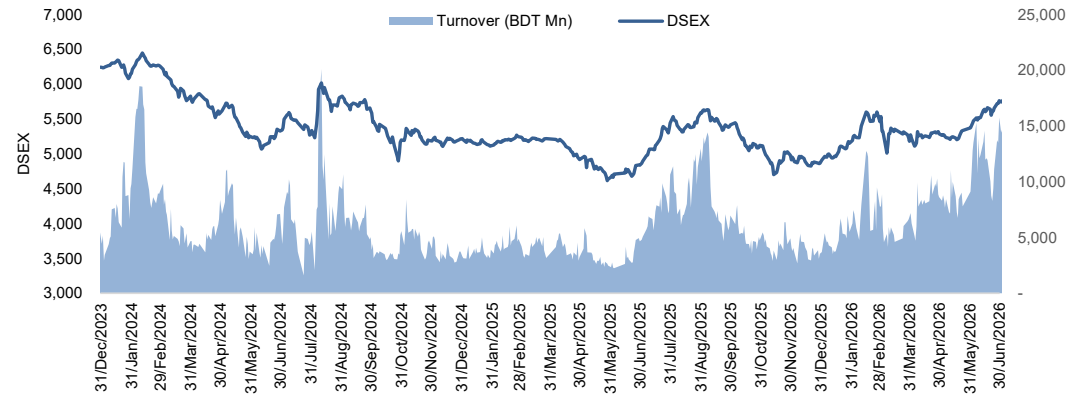


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.76%) gained 44.69 points and closed at 5,911.24. The blue-chip index DS30 (+1.09%), the Shariah-based index DSES (+0.86%), and the large-cap index CDSET (+0.79%) closed at 2,227.10, 1,207.04, and 1,167.11 points, respectively. All the large-cap sectors posted positive performance today. Bank booked the highest gain of 1.04% followed by Pharmaceutical (+0.70%), Telecommunication (+0.59%), Food & Allied (+0.57%), NBFI (+0.49%), Engineering (+0.39%), and Fuel & Power (+0.14%), respectively. Block trades contributed 1.8% of the overall market turnover. Taufika Foods and Lovello Ice-cream PLC (+1.3%) was the most traded share with a turnover of BDT 750 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,911.24	5,866.55	+44.69	+0.76%	+21.5%
DS30	2,227.10	2,203.09	+24.01	+1.09%	+20.2%
DSES	1,207.04	1,196.80	+10.24	+0.86%	+20.6%
CDSET	1,167.11	1,157.99	+9.12	+0.79%	+16.2%

	Advanced	Declined	Unchanged	Total
All Category	199	137	57	393
A Category (Equity)	91	84	23	198
B Category (Equity)	46	21	7	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	62	32	27	121
Mutual Funds	4	16	14	34
Corporate Bonds	0	2	0	2
Treasury Bonds	0	5	0	5

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,107,726	7,077,135	+0.4%
	Mn USD	57,541	57,293	
Turnover	Mn BDT	16,513	14,192	+16.4%
	Mn USD	134	115	
Volume	Mn Shares	465	437	+6.4%
No. of Trade		356,667	328,447	+8.6%

* Average Interbank Exchange Rate is BDT 123.52 as of Jul 14, 2026

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Tasviha Taher Trishila Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

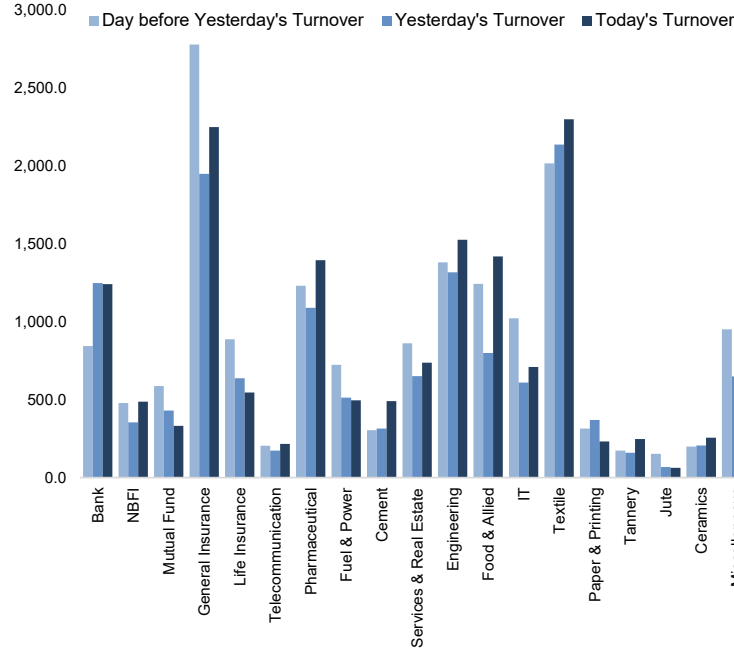
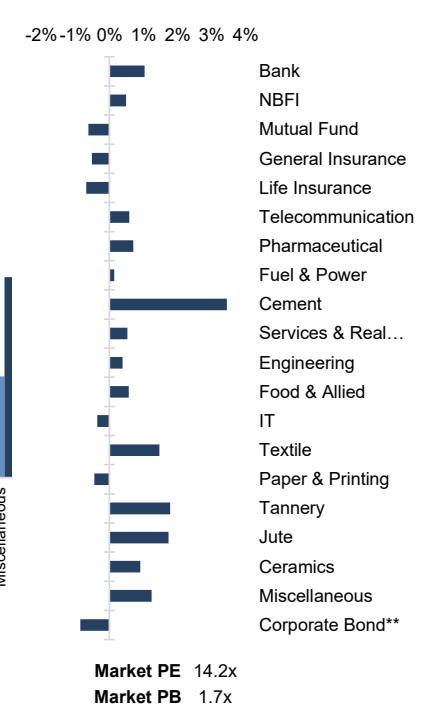


Figure: Sectorial Mcap Change



* 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	1,578	1,562	+16.18	+1.04%	36	752,095	10.6%	1,239.2	7.6%	7.1x	0.7x	GP	349,188	9.4%	39.3	11.7x	5.6x
NBFI	1,186	1,181	+5.81	+0.49%	23	112,826	1.6%	487.1	3.0%	NM	1.2x	SQURPHARMA	197,767	5.3%	104.3	7.6x	1.3x
Mutual Fund	616	620	-3.84	-0.62%	36	29,676	0.4%	331.5	2.0%	NM	0.5x	ROBI	172,328	4.6%	130.2	16.5x	2.4x
General Insurance	4,497	4,520	-23.20	-0.51%	43	127,055	1.8%	2,246.1	13.9%	20.4x	1.8x	BRACBANK	148,364	4.0%	281.1	7.5x	1.3x
Life Insurance	2,039	2,053	-13.92	-0.68%	15	57,489	0.8%	544.7	3.4%	NM	NM	WALTONHIL	134,788	3.6%	33.4	13.4x	1.1x
Telecommunication	4,757	4,730	+27.71	+0.59%	3	552,022	7.8%	215.5	1.3%	12.9x	3.6x	BATBC	121,392	3.3%	63.5	25.5x	2.2x
Pharmaceutical	3,257	3,234	+22.67	+0.70%	34	614,834	8.6%	1,393.5	8.6%	11.2x	1.6x	MARICO	86,313	2.3%	23.8	7.5x	29.8x
Fuel & Power	1,203	1,201	+1.74	+0.14%	23	317,604	4.5%	495.6	3.1%	10.2x	0.6x	UPGDCL	75,534	2.0%	14.8	8.1x	1.6x
Cement	2,266	2,190	+75.57	+3.45%	7	106,600	1.5%	491.0	3.0%	24.7x	2.3x	LHB	69,799	1.9%	311.6	14.4x	3.5x
Services & Real Estate	1,233	1,227	+6.45	+0.53%	9	67,108	0.9%	737.4	4.5%	27.3x	0.5x	BXPHARMA	69,326	1.9%	191.7	8.0x	1.2x
Engineering	2,858	2,847	+11.11	+0.39%	42	320,381	4.5%	1,524.9	9.4%	18.5x	0.9x	PUBALIBANK	58,252	1.6%	13.2	5.2x	0.8x
Food & Allied	12,924	12,850	+73.52	+0.57%	21	235,935	3.3%	1,417.8	8.7%	39.8x	3.6x	CITYBANK	54,931	1.5%	198.0	3.7x	0.8x
IT	2,667	2,677	-9.53	-0.36%	11	35,319	0.5%	708.5	4.4%	45.9x	2.2x	RENATA	53,804	1.4%	30.7	19.7x	1.5x
Textile	1,436	1,415	+20.83	+1.47%	58	149,391	2.1%	2,295.6	14.2%	NM	1.0x	ISLAMIBANK	52,325	1.4%	5.7	NM	0.8x
Paper & Printing	5,079	5,102	-22.75	-0.45%	6	23,790	0.3%	231.2	1.4%	NM	1.6x	DUTCHBANGL	49,026	1.3%	73.9	4.3x	0.8x
Tannery	2,227	2,188	+39.11	+1.79%	6	25,858	0.4%	246.9	1.5%	NM	1.6x	ICB	41,455	1.1%	21.3	NM	1.6x
Jute	14,371	14,126	+245.49	+1.74%	3	3,135	0.0%	62.9	0.4%	NM	2.0x	EBL	40,270	1.1%	80.7	4.7x	0.7x
Ceramics	509	504	+4.58	+0.91%	5	22,999	0.3%	255.2	1.6%	NM	1.5x	UNILEVERCL	39,863	1.1%	0.8	51.3x	16.9x
Miscellaneous	2,619	2,586	+32.17	+1.24%	15	142,193	2.0%	1,283.9	7.9%	55.7x	1.1x	POWERGRID	38,014	1.0%	5.9	9.4x	0.3x
Corporate Bond**	18,737	18,899	-161.81	-0.86%	16	41,455	0.6%	0.0	0.0%	NM	NM	PRIMEBANK	37,046	1.0%	73.7	4.1x	0.8x
Treasury Bond**	2,196	2,193	+3.10	+0.14%	232	3,373,827	47.4%	1.6	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
AMANFEED	37.5	+10.0%	140.5	NM	1.3x	SQURPHARMA	110,453	7.0%	7.6x	1.3x	LOVELLO	76.7	+1.3%	749.7	25.1x	5.7x
NTC	183.2	+10.0%	10.4	NM	NM	BRACBANK	79,864	5.1%	7.5x	1.3x	BSC	127.8	+3.4%	492.6	6.8x	1.1x
NORTHERN	123.8	+9.9%	6.8	NM	1.5x	ISLAMIBANK	52,231	3.3%	NM	0.8x	MALEKSPIN	45.5	-	365.5	8.0x	0.7x
RAHIMAFOOD	94.1	+9.9%	14.8	NM	10.4x	BXPHARMA	48,438	3.1%	8.0x	1.2x	LHB	60.1	+4.7%	311.6	14.4x	3.5x
APEXTANRY	113.8	+9.4%	72.1	NM	0.5x	WALTONHIL	44,359	2.8%	13.4x	1.1x	IPDC	33.3	+2.1%	296.2	29.5x	1.9x
FAMILYTEX	2.4	+9.09%	2.0	NM	0.2x	PUBALIBANK	39,687	2.5%	5.2x	0.8x	BRACBANK	64.8	+1.7%	281.1	7.5x	1.3x
FAREASTFIN	1.2	+9.1%	1.0	NM	NM	CITYBANK	38,249	2.4%	3.7x	0.8x	ASIATICLAB	142.8	+0.4%	271.2	32.8x	2.5x
FARCHEM	21.7	+9.0%	44.1	NM	0.7x	GP	34,919	2.2%	11.7x	5.6x	BSRMSTEEL	98.5	+5.3%	268.2	6.1x	1.0x
JUTESPINN	246.4	+8.5%	5.4	NM	NM	BATBC	32,108	2.0%	25.5x	2.2x	SAPORTL	52.5	+2.5%	267.6	24.8x	1.5x
RUPALIBANK	18.3	+8.3%	21.6	NM	1.6x	EBL	27,609	1.8%	4.7x	0.7x	EHL	100.1	+0.8%	212.1	11.2x	1.1x
						RENATA	26,208	1.7%	19.7x	1.5x						
						LHB	25,553	1.6%	14.4x	3.5x						
						PRIMEBANK	23,143	1.5%	4.1x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
						OLYMPIC	20,145	1.3%	17.0x	2.4x	GQBALLPEN	632.7	550.0	32.0	137	77.66
						UTTARABANK	17,946	1.1%	NM	0.8x	MALEKSPIN	45.5	44.0	5.0	568	25.16
						ROBI	17,233	1.1%	16.5x	2.4x	EBL	24.4	24.4	1.0	1,000	24.40
						BSRMLTD	17,005	1.1%	4.9x	0.6x	LOVELLO	83.0	76.5	5.0	295	22.94
						BEXIMCO	16,657	1.1%	NM	0.3x	ALARABANK	16.0	16.0	1.0	1,214	19.43
						BEACONPHAR	15,948	1.0%	18.2x	3.4x	BEACONPHAR	106.1	106.1	1.0	134	14.24
						ALARABANK	15,643	1.0%	19.0x	0.8x	PF1STMF	11.3	11.0	2.0	1,211	13.38
											DOMINAGE	76.0	72.0	7.0	148	10.97
											BRACBANK	63.8	63.8	1.0	150	9.57
											BESTHLONG	17.6	17.6	2.0	420	7.39

* 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
GQBALLPEN	632.7	550.0	77.7	137	32
MALEKSPIN	45.5	44.0	25.2	568	5
EBL	24.4	24.4	24.4	1,000	1
LOVELLO	83.0	76.5	22.9	295	5
ALARABANK	16.0	16.0	19.4	1,214	1
BEACONPHAR	106.1	106.1	14.2	134	1
PF1STMF	11.3	11.0	13.4	1,211	2
DOMINAGE	76.0	72.0	11.0	148	7
BRACBANK	63.8	63.8	9.6	150	1
BESTHLDNG	17.6	17.6	7.4	420	2
ASIATICLAB	128.0	128.0	7.3	57	1
AMANFEED	37.5	34.7	7.2	195	3
ISLAMIINS	65.0	65.0	7.2	111	4
DSHGARME	162.1	160.0	6.2	38	5
NAHEEACP	39.5	38.0	5.2	133	3
NAVANAPHAR	79.5	79.5	3.6	45	3
NFML	22.8	22.6	3.2	140	2
SUNLIFEINS	83.0	82.1	3.1	38	2
MEGHNA PET	80.3	80.3	3.1	38	2
FINEFOODS	482.0	455.0	2.9	6	3
PRAGATIINS	90.8	89.0	2.4	27	2
SPCERAMICS	26.4	26.0	2.2	83	2
Total			302.8		118

Important DSE News
SKTRIMS

(Q1 Un-audited): EPS was Tk. (0.33) for July-September 2025 as against Tk. (0.53) for July-September 2024; NOCFPS was Tk. 0.28 for July-September 2025 as against Tk. (0.02) for July-September 2024. NAV per share was Tk. 11.93 as on September 30, 2025 and Tk. 14.96 as on September 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BXPHARMA		0.0%	47.5%	Record Date	2-Aug-26
SONALILIFE		0.0%	15.0%	Record Date	2-Aug-26
ISLAMICFIN		0.0%	0.0%	Record Date	9-Aug-26

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.