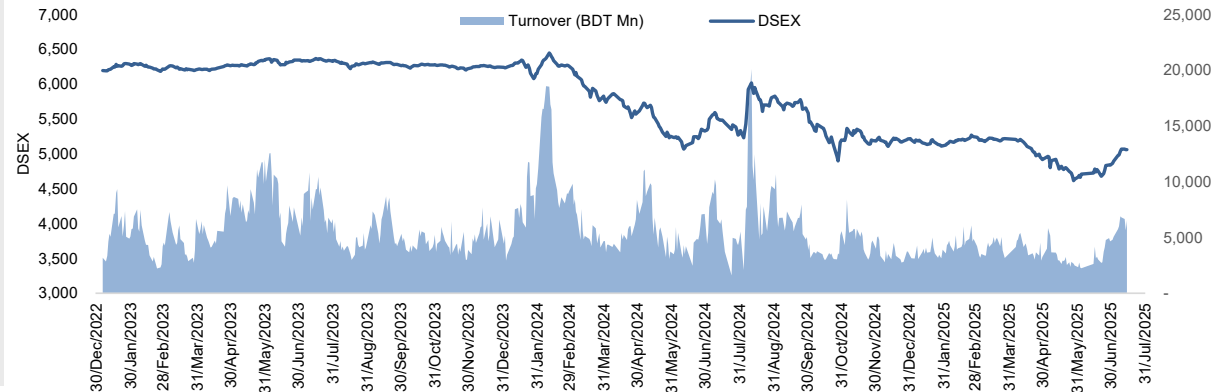


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.01%) gained 0.37 points and closed at 5,062.20. The blue-chip index DS30 (-0.48%), the Shariah-based index DSES (-0.14%), and the large-cap index CDSET (-0.38%) closed at 1,890.93, 1,102.47, and 1,025.55 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 1.28%, followed by Engineering (+0.37%), Pharmaceutical (+0.09%), Fuel & Power (+0.04%), Telecommunication (-0.04%), Bank (-0.52%), and Food & Allied (-0.54%), respectively. Block trades contributed 2.7% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (-1.7%) was the most traded share with a turnover of BDT 240 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,062.20	5,061.83	+0.37	+0.01%	-3.0%
DS30	1,890.93	1,900.02	-9.10	-0.48%	-2.5%
DSES	1,102.47	1,104.02	-1.55	-0.14%	-5.7%
CDSET	1,025.55	1,029.48	-3.93	-0.38%	-3.8%

	Advanced	Declined	Unchanged	Total
All Category	163	156	76	395
A Category (Equity)	84	97	37	218
B Category (Equity)	44	23	14	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	35	36	25	96
Mutual Funds	4	19	13	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,776,310	6,803,692	-0.4%
	Mn USD	55,948	56,174	
Turnover	Mn BDT	6,537	5,644	+15.8%
	Mn USD	54	47	
Volume	Mn Shares	233	221	+5.4%
No. of Trade		205,628	188,894	+8.9%

* Average Interbank Exchange Rate is BDT 121.12 as of Jul 15, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
---	--

Figure: Sectorial Turnover (BDT Mn)

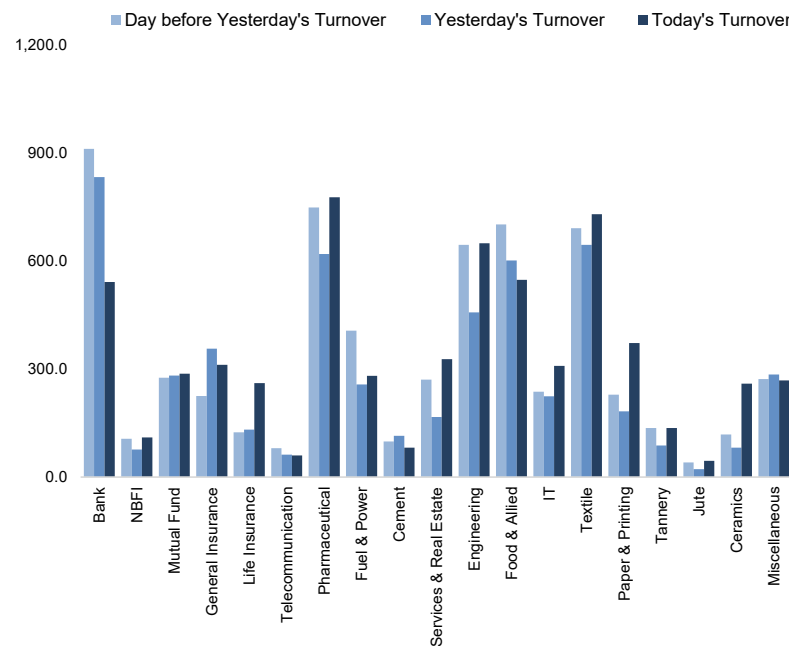
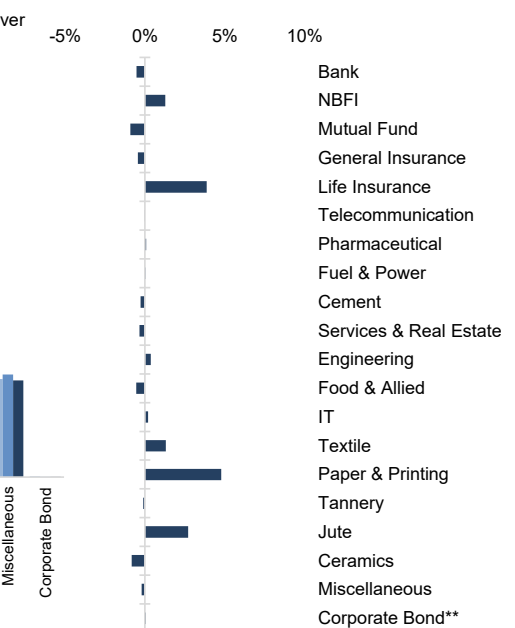


Figure: Sectorial Mcap Change



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	1,442	1,450	-7.60	-0.52%	36	682,287	10.1%	541.5	8.5%	32.7x	0.7x	GP	401,849	11.7%	31.0	13.7x	5.7x
NBFI	1,010	997	+12.73	+1.28%	23	96,204	1.4%	110.1	1.7%	NM	NM	SQURPHARMA	187,218	5.5%	51.3	8.0x	1.4x
Mutual Fund	649	655	-5.98	-0.91%	37	29,826	0.4%	287.2	4.5%	NM	0.6x	BATBC	151,308	4.4%	78.1	9.1x	2.9x
General Insurance	2,600	2,611	-11.47	-0.44%	43	74,190	1.1%	311.6	4.9%	12.5x	1.1x	ROBI	130,948	3.8%	22.4	18.1x	1.9x
Life Insurance	1,727	1,662	+64.39	+3.87%	15	45,926	0.7%	260.9	4.1%	NM	NM	WALTONHIL	127,987	3.7%	4.1	9.9x	1.1x
Telecommunication	4,747	4,749	-1.89	-0.04%	3	556,589	8.3%	59.8	0.9%	14.7x	3.5x	BRACBANK	114,478	3.3%	106.1	8.4x	1.4x
Pharmaceutical	2,886	2,883	+2.55	+0.09%	34	547,068	8.1%	776.9	12.2%	12.6x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,099	1,098	+0.41	+0.04%	23	291,027	4.3%	281.2	4.4%	18.3x	0.6x	MARICO	81,991	2.4%	15.0	13.9x	10.9x
Cement	1,873	1,879	-5.22	-0.28%	7	89,276	1.3%	81.9	1.3%	21.4x	1.9x	BERGERPBL	74,224	2.2%	9.2	20.8x	4.5x
Services & Real Estate	964	967	-3.26	-0.34%	9	53,028	0.8%	327.0	5.1%	24.4x	0.4x	UPGDCL	71,824	2.1%	3.9	6.2x	1.7x
Engineering	2,375	2,366	+8.72	+0.37%	42	267,940	4.0%	649.1	10.2%	12.3x	0.8x	LHB	56,675	1.7%	39.3	15.8x	2.8x
Food & Allied	14,438	14,516	-78.59	-0.54%	21	264,174	3.9%	547.8	8.6%	15.3x	4.2x	RENATA	56,006	1.6%	15.1	19.9x	1.6x
IT	1,844	1,840	+3.57	+0.19%	11	24,323	0.4%	309.1	4.9%	20.5x	1.5x	UNILEVERCL	46,285	1.3%	0.5	79.6x	17.9x
Textile	1,066	1,052	+13.85	+1.32%	58	111,004	1.6%	729.9	11.5%	NM	0.7x	DUTCHBANGL	42,245	1.2%	10.3	9.7x	0.8x
Paper & Printing	4,465	4,261	+204.09	+4.79%	6	20,173	0.3%	372.3	5.9%	NM	1.0x	ICB	41,542	1.2%	10.7	NM	1.0x
Tannery	2,008	2,010	-2.19	-0.11%	6	22,375	0.3%	136.0	2.1%	68.8x	1.6x	BXPHARMA	40,775	1.2%	63.5	6.4x	0.8x
Jute	11,973	11,658	+315.32	+2.70%	3	2,636	0.0%	44.9	0.7%	NM	NM	EBL	38,619	1.1%	29.2	5.7x	0.8x
Ceramics	392	396	-3.28	-0.83%	5	17,608	0.3%	259.3	4.1%	NM	1.1x	PUBALIBANK	33,577	1.0%	4.8	4.3x	0.6x
Miscellaneous	4,043	4,052	-8.40	-0.21%	15	219,568	3.3%	268.5	4.2%	82.1x	1.8x	CITYBANK	32,098	0.9%	40.2	3.2x	0.7x
Corporate Bond**	14,938	14,931	+7.47	+0.05%	16	32,979	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,250	0.9%	21.1	16.9x	2.6x
Treasury Bond**	2,051	2,068	-16.82	-0.81%	236	3,285,710	48.8%	2.5	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
APEXSPINN	125.4	+10.0%	58.1	33.7x	2.0x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	SEAPEARL	56.9	-1.7%	239.7	NM	3.4x
MONOSPOOL	104.7	+10.0%	56.0	28.6x	2.3x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	AGNISYSL	27.5	+1.1%	195.9	20.7x	1.6x
APEXTANRY	75.6	+9.9%	21.4	NM	2.3x	BEXIMCO	69,463	4.9%	NM	1.3x	MONNOCERA	92.6	+4.0%	175.2	NM	1.1x
SONALILIFE	60.5	+9.8%	12.9	NM	NM	BATBC	50,233	3.6%	9.1x	2.9x	MAGURAPLEX	95.4	+9.3%	147.0	27.8x	1.3x
TAMIJTEX	131.0	+9.6%	24.1	19.4x	1.3x	WALTONHIL	46,773	3.3%	9.9x	1.1x	BEACHHATCH	49.3	-0.6%	121.1	10.5x	3.0x
AFTABAUTO	37.9	+9.54%	54.4	NM	0.8x	BRACBANK	46,489	3.3%	8.4x	1.4x	ASIATICLAB	43.1	+3.1%	119.3	17.8x	0.8x
MAGURAPLEX	95.4	+9.3%	147.0	27.8x	1x	GP	44,708	3.2%	13.7x	5.7x	BRACBANK	57.5	+0.2%	106.1	8.4x	1.4x
BDAUTOCA	111.2	+7.4%	19.7	NM	15.0x	RENATA	32,968	2.3%	19.9x	1.6x	KBPPWBIL	119.8	-1.5%	91.2	NM	10.0x
ZAHEENSPIN	7.3	+7.4%	22.8	NM	2.7x	BXPHARMA	23,409	1.7%	6.4x	0.8x	MIDLANDBNK	25.9	-	88.2	20.4x	1.7x
SIPLC	48.8	+6.3%	19.5	9.3x	1.8x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	QUASEMIND	38.3	+2.7%	81.6	95.8x	1.3x
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)
EIL	43.1	-7.5%	54.7	35.6x	2.2x	LHB	20,953	1.5%	15.8x	2.8x	MLDYEING	9.4	9.3	7.0	6,850	63.95
SEMLLECMF	11.8	-7.1%	54.1	NM	1x	OLYMPIC	20,496	1.5%	16.9x	2.6x	EASTRN LUB	2,887.7	2,634.3	20.0	11	30.85
UNIONCAP	5.1	-5.6%	1.5	NM	NM	ALARABANK	18,282	1.3%	35.8x	0.8x	FINEFOODS	248.0	236.0	5.0	70	17.10
PHOENIXFIN	3.6	-5.3%	0.6	NM	NM	BEACONPHAR	17,838	1.3%	30.0x	4.0x	MIDLANDBNK	25.0	23.8	3.0	419	10.40
EBL1STMF	4.8	-4.0%	4.3	NM	0.5x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	KDSALTD	44.8	44.8	2.0	200	8.97
PRAGATIINS	47.4	-3.7%	2.0	8.5x	0.8x	ROBI	14,876	1.1%	18.1x	1.9x	MARICO	2,530.0	2,530.0	1.0	3	6.33
RAKCERAMIC	20.5	-3.3%	2.7	NM	1.3x	UTTARABANK	13,699	1.0%	NM	0.6x	ASIATICLAB	45.0	41.9	6.0	122	5.26
BXPHARMA	91.4	-3.3%	63.5	6.4x	0.8x	NBL	13,055	0.9%	NM	8.9x	SPCL	41.0	40.9	2.0	123	5.05
FIRSTFIN	3.0	-3.2%	0.2	NM	NM	BSRMLTD	12,852	0.9%	4.6x	0.5x	SIPLC	45.0	45.0	1.0	100	4.50
AIBL1STIMF	6.0	-3.2%	9.8	NM	0.7x						AOL	16.9	16.9	1.0	160	2.70

* NBFJ 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
MLDYEING	9.4	9.3	63.9	6,850	7
EASTRNLUB	2,887.7	2,634.3	30.8	11	20
FINEFOODS	248.0	236.0	17.1	70	5
MIDLANDBNK	25.0	23.8	10.4	419	3
KDSALTD	44.8	44.8	9.0	200	2
MARICO	2,530.0	2,530.0	6.3	3	1
ASIATICLAB	45.0	41.9	5.3	122	6
SPCL	41.0	40.9	5.1	123	2
SIPLC	45.0	45.0	4.5	100	1
AOL	16.9	16.9	2.7	160	1
LOVELLO	103.7	88.0	2.7	30	2
RELIANCE1	17.7	17.7	2.5	139	3
APEXSPINN	125.3	114.1	2.1	17	2
JANATAINS	26.9	26.9	1.7	65	1
DUTCHBANGL	48.7	48.7	1.4	29	1
BEACONPHAR	102.5	102.5	1.3	13	1
AIL	50.5	50.5	1.3	26	1
PRAGATILIF	93.0	93.0	1.3	14	1
CLICL	49.0	48.9	1.1	22	2
SALAMCRST	20.4	20.4	1.0	50	1
SONARGAON	36.0	36.0	0.7	20	1
SONALIANSH	175.0	175.0	0.7	4	1
Total			179.1		76

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

Important DSE News

LHB

Sinha Fashions Limited, a Corporate Sponsor of the Company, has further informed that it has completed its sale of 30,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated on 29.06.2025.

OLYMPIC

The company has informed that the Board of Directors of the company has decided to purchase Machineries from Local Market for around Tk. 92,53,000.00 (ninety two lac fifty three thousand) to set up new Production Line for Manufacturing of Powder Drink (SIPO Fruity Saline & Orange Powder Drink) with Standard Accessories having total Production Capacity of 4,427 Metric Tons annually (SIPO Fruity Saline 1,682 Metric Tons & Orange Powder Drink 2,745 Metric Tons) and installation and commissioning of the same at their Madanpur Factory, Keodhala, Madanpur Bandar under District-Narayanganj.

CONFIDCEM

In connection with their earlier news disseminated by DSE on 30.06.2025, the company has sent a letter to BSEC for reconsideration to revisit the earlier decision regarding their Rights Issue Proposal. To view the letter, please visit the following link: <https://www.dsebd.org/Annexure/2025/CONFIDCEM-15.07.25.pdf>

MONNOCERA

The company has announced its official partnership as an enlisted vendor for Lenox Corporation USA. The Board of Directors of the company has approved the vendor enlistment agreement with LENOX Corporation USA, for the export of Porcelain and Bone China tableware products to the USA market. Key Points of this Agreement: 1. About the Partnership: Under this agreement, Monno Ceramic will supply Lenox's U.S. operations with an exclusive line of high-quality Bone China and Porcelain dinnerware. The partnership combines Monno's advanced manufacturing capabilities supported by a monthly production capacity of 2 million pieces and compliance with US Federal standards with Lenox's renowned reputation for elegance and innovation. 2. Strategic Benefits: For Lenox: Access to a reliable, scalable, and cost-effective supply chain, reinforcing its commitment to quality and innovation. For Monno: Enhanced market presence in the U.S., alignment with a world-class brand, and an opportunity to demonstrate "Made in Bangladesh" craftsmanship on an international stage. It also ensures the organic growth of the Company. This strategic collaboration is expected to strengthen the Company's Financial position through boosting their export revenue, strengthen foreign currency earnings and support long-term business growth as well as enhancing shareholder value.

LIBRAINFU

A team of DSE visited the factory premises & head office of Libra Infusions Limited at 1/7, Mirpur Industrial Estate (Rupnagar), Section # 2, Mirpur, Dhaka- 1216 on July 14, 2025 and found the operation/production closed.

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.