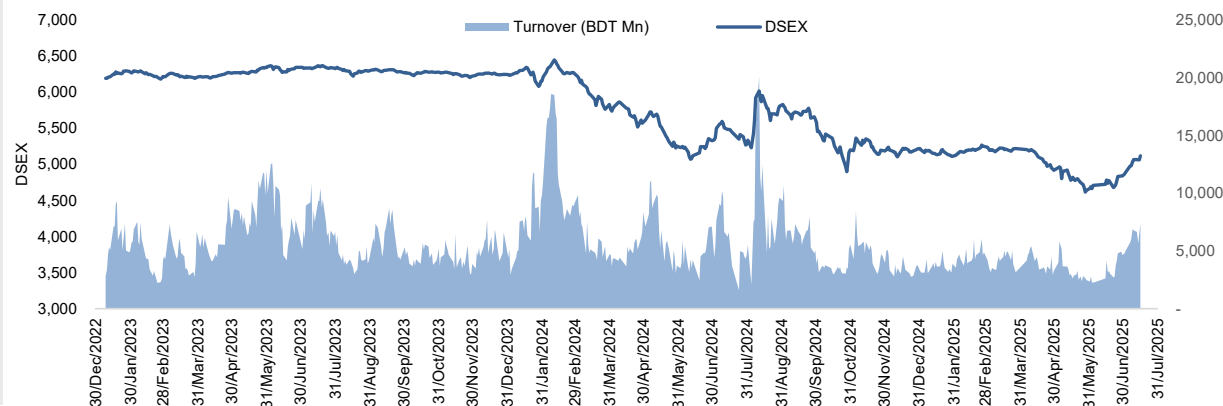


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.08%) gained 54.69 points and closed at 5,116.90. The blue-chip index DS30 (+1.58%), the Shariah-based index DSES (+0.87%), and the large-cap index CDSET (+0.86%) closed at 1,920.77, 1,112.06, and 1,034.39 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 3.41% followed by Bank (+1.13%), Pharmaceutical (+1.07%), Food & Allied (+0.86%), Engineering (+0.76%), Fuel & Power (+0.73%), and Telecommunication (-0.01%), respectively. Block trades contributed 3.2% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (-1.6%) was the most traded share with a turnover of BDT 228 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,116.90	5,062.20	+54.69	+1.08%	-1.9%
DS30	1,920.77	1,890.93	+29.84	+1.58%	-1.0%
DSES	1,112.06	1,102.47	+9.59	+0.87%	-4.9%
CDSET	1,034.39	1,025.55	+8.84	+0.86%	-3.0%

	Advanced	Declined	Unchanged	Total
All Category	267	79	51	397
A Category (Equity)	151	42	24	217
B Category (Equity)	58	21	4	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	58	16	23	97
Mutual Funds	15	6	15	36
Corporate Bonds	2	0	0	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,813,473	6,776,310	+0.5%
	Mn USD	56,341	56,033	
Turnover	Mn BDT	7,344	6,537	+12.3%
	Mn USD	61	54	
Volume	Mn Shares	277	233	+18.9%
No. of Trade		210,493	205,628	+2.4%

* Average Interbank Exchange Rate is BDT 120.93 as of Jul 16, 2025

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Figure: Sectorial Turnover (BDT Mn)

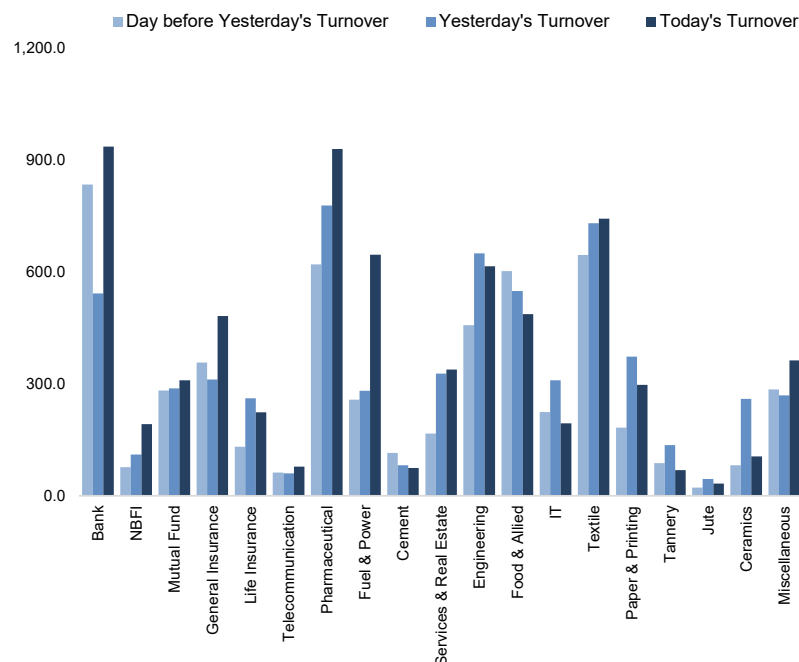
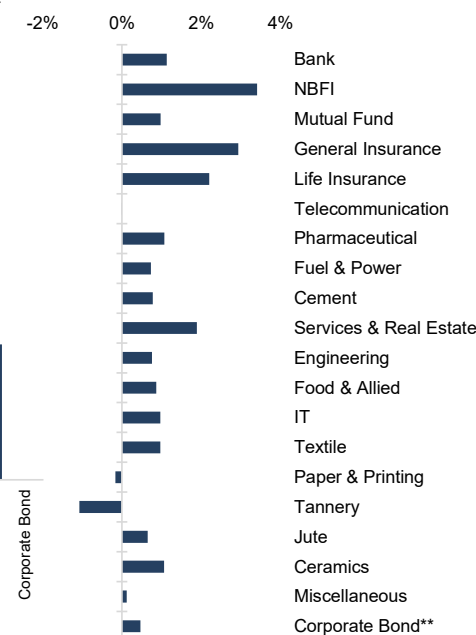


Figure: Sectorial Mcap Change



Market PE 14.5x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, 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	1,458	1,442	+16.32	+1.13%	36	690,011	10.2%	934.4	13.1%	32.0x	0.7x	GP	400,769	11.6%	41.1	13.7x	5.6x
NBFI	1,044	1,010	+34.46	+3.41%	23	99,487	1.5%	191.8	2.7%	NM	NM	SQURPHARMA	188,903	5.5%	71.7	8.0x	1.4x
Mutual Fund	655	649	+6.34	+0.98%	37	30,117	0.4%	309.1	4.3%	NM	0.6x	BATBC	153,198	4.4%	44.8	9.3x	2.9x
General Insurance	2,676	2,600	+76.27	+2.93%	43	76,367	1.1%	481.5	6.8%	12.8x	1.1x	ROBI	131,472	3.8%	32.1	18.2x	1.9x
Life Insurance	1,765	1,727	+38.01	+2.20%	15	46,936	0.7%	223.7	3.1%	NM	NM	WALTONHIL	128,654	3.7%	6.3	10.0x	1.1x
Telecommunication	4,746	4,747	-0.44	-0.01%	3	556,538	8.2%	78.4	1.1%	14.7x	3.5x	BRACBANK	119,256	3.4%	224.5	8.8x	1.4x
Pharmaceutical	2,917	2,886	+30.84	+1.07%	34	552,914	8.2%	928.3	13.1%	12.8x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,107	1,099	+8.00	+0.73%	23	293,147	4.3%	645.3	9.1%	18.5x	0.6x	MARICO	82,174	2.4%	6.4	13.9x	10.9x
Cement	1,888	1,873	+14.56	+0.78%	7	89,970	1.3%	74.6	1.0%	21.5x	1.9x	BERGERPBL	74,086	2.1%	8.4	20.8x	4.5x
Services & Real Estate	982	964	+18.27	+1.89%	9	54,033	0.8%	337.9	4.8%	24.9x	0.4x	UPGDCL	72,288	2.1%	18.3	6.2x	1.7x
Engineering	2,393	2,375	+17.95	+0.76%	42	269,964	4.0%	614.1	8.6%	12.4x	0.8x	LHB	57,140	1.7%	37.1	15.9x	2.9x
Food & Allied	14,563	14,438	+124.82	+0.86%	21	266,458	3.9%	486.3	6.8%	15.4x	4.2x	RENATA	56,224	1.6%	28.8	20.0x	1.6x
IT	1,862	1,844	+17.90	+0.97%	11	24,559	0.4%	193.8	2.7%	20.7x	1.5x	UNILEVERCL	46,457	1.3%	0.5	79.9x	18.0x
Textile	1,076	1,066	+10.31	+0.97%	58	112,078	1.7%	742.2	10.4%	NM	0.8x	ICB	42,929	1.2%	18.7	NM	1.0x
Paper & Printing	4,458	4,465	-7.23	-0.16%	6	20,140	0.3%	296.6	4.2%	NM	1.0x	BXPHARMA	42,916	1.2%	62.0	6.7x	0.9x
Tannery	1,987	2,008	-21.61	-1.08%	6	22,134	0.3%	69.0	1.0%	68.0x	1.6x	DUTCHBANGL	41,955	1.2%	11.1	9.7x	0.8x
Jute	12,051	11,973	+77.60	+0.65%	3	2,653	0.0%	32.9	0.5%	NM	NM	EBL	38,938	1.1%	24.3	5.7x	0.8x
Ceramics	397	392	+4.17	+1.06%	5	17,795	0.3%	105.7	1.5%	NM	1.1x	PUBALIBANK	33,577	1.0%	6.0	4.3x	0.6x
Miscellaneous	4,048	4,043	+4.90	+0.12%	15	219,834	3.2%	362.7	5.1%	82.2x	1.8x	CITYBANK	32,554	0.9%	40.0	3.2x	0.7x
Corporate Bond**	15,008	14,938	+69.52	+0.47%	16	33,133	0.5%	0.4	0.0%	NM	NM	OLYMPIC	31,330	0.9%	42.7	16.9x	2.6x
Treasury Bond**	2,056	2,051	+4.96	+0.24%	236	3,292,716	48.6%	0.7	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
PRIMEINSUR	32.7	+9.7%	14.5	17.1x	1.5x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	SEAPEARL	56.0	-1.6%	228.0	NM	3.4x
1STPRIMFMF	23.6	+9.3%	74.8	NM	2.2x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	BRACBANK	59.9	+4.2%	224.5	8.8x	1.4x
PDL	6.4	+8.5%	7.3	NM	0.5x	BEXIMCO	69,463	4.9%	NM	1.3x	EASTRNLUB	3,020.2	+4.6%	218.6	72.1x	15.7x
OAL	7.8	+8.3%	8.2	NM	0.8x	BATBC	50,233	3.6%	9.3x	2.9x	ASIATICLAB	44.5	+3.2%	152.0	18.4x	0.8x
PRAGATILIF	103.8	+8.0%	14.6	NM	NM	WALTONHIL	46,773	3.3%	10.0x	1.1x	KBPWBIL	120.2	+0.3%	149.3	NM	10.1x
QUEENSOUTH	13.6	+7.94%	59.4	30.9x	0.9x	BRACBANK	46,489	3.3%	8.8x	1.4x	INTRACO	22.7	+7.1%	132.9	20.1x	1.7x
TALLUSPIN	5.5	+7.8%	1.6	NM	0x	GP	44,708	3.2%	13.7x	5.6x	MIDLANDBNK	26.2	+1.2%	123.6	20.6x	1.8x
SAFKOSPINN	12.5	+7.8%	4.0	NM	NM	RENATA	32,968	2.3%	20.0x	1.6x	BSC	94.8	+3.4%	114.3	4.8x	1.0x
WMSHIPYARD	8.9	+7.2%	11.4	NM	0.5x	BXPHARMA	23,409	1.7%	6.7x	0.9x	ACI	206.1	+1.6%	94.1	NM	3.1x
PADMALIFE	25.5	+7.1%	6.0	NM	NM	PUBALIBANK	22,905	1.6%	4.3x	0.6x	TECHNODRUG	33.1	+3.8%	89.5	NM	1.1x
						CITYBANK	21,020	1.5%	3.2x	0.7x						
						LHB	20,953	1.5%	15.9x	2.9x						
						OLYMPIC	20,496	1.5%	16.9x	2.6x						
						ALARABANK	18,282	1.3%	35.3x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
GQBALLPEN	199.8	-5.8%	28.1	NM	1.5x	BEACONPHAR	17,838	1.3%	30.1x	4.0x	ASIATICLAB	46.0	41.0	4.0	1,600	67.23
RAHIMTEXT	160.3	-5.6%	21.5	NM	6x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	EASTRNLUB	2,910.0	2,810.5	6.0	13	37.46
DAFODILCOM	58.1	-4.1%	13.5	NM	4.4x	ROBI	14,876	1.1%	18.2x	1.9x	FINEFOODS	248.0	242.0	3.0	133	32.83
AFTABAUTO	36.4	-4.0%	20.3	NM	0.8x	UTTARABANK	13,699	1.0%	NM	0.6x	MLDYEING	9.4	9.4	2.0	2,150	20.21
ICBEPMF1S1	5.1	-3.8%	1.1	NM	0.9x	NBL	13,055	0.9%	NM	8.9x	SQURPHARMA	211.2	211.2	1.0	83	17.42
BDAUTOCA	107.2	-3.6%	11.2	NM	14.5x	BSRMLTD	12,852	0.9%	4.6x	0.5x	AL-HAJTEX	136.1	127.0	7.0	73	9.53
TAMIJTEX	126.4	-3.5%	10.4	18.7x	1.3x						EIL	47.4	45.0	7.0	144	6.59
NCCBLMF1	5.5	-3.5%	0.9	NM	0.6x						EGEN	23.0	23.0	1.0	200	4.60
STYLECRAFT	73.0	-3.3%	18.7	NM	12.6x						KAY&QUE	230.0	206.7	3.0	15	3.26
NORTHERN	105.0	-3.2%	0.2	NM	1.3x						RELIANCE1	19.0	17.1	3.0	176	3.21

* 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
ASIATICLAB	46.0	41.0	67.2	1,600	4
EASTRNLAB	2,910.0	2,810.5	37.5	13	6
FINEFOODS	248.0	242.0	32.8	133	3
MLDYEING	9.4	9.4	20.2	2,150	2
SQURPHARMA	211.2	211.2	17.4	83	1
AL-HAJTEX	136.1	127.0	9.5	73	7
EIL	47.4	45.0	6.6	144	7
EGEN	23.0	23.0	4.6	200	1
KAY&QUE	230.0	206.7	3.3	15	3
RELIANCE1	19.0	17.1	3.2	176	3
KDSALTD	45.8	42.5	2.5	55	2
FAREASTLIF	30.0	30.0	2.3	76	1
FEDERALINS	19.4	19.4	1.9	100	2
SHEPHERD	18.4	18.4	1.8	100	2
AOL	16.6	16.6	1.7	100	1
PRAGATILIF	104.0	104.0	1.6	15	1
ADNTEL	77.2	77.2	1.5	20	2
CITYGENINS	42.7	42.7	1.4	32	1
SONALIANS	196.0	196.0	1.4	7	1
JANATAINS	26.9	26.9	1.3	50	1
GHAIL	13.0	13.0	1.3	100	1
UNIONINS	32.7	32.6	1.2	35	2
Total			234.3		71

Important DSE News
ICBIBANK

(Q2 Un-audited): EPS was Tk. (0.28) for April-June 2025 as against Tk. (0.21) for April-June 2024; EPS was Tk. (0.42) for January-June 2025 as against Tk. (0.42) for January-June 2024. NOCFPS was Tk. 1.38 for January-June 2025 as against Tk. (0.26) for January-June 2024. NAV per share was Tk. (21.21) as on June 30, 2025 and Tk. (19.78) as on June 30, 2024.

RENATA

The company has informed that the Rajendrapur General Facility of the company has received European Union Good Manufacturing Practice (EU GMP) certification following a comprehensive audit by European authorities.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ISLAMICFIN		0.0%	0.0%	Record Date	28-Jul-25
ASIAINS		0.0%	10.0%	Record Date	29-Jul-25
POPULARLIF		0.0%	20.0%	Record Date	29-Jul-25

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