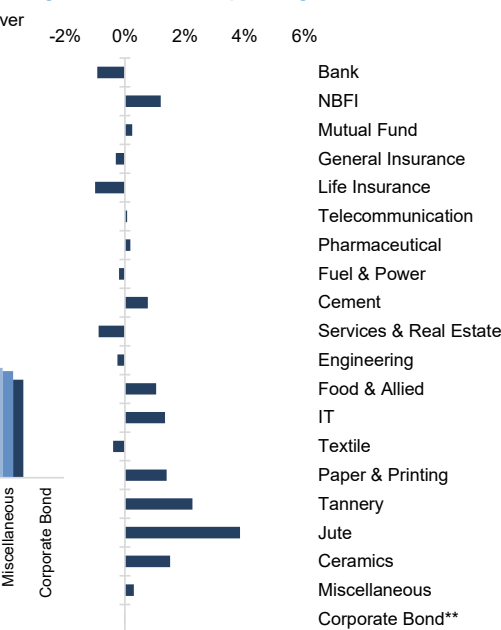
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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



**Market PE** 14.4x

**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	1,445	1,459	-13.51	-0.93%	36	683,801	10.1%	911.1	14.4%	32.8x	0.7x	GP	404,685	11.8%	25.8	13.8x	5.7x
NBFI	1,009	997	+11.93	+1.20%	23	96,187	1.4%	106.5	1.7%	NM	NM	SQURPHARMA	186,687	5.4%	57.7	7.9x	1.4x
Mutual Fund	646	644	+1.57	+0.24%	37	29,677	0.4%	275.8	4.4%	NM	0.6x	BATBC	154,872	4.5%	42.7	9.4x	2.9x
General Insurance	2,567	2,575	-7.80	-0.30%	43	73,263	1.1%	225.2	3.6%	12.3x	1.1x	ROBI	130,948	3.8%	30.6	18.1x	1.9x
Life Insurance	1,657	1,673	-16.67	-1.00%	15	44,064	0.7%	124.5	2.0%	NM	NM	WALTONHIL	127,533	3.7%	8.3	9.9x	1.1x
Telecommunication	4,776	4,773	+3.33	+0.07%	3	560,061	8.3%	80.4	1.3%	14.8x	3.6x	BRACBANK	114,677	3.3%	93.9	8.4x	1.4x
Pharmaceutical	2,881	2,876	+5.27	+0.18%	34	546,190	8.1%	748.4	11.8%	12.6x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,101	1,103	-2.15	-0.19%	23	291,655	4.3%	406.3	6.4%	18.4x	0.6x	MARICO	79,421	2.3%	3.5	13.4x	10.5x
Cement	1,876	1,862	+14.19	+0.76%	7	89,417	1.3%	98.6	1.6%	21.4x	1.9x	BERGERPBL	74,788	2.2%	9.0	21.0x	4.6x
Services & Real Estate	968	976	-8.54	-0.88%	9	53,228	0.8%	270.4	4.3%	24.5x	0.4x	UPGDCL	71,650	2.1%	2.9	6.1x	1.7x
Engineering	2,368	2,374	-5.87	-0.25%	42	267,113	3.9%	645.0	10.2%	12.3x	0.8x	LHB	56,791	1.7%	58.4	15.8x	2.8x
Food & Allied	14,681	14,529	+152.14	+1.05%	21	268,625	4.0%	701.2	11.1%	15.5x	4.3x	RENATA	56,052	1.6%	16.1	19.9x	1.6x
IT	1,832	1,808	+24.27	+1.34%	11	24,170	0.4%	237.2	3.8%	20.3x	1.5x	UNILEVERCL	46,490	1.4%	0.3	79.9x	18.0x
Textile	1,048	1,052	-4.18	-0.40%	58	109,109	1.6%	691.1	10.9%	NM	0.7x	DUTCHBANGL	43,212	1.3%	18.3	9.9x	0.8x
Paper & Printing	4,316	4,257	+59.31	+1.39%	6	19,500	0.3%	228.6	3.6%	NM	0.9x	BXPHARMA	42,782	1.2%	62.5	6.7x	0.9x
Tannery	2,008	1,963	+44.28	+2.26%	6	22,370	0.3%	136.2	2.2%	68.8x	1.6x	ICB	42,149	1.2%	18.3	NM	1.0x
Jute	11,812	11,375	+437.24	+3.84%	3	2,600	0.0%	40.5	0.6%	NM	NM	EBL	39,257	1.1%	29.5	5.8x	0.8x
Ceramics	390	384	+5.80	+1.51%	5	17,503	0.3%	118.6	1.9%	NM	1.1x	PUBALIBANK	33,837	1.0%	9.7	4.3x	0.6x
Miscellaneous	4,048	4,036	+12.09	+0.30%	15	219,806	3.2%	272.1	4.3%	82.2x	1.8x	CITYBANK	32,706	1.0%	144.6	3.2x	0.7x
Corporate Bond**	14,926	14,930	-3.13	-0.02%	16	32,954	0.5%	1.7	0.0%	NM	NM	OLYMPIC	31,810	0.9%	32.2	17.2x	2.6x
Treasury Bond**	2,069	2,068	+0.94	+0.05%	236	3,315,077	49.0%	2.6	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
BDFINANCE	9.9	+10.0%	6.5	NM	NM	SQURPHARMA	108,958	7.7%	7.9x	1.4x	MIDLANDBNK	25.6	-3.0%	205.7	20.1x	1.7x
ARAMIT	190.5	+10.0%	10.5	49.5x	1.5x	ISLAMIBANK	74,730	5.3%	14.6x	0.9x	LOVELLO	95.3	-4.2%	169.0	42.9x	7.5x
GEMINISEA	151.0	+10.0%	49.4	NM	12.3x	BEXIMCO	69,463	4.9%	NM	1.3x	SEAPEARL	58.3	-2.7%	161.9	NM	3.5x
NORTHERN	106.4	+9.9%	1.6	NM	1.3x	BATBC	50,233	3.6%	9.4x	2.9x	CITYBANK	21.5	+1.4%	144.6	3.2x	0.7x
STANCERAM	71.3	+9.9%	2.3	NM	NM	WALTONHIL	46,773	3.3%	9.9x	1.1x	BEACHHATCH	50.2	-	141.9	10.7x	3.0x
QUASEMIND	36.8	+9.85%	102.8	92.0x	1.3x	BRACBANK	46,489	3.3%	8.4x	1.4x	EASTRNLUB	2,619.3	+5.0%	119.0	62.5x	13.6x
RAHIMAFOOD	112.0	+9.8%	70.3	NM	12x	GP	44,708	3.2%	13.8x	5.7x	QUASEMIND	36.8	+9.9%	102.8	92.0x	1.3x
GQBALLPEN	215.0	+9.7%	47.7	NM	1.6x	RENATA	32,968	2.3%	19.9x	1.6x	BRACBANK	57.6	-1.9%	93.9	8.4x	1.4x
DBH1STMF	5.8	+9.4%	11.2	NM	0.7x	BXPHARMA	23,409	1.7%	6.7x	0.9x	SPCL	41.7	+2.0%	84.0	NM	1.1x
EBL1STMF	5.0	+8.7%	21.3	NM	0.5x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	TECHNODRUG	32.0	+3.6%	83.2	NM	1.1x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.2x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FAMILYTEX	2.3	-8.0%	1.0	NM	0.2x	LHB	20,953	1.5%	15.8x	2.8x	BANKASIA	16.3	16.3	1.0	10,230	166.75
RUPALIBANK	22.5	-6.3%	41.5	NM	1x	OLYMPIC	20,496	1.5%	17.2x	2.6x	RENATA	489.0	489.0	1.0	50	24.45
PENINSULA	10.6	-5.4%	6.3	NM	0.4x	ALARABANK	18,282	1.3%	35.1x	0.8x	AL-HAJTEX	138.5	124.5	15.0	186	23.30
DSHGARME	117.7	-4.8%	33.2	NM	6.4x	BEACONPHAR	17,838	1.3%	30.5x	4.1x	SHARPIND	19.1	19.1	1.0	1,000	19.10
LOVELLO	95.3	-4.2%	169.0	42.9x	7.5x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	DBH1STMF	5.4	5.1	6.0	3,450	18.12
ABBANK	6.9	-4.2%	13.5	NM	1.5x	ROBI	14,876	1.1%	18.1x	1.9x	LOVELLO	100.4	91.0	8.0	161	15.67
VFSTD	6.9	-4.2%	1.8	57.5x	0.3x	UTTARABANK	13,699	1.0%	NM	0.6x	EASTRNLUB	2,604.0	2,600.0	4.0	4	11.44
SKTRIMS	10.2	-3.8%	0.9	NM	0.7x	NBL	13,055	0.9%	NM	9.3x	MLDYEING	9.3	9.3	1.0	1,050	9.77
SUNLIFEINS	59.2	-3.7%	14.8	NM	NM	BSRMLTD	12,852	0.9%	4.6x	0.5x	ASIATICLAB	44.0	44.0	1.0	134	5.90
UCB	10.4	-3.7%	10.8	3.8x	0.4x	* 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										
											DGIC	26.4	25.0	3.0	223	5.68

\* 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	Important DSE News
BANKASIA	16.3	16.3	166.7	10,230	1	<b>GIB</b> The company has informed that the Board of Directors has assigned the Deputy Managing Director, Mr. Ataus Samad as Managing Director (Current Charge) of the company.
RENATA	489.0	489.0	24.5	50	1	
AL-HAJTEX	138.5	124.5	23.3	186	15	
SHARPIND	19.1	19.1	19.1	1,000	1	
DBH1STMF	5.4	5.1	18.1	3,450	6	
LOVELLO	100.4	91.0	15.7	161	8	
EASTRNLUB	2,604.0	2,600.0	11.4	4	4	
MLDYEING	9.3	9.3	9.8	1,050	1	
ASIATICLAB	44.0	44.0	5.9	134	1	
DGIC	26.4	25.0	5.7	223	3	
DBH	37.0	37.0	3.7	100	1	
REPUBLIC	28.6	28.6	3.5	123	1	
EIL	46.2	46.2	3.2	70	1	
QUASEMIND	35.6	34.4	3.1	88	4	
HAKKANIPUL	61.0	61.0	2.7	43	2	
KAY&QUE	195.1	195.1	1.9	9	1	
JMISMDL	127.0	127.0	1.8	14	3	
JHRML	49.1	49.1	1.8	37	1	
SONALIANS	180.0	180.0	1.8	10	1	
NEWLINE	8.0	8.0	1.7	209	1	
ADNTEL	77.2	75.5	1.6	21	2	
SPCL	40.0	40.0	1.5	37	1	
<b>Total</b>			<b>338.0</b>		<b>72</b>	

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
CLICL		0.0%	0.0%	Record Date	24-Jul-25
BERGERPBL		0.0%	525.0%	Record Date	24-Jul-25

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