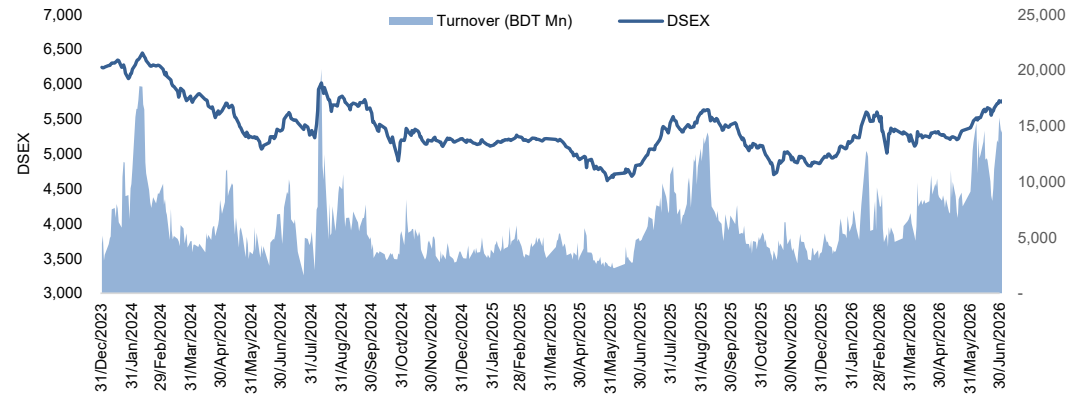


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.25%) gained 15.03 points and closed at 5,926.28. The blue-chip index DS30 (+0.71%), the Shariah-based index DSES (+0.16%), and the large-cap index CDSET (+0.72%) closed at 2,242.90, 1,208.94, and 1,175.50 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 0.67% followed by Pharmaceutical (+0.66%), Bank (+0.61%), Engineering (+0.51%), Telecommunication (+0.26%), Fuel & Power (+0.09%), and Food & Allied (-0.48%), respectively. Block trades contributed 3.1% of the overall market turnover. BSRM Steels Limited (+2.3%) was the most traded share with a turnover of BDT 374 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,926.28	5,911.24	+15.03	+0.25%	+21.8%
DS30	2,242.90	2,227.10	+15.80	+0.71%	+21.0%
DSES	1,208.94	1,207.04	+1.90	+0.16%	+20.8%
CDSET	1,175.50	1,167.11	+8.39	+0.72%	+17.0%

	Advanced	Declined	Unchanged	Total
All Category	131	218	51	400
A Category (Equity)	84	100	20	204
B Category (Equity)	14	57	3	74
N Category (Equity)	0	1	0	1
Z Category (Equity)	33	60	28	121
Mutual Funds	18	4	12	34
Corporate Bonds	2	2	1	5
Treasury Bonds	2	6	0	8

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,122,787	7,107,726	+0.2%
	Mn USD	57,700	57,578	
Turnover	Mn BDT	15,159	16,513	-8.2%
	Mn USD	123	134	
Volume	Mn Shares	417	465	-10.3%
No. of Trade		338,485	356,667	-5.1%

* Average Interbank Exchange Rate is BDT 123.44 as of Jul 14, 2026

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Figure: Sectorial Turnover (BDT Mn)

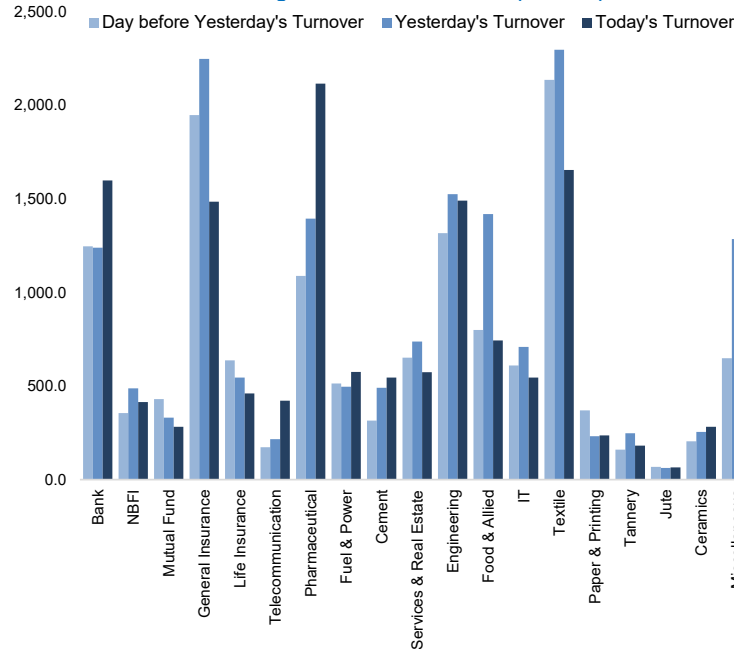
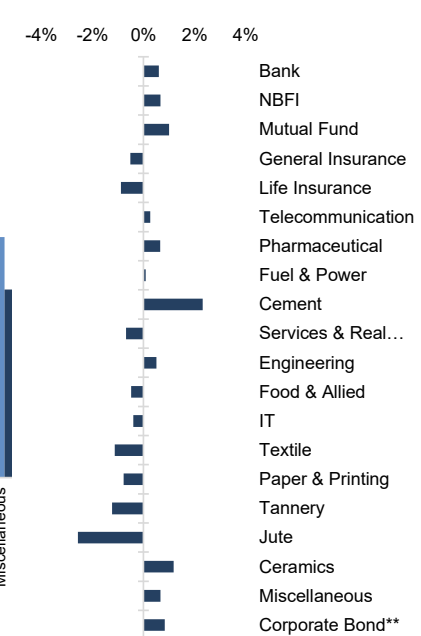


Figure: Sectorial Mcap Change



Market PE 13.9x

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	1,588	1,578	+9.58	+0.61%	36	756,663	10.6%	1,598.3	10.9%	7.1x	0.8x	GP	347,702	9.3%	65.5	9.9x	6.2x
NBFI	1,194	1,186	+7.91	+0.67%	23	113,579	1.6%	414.8	2.8%	NM	1.2x	SQURPHARMA	199,363	5.3%	201.5	7.7x	1.3x
Mutual Fund	622	616	+6.17	+1.00%	36	29,973	0.4%	282.6	1.9%	NM	0.5x	ROBI	174,423	4.7%	287.7	16.7x	2.4x
General Insurance	4,474	4,497	-23.00	-0.51%	43	126,405	1.8%	1,484.5	10.1%	20.3x	1.8x	BRACBANK	149,509	4.0%	367.7	7.5x	1.3x
Life Insurance	2,021	2,039	-17.99	-0.88%	15	56,982	0.8%	460.6	3.1%	NM	NM	WALTONHIL	135,221	3.6%	18.5	13.5x	1.1x
Telecommunication	4,770	4,757	+12.51	+0.26%	3	553,473	7.8%	421.7	2.9%	11.5x	3.8x	BATBC	120,852	3.2%	43.4	25.4x	2.2x
Pharmaceutical	3,279	3,257	+21.37	+0.66%	34	618,868	8.7%	2,114.9	14.4%	11.2x	1.6x	MARICO	86,127	2.3%	19.2	7.5x	29.7x
Fuel & Power	1,204	1,203	+1.09	+0.09%	23	317,891	4.5%	574.5	3.9%	10.2x	0.6x	UPGDCL	75,998	2.0%	18.1	8.2x	1.6x
Cement	2,318	2,266	+52.64	+2.32%	7	109,076	1.5%	545.0	3.7%	25.3x	2.4x	LHB	71,657	1.9%	336.9	14.8x	3.6x
Services & Real Estate	1,225	1,233	-8.45	-0.69%	9	66,649	0.9%	572.9	3.9%	27.1x	0.5x	BXPHARMA	69,504	1.9%	276.9	8.0x	1.2x
Engineering	2,873	2,858	+14.46	+0.51%	42	322,002	4.5%	1,489.2	10.1%	18.6x	0.9x	PUBALIBANK	58,565	1.6%	17.8	5.2x	0.8x
Food & Allied	12,862	12,924	-61.67	-0.48%	21	234,809	3.3%	743.7	5.1%	39.6x	3.5x	CITYBANK	55,631	1.5%	267.0	3.8x	0.8x
IT	2,657	2,667	-10.58	-0.40%	11	35,179	0.5%	544.7	3.7%	45.7x	2.1x	RENATA	54,229	1.5%	24.1	19.9x	1.5x
Textile	1,420	1,436	-16.18	-1.13%	58	147,708	2.1%	1,653.4	11.3%	NM	1.0x	DUTCHBANGL	51,462	1.4%	160.9	4.5x	0.8x
Paper & Printing	5,040	5,079	-39.19	-0.77%	6	23,606	0.3%	236.8	1.6%	NM	1.6x	ISLAMIBANK	51,359	1.4%	9.3	NM	0.7x
Tannery	2,199	2,227	-27.44	-1.23%	6	25,539	0.4%	182.0	1.2%	NM	1.6x	ICB	42,149	1.1%	32.8	NM	1.6x
Jute	14,002	14,371	-369.47	-2.57%	3	3,054	0.0%	64.6	0.4%	NM	1.9x	EBL	40,270	1.1%	119.0	4.7x	0.7x
Ceramics	515	509	+6.05	+1.19%	5	23,273	0.3%	282.3	1.9%	NM	1.5x	UNILEVERCL	39,611	1.1%	5.9	50.9x	16.8x
Miscellaneous	2,636	2,619	+17.52	+0.67%	15	143,145	2.0%	1,004.7	6.8%	56.0x	1.1x	POWERGRID	38,289	1.0%	10.5	9.5x	0.3x
Corporate Bond**	18,894	18,737	+156.17	+0.83%	16	41,800	0.6%	1.8	0.0%	NM	NM	BSRMSTEEL	37,896	1.0%	374.1	6.2x	1.0x
Treasury Bond**	2,198	2,196	+2.05	+0.09%	232	3,376,980	47.4%	11.7	0.1%	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
ACIFORMULA	173.3	+10.0%	289.2	23.2x	2.1x	SQURPHARMA	111,344	7.1%	7.7x	1.3x	BSRMSTEEL	100.8	+2.3%	374.1	6.2x	1.0x
ARAMITCEM	12.8	+7.6%	5.4	NM	NM	BRACBANK	80,480	5.1%	7.5x	1.3x	BRACBANK	65.3	+0.8%	367.7	7.5x	1.3x
RENWICKJA	972.4	+7.5%	4.8	NM	NM	ISLAMIBANK	51,266	3.3%	NM	0.7x	MALEKSPIN	44.7	-1.8%	357.5	7.9x	0.7x
PHARMAID	661.6	+7.5%	104.5	26.6x	4.3x	BXPHARMA	48,563	3.1%	8.0x	1.2x	LHB	61.7	+2.7%	336.9	14.8x	3.6x
AIBL1STIMF	5.9	+7.3%	23.4	NM	0.6x	WALTONHIL	44,501	2.8%	13.5x	1.1x	BSC	129.4	+1.3%	301.7	6.9x	1.1x
ISLAMICFIN	11.8	+6.31%	23.4	NM	8.1x	PUBALIBANK	39,900	2.5%	5.2x	0.8x	ACIFORMULA	173.3	+10.0%	289.2	23.2x	2.1x
ORIONINFU	309.0	+6.1%	166.0	NM	19x	CITYBANK	38,736	2.5%	3.8x	0.8x	ROBI	33.3	+1.2%	287.7	16.7x	2.4x
PARAMOUNT	67.0	+6.0%	85.8	30.2x	2.3x	GP	34,770	2.2%	9.9x	6.2x	BXPHARMA	155.8	+0.3%	276.9	8.0x	1.2x
DBH1STMF	5.3	+6.0%	11.7	NM	0.6x	BATBC	31,965	2.0%	25.4x	2.2x	LOVELLO	74.9	-2.3%	267.8	24.5x	5.6x
BSRMLTD	113.2	+5.1%	205.7	5.2x	0.6x	EBL	27,609	1.8%	4.7x	0.7x	CITYBANK	31.8	+1.3%	267.0	3.8x	0.8x
						RENATA	26,415	1.7%	19.9x	1.5x						
						LHB	26,234	1.7%	14.8x	3.6x						
						PRIMEBANK	23,371	1.5%	4.1x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	OLYMPIC	20,157	1.3%	17.0x	2.4x	BRACBANK	64.8	64.2	19.0	2,695	173.74
JUTESPINN	227.8	-7.5%	5.5	NM	NM	UTTARABANK	18,031	1.1%	NM	0.8x	ALARABANK	16.0	16.0	3.0	3,588	57.41
APOLOISPAT	2.9	-6.5%	2.4	NM	0x	BSRMLTD	17,873	1.1%	5.2x	0.6x	IPDC	34.0	32.0	3.0	957	32.44
SONARGAON	88.0	-5.4%	40.8	NM	3.0x	ROBI	17,442	1.1%	16.7x	2.4x	SUNLIFEINS	80.4	73.0	2.0	415	30.41
DGIC	34.8	-5.4%	40.8	NM	3.0x	BEXIMCO	17,288	1.1%	NM	0.3x	ASIATICLAB	150.0	150.0	1.0	200	30.00
SAIFPOWER	9.5	-5.0%	14.7	27.1x	0.6x	BEACONPHAR	15,851	1.0%	18.1x	3.4x	TRUSTBANK	16.2	16.2	2.0	1,000	16.20
APEXTANRY	108.2	-4.9%	23.4	NM	0.5x	ALARABANK	15,741	1.0%	19.2x	0.8x	NAVANAPHAR	79.5	65.7	5.0	170	13.28
ATLASBANG	93.5	-4.7%	4.8	NM	0.8x						SIPLC	105.0	105.0	1.0	100	10.50
DSHGARME	161.5	-4.6%	41.1	NM	1.0x						MALEKSPIN	46.0	42.0	2.0	221	10.08
NAHEEACP	38.0	-4.5%	54.5	NM	3.2x						CITYGENINS	97.6	97.5	3.0	103	10.05
FAMILYTEX	2.3	-4.2%	1.6	NM	0.2x											
						* 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										

* 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
BRACBANK	64.8	64.2	173.7	2,695	19
ALARABANK	16.0	16.0	57.4	3,588	3
IPDC	34.0	32.0	32.4	957	3
SUNLIFEINS	80.4	73.0	30.4	415	2
ASIATICLAB	150.0	150.0	30.0	200	1
TRUSTBANK	16.2	16.2	16.2	1,000	2
NAVANAPHAR	79.5	65.7	13.3	170	5
SIPLC	105.0	105.0	10.5	100	1
MALEKSPIN	46.0	42.0	10.1	221	2
CITYGENINS	97.6	97.5	10.0	103	3
FINEFOODS	469.0	468.0	9.6	20	2
GP	240.0	240.0	8.1	34	2
LOVELLO	79.0	76.5	6.9	89	4
GQBALLPEN	682.3	600.0	6.8	11	3
SHARPIND	27.4	27.4	6.0	219	1
LHB	56.0	55.5	5.1	92	4
DOMINAGE	75.5	74.5	4.3	57	2
DSHGARME	167.5	166.0	4.0	24	2
NAHEEACP	38.2	38.2	3.8	100	3
BDTHAIFOOD	26.5	23.0	3.6	150	2
EHL	100.0	100.0	3.2	32	2
BSC	128.2	128.2	2.6	20	1
Total			474.4		100

Important DSE News

PADMALIFE

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 17.09.2026, Time: 11:00 AM, Venue: Physical presence at Padma Life Tower, (Top Floor) 115, Kazi Nazrul Islam Avenue, Banglamotor, Dhaka -1000. Record Date: 06.08.2026.

ISLAMICFIN

(Q2 Un-audited): EPS was Tk. 0.87 for April - June 2026 as against Tk. (0.45) for April - June 2025; EPS was Tk. (0.06) for January - June 2026 as against Tk. (1.07) for January - June 2025; NOCFPS was Tk. 0.53 for January - June 2026 as against Tk. 0.08 for January - June 2025. NAV per share was Tk. 2.33 as on June 30, 2026 and Tk. 2.38 as on December 31, 2025.

GP

The Board of Directors of the company has declared Interim Cash Dividend for the year 2026 at the rate of 105% of the paid-up capital of the Company which represents 100% of the Profit after Tax for the six-month period ended on 30 June 2026 (BDT 10.50 per share of BDT 10 each), out of the audited net profits of the Company for the six-month period ended 30 June 2026. Record date for entitlement of Interim Cash Dividend is August 12, 2026. Accordingly, the Board of Directors has reported audited Q2 Financials as follows: EPS was Tk. 5.62 for April-June 2026 as against Tk. 6.51 for April-June 2025; EPS was Tk. 10.52 for January-June 2026 as against Tk. 11.21 for January-June 2025. NOCFPS was Tk. 22.27 for January-June 2026 as against Tk. 26.94 for January-June 2025. NAV per share was Tk. 41.51 as on June 30, 2026 and Tk. 42.15 as on June 30, 2025.

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
PADMALIFE		0.0%	0.0%	Record Date	6-Aug-26

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