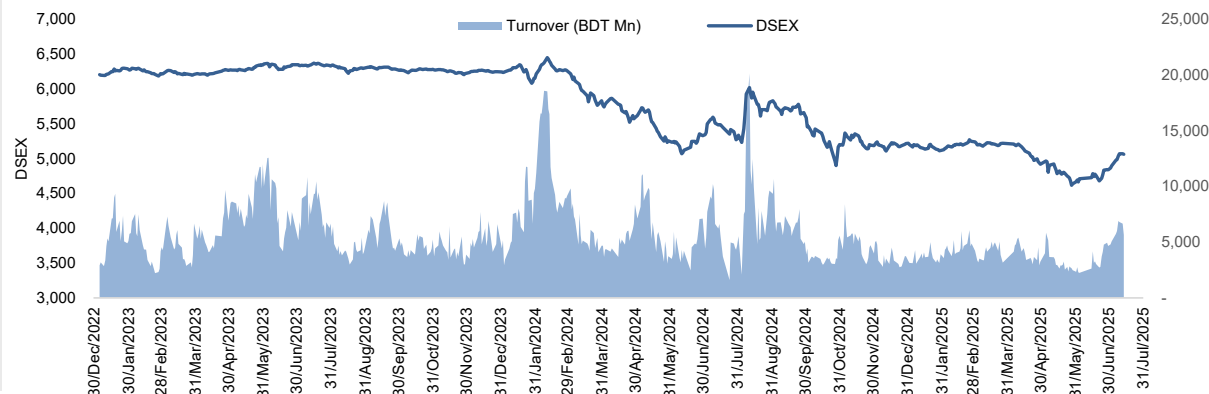


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.09%) lost 4.6 points and closed at 5,061.83. The blue-chip index DS30 (-0.45%), the Shariah-based index DSES (+0.09%), and the large-cap index CDSET (-0.20%) closed at 1,900.02, 1,104.02, and 1,029.48 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.24% followed by Food & Allied (-1.12%), Telecommunication (-0.58%), Fuel & Power (-0.25%), Engineering (-0.06%), Pharmaceutical (+0.07%), and Bank (+0.30%), respectively. Block trades contributed 2.8% of the overall market turnover. BRAC Bank Ltd. (-0.3%) was the most traded share with a turnover of BDT 142 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,061.83	5,066.44	-4.60	-0.09%	-3.0%
DS30	1,900.02	1,908.57	-8.55	-0.45%	-2.0%
DSES	1,104.02	1,103.07	+0.95	+0.09%	-5.6%
CDSET	1,029.48	1,031.55	-2.07	-0.20%	-3.4%

	Advanced	Declined	Unchanged	Total
All Category	156	163	76	395
A Category (Equity)	108	80	28	216
B Category (Equity)	25	46	11	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	23	37	37	97
Mutual Funds	23	1	12	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,803,692	6,767,144	+0.5%
	Mn USD	56,828	56,522	
Turnover	Mn BDT	5,644	6,660	-15.3%
	Mn USD	47	56	
Volume	Mn Shares	221	268	-17.5%
No. of Trade		188,894	207,206	-8.8%

* Average Interbank Exchange Rate is BDT 119.73 as of Jul 14, 2025

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Figure: Sectorial Turnover (BDT Mn)

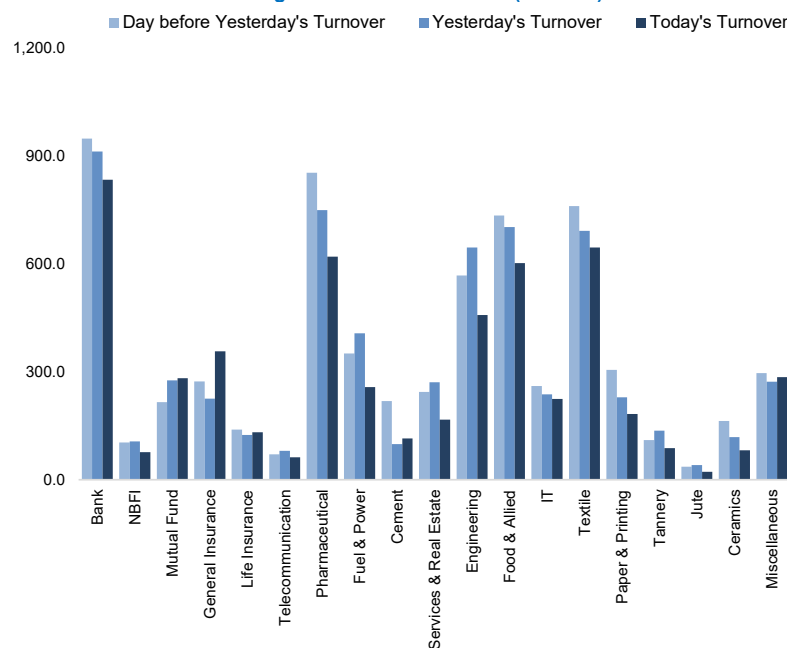
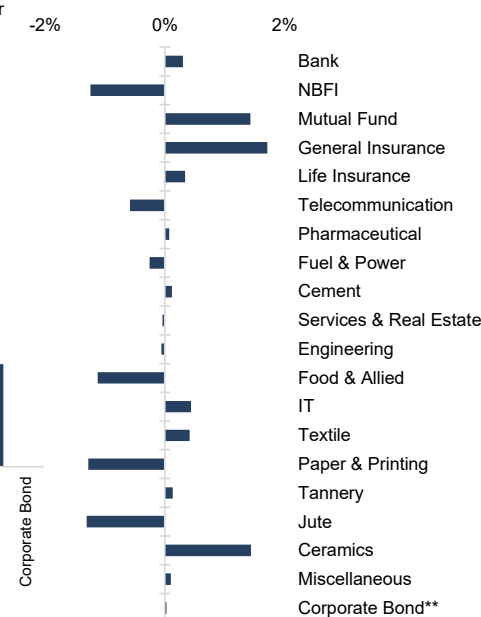


Figure: Sectorial Mcap Change



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	1,450	1,445	+4.40	+0.30%	36	685,885	10.1%	833.0	15.2%	32.9x	0.7x	GP	402,389	11.7%	31.6	13.8x	5.7x
NBFI	997	1,009	-12.55	-1.24%	23	94,991	1.4%	76.4	1.4%	NM	NM	SQURPHARMA	187,396	5.5%	67.0	8.0x	1.4x
Mutual Fund	655	646	+9.22	+1.43%	37	30,101	0.4%	281.6	5.1%	NM	0.6x	BATBC	152,280	4.4%	91.2	9.2x	2.9x
General Insurance	2,611	2,567	+43.97	+1.71%	43	74,518	1.1%	356.3	6.5%	12.5x	1.1x	ROBI	130,425	3.8%	20.8	18.0x	1.9x
Life Insurance	1,662	1,657	+5.59	+0.34%	15	44,213	0.7%	131.4	2.4%	NM	NM	WALTONHIL	128,108	3.7%	5.4	9.9x	1.1x
Telecommunication	4,749	4,776	-27.71	-0.58%	3	556,811	8.2%	62.3	1.1%	14.7x	3.5x	BRACBANK	114,279	3.3%	142.4	8.4x	1.4x
Pharmaceutical	2,883	2,881	+2.08	+0.07%	34	546,584	8.1%	619.4	11.3%	12.6x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,098	1,101	-2.78	-0.25%	23	290,919	4.3%	257.4	4.7%	18.3x	0.6x	MARICO	80,744	2.4%	10.8	13.7x	10.7x
Cement	1,879	1,876	+2.26	+0.12%	7	89,525	1.3%	114.9	2.1%	21.4x	1.9x	BERGERPBL	74,523	2.2%	12.0	20.9x	4.6x
Services & Real Estate	967	968	-0.37	-0.04%	9	53,207	0.8%	166.8	3.0%	24.5x	0.4x	UPGDCL	71,650	2.1%	3.3	6.1x	1.7x
Engineering	2,366	2,368	-1.38	-0.06%	42	266,957	3.9%	457.0	8.3%	12.3x	0.8x	LHB	56,675	1.7%	49.6	15.8x	2.8x
Food & Allied	14,516	14,681	-164.63	-1.12%	21	265,612	3.9%	601.2	11.0%	15.4x	4.2x	RENATA	56,190	1.6%	16.2	20.0x	1.6x
IT	1,840	1,832	+8.01	+0.44%	11	24,276	0.4%	224.3	4.1%	20.4x	1.5x	UNILEVERCL	46,625	1.4%	0.3	80.2x	18.1x
Textile	1,052	1,048	+4.35	+0.41%	58	109,562	1.6%	644.6	11.8%	NM	0.7x	DUTCHBANGL	42,825	1.2%	11.5	9.9x	0.8x
Paper & Printing	4,261	4,316	-55.09	-1.28%	6	19,251	0.3%	182.8	3.3%	NM	0.9x	BXPBARMA	42,158	1.2%	36.5	6.6x	0.8x
Tannery	2,010	2,008	+2.67	+0.13%	6	22,399	0.3%	87.6	1.6%	68.9x	1.6x	ICB	41,195	1.2%	9.4	NM	1.0x
Jute	11,658	11,812	-154.28	-1.31%	3	2,566	0.0%	22.0	0.4%	NM	NM	EBL	38,938	1.1%	34.8	5.7x	0.8x
Ceramics	396	390	+5.61	+1.44%	5	17,755	0.3%	81.5	1.5%	NM	1.1x	PUBALIBANK	33,707	1.0%	4.0	4.3x	0.6x
Miscellaneous	4,052	4,048	+4.01	+0.10%	15	220,024	3.3%	284.5	5.2%	82.2x	1.8x	CITYBANK	32,402	0.9%	58.0	3.2x	0.7x
Corporate Bond**	14,931	14,926	+4.08	+0.03%	16	32,963	0.5%	0.4	0.0%	NM	NM	OLYMPIC	31,430	0.9%	14.4	17.0x	2.6x
Treasury Bond**	2,068	2,069	-0.69	-0.03%	236	3,313,286	49.0%	0.0	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
DAFODILCOM	60.2	+9.9%	22.9	NM	4.6x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	BRACBANK	57.4	-0.3%	142.4	8.4x	1.4x
PADMALIFE	24.0	+9.6%	12.3	NM	NM	ISLAMIBANK	74,730	5.3%	15.3x	1.0x	KBPPWBIL	121.6	+6.4%	135.5	NM	10.2x
YPL	15.0	+9.5%	13.6	NM	2.8x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	49.6	-1.2%	107.4	10.6x	3.0x
ARAMIT	208.2	+9.3%	25.6	54.1x	1.6x	BATBC	50,233	3.6%	9.2x	2.9x	BATBC	282.0	-1.7%	91.2	9.2x	2.9x
RAHIMTEXT	163.8	+8.9%	25.7	NM	6.5x	WALTONHIL	46,773	3.3%	9.9x	1.1x	SEAPEARL	57.9	-0.7%	88.3	NM	3.5x
APEXSPINN	114.0	+8.78%	31.5	30.6x	1.8x	BRACBANK	46,489	3.3%	8.4x	1.4x	ORIONINFU	338.0	+1.2%	87.6	NM	21.5x
DBH1STMF	6.3	+8.6%	17.6	NM	1x	GP	44,708	3.2%	13.8x	5.7x	ISLAMIBANK	44.4	+5.0%	87.2	15.3x	1.0x
INTECH	20.7	+6.7%	14.3	NM	NM	RENATA	32,968	2.3%	20.0x	1.6x	AIL	50.0	-0.6%	86.3	18.5x	2.1x
ALLTEX	11.6	+6.4%	0.9	NM	0.6x	BXPBARMA	23,409	1.7%	6.6x	0.8x	RAHIMAFOD	114.9	+2.6%	83.4	NM	12.5x
KBPPWBIL	121.6	+6.4%	135.5	NM	10.2x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	MIDLANDBNK	25.9	+1.2%	76.3	20.4x	1.7x
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)
JUTESPINN	211.3	-4.8%	0.5	NM	NM	LHB	20,953	1.5%	15.8x	2.8x	EASTRNLUB	2,750.2	2,650.0	13.0	13	34.10
REGENTTEX	4.0	-4.8%	0.6	NM	0x	OLYMPIC	20,496	1.5%	17.0x	2.6x	FINEFOODS	245.0	230.0	7.0	109	26.15
ARAMITCEM	13.1	-4.4%	0.8	NM	NM	ALARABANK	18,282	1.3%	35.6x	0.8x	RENATA	489.0	489.0	1.0	50	24.45
SAFKOSPINN	11.4	-4.2%	0.7	NM	NM	BEACONPHAR	17,838	1.3%	30.5x	4.1x	MLDYEING	9.2	9.2	2.0	2,101	19.33
HAMI	101.1	-3.6%	6.7	NM	11.1x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	ASIATICLAB	45.0	41.6	6.0	131	5.70
NTC	168.7	-3.4%	0.9	NM	NM	ROBI	14,876	1.1%	18.0x	1.9x	EXIM1STMF	5.0	4.9	3.0	1,029	5.14
EPGL	17.2	-3.4%	28.1	NM	0.5x	UTTARABANK	13,699	1.0%	NM	0.6x	MIDLANDBNK	25.5	25.5	3.0	200	5.11
PREMIERLEA	3.0	-3.2%	0.2	NM	NM	NBL	13,055	0.9%	NM	9.1x	LOVELLO	92.5	88.1	4.0	54	4.82
ADVENT	15.0	-3.2%	5.5	28.8x	0.9x	BSRMLTD	12,852	0.9%	4.6x	0.5x	RELANCE1	17.4	17.4	3.0	235	4.09
JMISMDL	138.8	-3.2%	2.4	56.2x	1.6x	* 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					MONNOCERA	97.0	97.0	1.0	37	3.59

* 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
EASTRN LUB	2,750.2	2,650.0	34.1	13	13
FINEFOODS	245.0	230.0	26.1	109	7
RENATA	489.0	489.0	24.5	50	1
MLDYEING	9.2	9.2	19.3	2,101	2
ASIATIC LAB	45.0	41.6	5.7	131	6
EXIM1STMF	5.0	4.9	5.1	1,029	3
MIDLANDBNK	25.5	25.5	5.1	200	3
LOVELLO	92.5	88.1	4.8	54	4
RELIANCE1	17.4	17.4	4.1	235	3
MONNOCERA	97.0	97.0	3.6	37	1
FUWANGFOOD	17.5	17.5	3.6	203	1
GQBALLPEN	197.2	197.2	3.5	18	1
KDSALTD	45.0	45.0	2.7	60	1
HAMI	110.0	110.0	2.2	20	1
UTTARABANK	19.6	19.6	2.0	100	1
ISLAMIBANK	45.5	44.0	1.8	40	2
HAKKANIPUL	70.0	61.3	1.7	25	3
SALVOCHEM	25.8	21.2	1.5	65	2
BEACONPHAR	124.5	124.5	1.5	12	1
KBPPWBIL	104.0	104.0	1.2	12	1
INTRACO	22.0	22.0	1.0	45	1
JMISMDL	129.1	129.1	0.8	6	1
Total			158.3		64

Important DSE News
PHENIXINS

The company has informed that as per the decision of 411st Board meeting Mr. Chowdhury Akram Ullah, Vice President, Board Department of Head Office has been given the charge of the Company Secretary of the company.

BERGERPBL

Refer to their earlier news disseminated by DSE on 29.05.2025 regarding record date & subscription period for rights share issuance, the company has further informed that the subscription period for 1:1 share offering (after renunciation by sponsor/director shareholders) through Rights issuance is 15 July to 3 August 2025 (both days inclusive). BRAC Bank PLC and Mutual Trust Bank PLC are the bankers to the issue Application forms and other documents have been sent to the eligible shareholders through courier. The forms are also available at the company's website www.bergerbd.com/rights-share.

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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