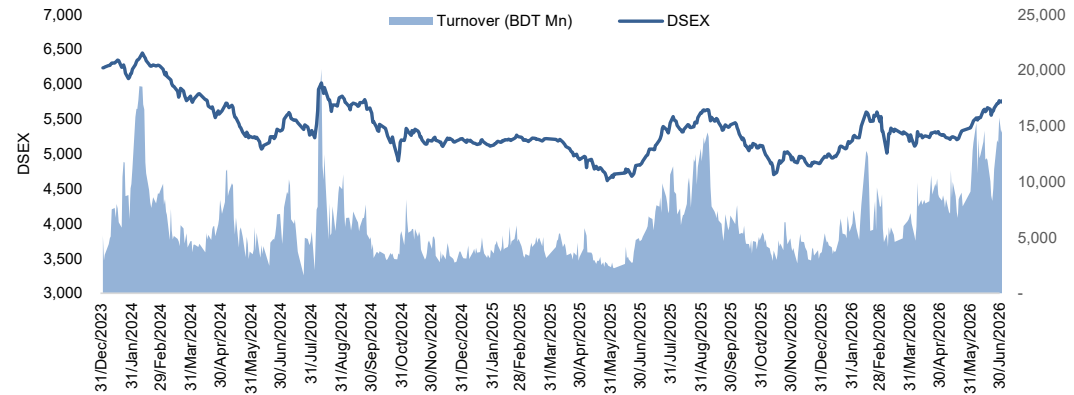


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.44%) lost 25.92 points and closed at 5,900.36. The blue-chip index DS30 (-0.68%), the Shariah-based index DSES (-0.17%), and the large-cap index CDSET (-0.45%) closed at 2,227.63, 1,206.86, and 1,170.16 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.93% followed by NBFi (-0.91%), Engineering (-0.82%), Food & Allied (-0.53%), Telecommunication (-0.42%), Pharmaceutical (-0.08%), and Bank (-0.04%), respectively. Block trades contributed 2.5% of the overall market turnover. Techno Drugs Ltd. (+9.8%) was the most traded share with a turnover of BDT 477 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,900.36	5,926.28	-25.92	-0.44%	+21.3%
DS30	2,227.63	2,242.90	-15.28	-0.68%	+20.2%
DSES	1,206.86	1,208.94	-2.08	-0.17%	+20.6%
CDSET	1,170.16	1,175.50	-5.34	-0.45%	+16.5%

	Advanced	Declined	Unchanged	Total
All Category	103	240	52	395
A Category (Equity)	42	142	17	201
B Category (Equity)	17	50	6	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	44	48	29	121
Mutual Funds	4	19	11	34
Corporate Bonds	0	1	2	3
Treasury Bonds	1	5	0	6

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,108,834	7,122,787	-0.2%
	Mn USD	57,488	57,601	
Turnover	Mn BDT	11,182	15,159	-26.2%
	Mn USD	90	123	
Volume	Mn Shares	335	417	-19.7%
No. of Trade		271,376	338,485	-19.8%

* Average Interbank Exchange Rate is BDT 123.66 as of Jul 16, 2026

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Figure: Sectorial Turnover (BDT Mn)

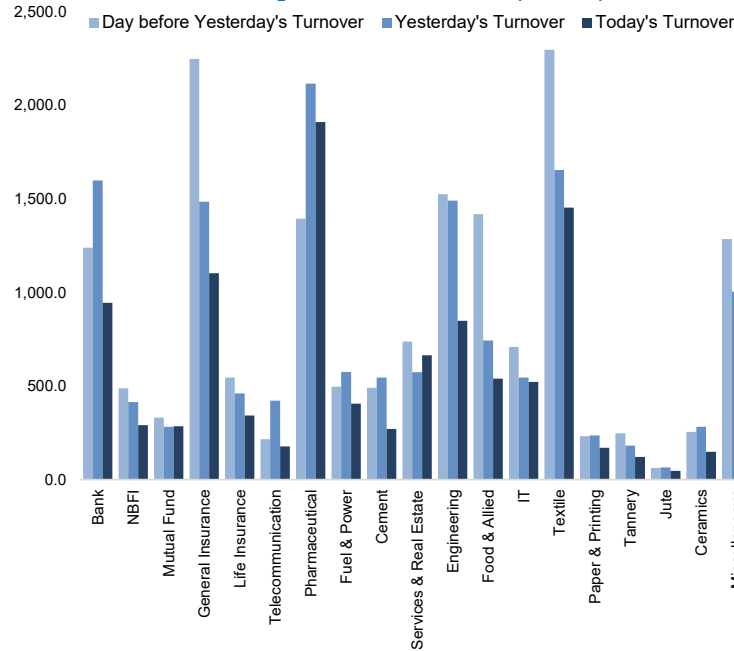
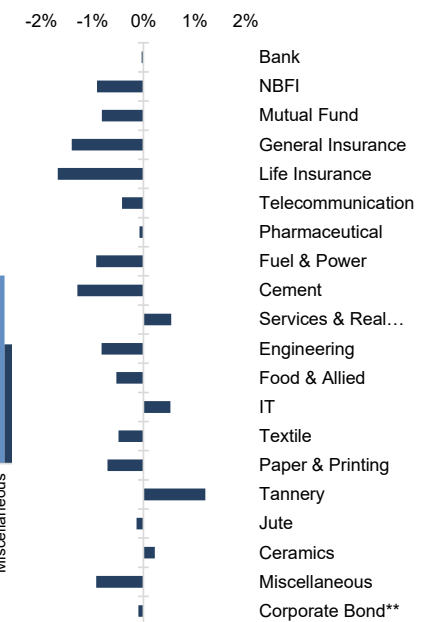


Figure: Sectorial Mcap Change



Market PE 13.8x

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	1,587	1,588	-0.57	-0.04%	36	756,390	10.6%	944.8	8.7%	7.1x	0.8x	GP	347,702	9.4%	30.6	9.9x	6.2x
NBFI	1,184	1,194	-10.83	-0.91%	23	112,549	1.6%	290.1	2.7%	NM	1.2x	SQURPHARMA	199,451	5.4%	92.3	7.7x	1.3x
Mutual Fund	617	622	-5.07	-0.81%	36	29,729	0.4%	284.3	2.6%	NM	0.5x	ROBI	172,852	4.7%	115.5	16.6x	2.4x
General Insurance	4,411	4,474	-62.80	-1.40%	43	124,631	1.8%	1,101.6	10.1%	20.1x	1.7x	BRACBANK	147,906	4.0%	179.0	7.4x	1.3x
Life Insurance	1,988	2,021	-33.96	-1.68%	15	56,025	0.8%	343.0	3.1%	NM	NM	WALTONHIL	134,788	3.6%	17.3	13.4x	1.1x
Telecommunication	4,750	4,770	-19.99	-0.42%	3	551,154	7.7%	176.9	1.6%	11.4x	3.8x	BATBC	120,258	3.2%	38.0	25.3x	2.2x
Pharmaceutical	3,276	3,279	-2.51	-0.08%	34	618,394	8.7%	1,909.9	17.5%	11.2x	1.6x	MARICO	86,483	2.3%	11.4	7.5x	29.8x
Fuel & Power	1,193	1,204	-11.16	-0.93%	23	314,945	4.4%	406.3	3.7%	10.1x	0.6x	UPGDCL	74,549	2.0%	17.2	8.0x	1.6x
Cement	2,288	2,318	-29.97	-1.29%	7	107,666	1.5%	270.0	2.5%	24.9x	2.3x	LHB	70,495	1.9%	188.2	14.6x	3.5x
Services & Real Estate	1,232	1,225	+6.68	+0.55%	9	67,012	0.9%	664.3	6.1%	27.3x	0.5x	BERGERPBL	69,068	1.9%	5.3	18.6x	3.5x
Engineering	2,849	2,873	-23.48	-0.82%	42	319,370	4.5%	847.3	7.8%	18.5x	0.9x	PUBALIBANK	58,252	1.6%	14.1	5.2x	0.8x
Food & Allied	12,794	12,862	-68.26	-0.53%	21	233,563	3.3%	539.5	4.9%	39.4x	3.5x	CITYBANK	55,281	1.5%	164.5	3.8x	0.8x
IT	2,671	2,657	+14.06	+0.53%	11	35,365	0.5%	522.3	4.8%	46.0x	2.2x	RENATA	54,584	1.5%	36.4	20.0x	1.5x
Textile	1,413	1,420	-6.92	-0.49%	58	146,988	2.1%	1,452.3	13.3%	NM	1.0x	ISLAMIBANK	52,003	1.4%	5.0	NM	0.8x
Paper & Printing	5,005	5,040	-35.48	-0.70%	6	23,440	0.3%	170.7	1.6%	NM	1.6x	DUTCHBANGL	51,767	1.4%	108.1	4.6x	0.8x
Tannery	2,226	2,199	+26.68	+1.21%	6	25,849	0.4%	120.9	1.1%	NM	1.6x	ICB	41,542	1.1%	16.6	NM	1.6x
Jute	13,983	14,002	-18.62	-0.13%	3	3,050	0.0%	46.8	0.4%	NM	1.9x	EBL	40,106	1.1%	57.9	4.7x	0.7x
Ceramics	516	515	+1.14	+0.22%	5	23,324	0.3%	148.0	1.4%	NM	1.5x	UNILEVERCL	39,721	1.1%	2.3	51.1x	16.8x
Miscellaneous	2,612	2,636	-24.44	-0.93%	15	141,818	2.0%	637.5	5.8%	55.5x	1.1x	POWERGRID	37,923	1.0%	6.6	9.4x	0.3x
Corporate Bond**	18,875	18,894	-18.31	-0.10%	16	41,760	0.6%	0.1	0.0%	NM	NM	BSRMSTEEL	37,219	1.0%	116.9	6.1x	1.0x
Treasury Bond**	2,200	2,198	+1.80	+0.08%	232	3,379,751	47.5%	24.9	0.2%	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
TECHNODRUG	46.9	+9.8%	477.0	31.3x	1.5x	SQURPHARMA	111,394	7.1%	7.7x	1.3x	TECHNODRUG	46.9	+9.8%	477.0	31.3x	1.5x
GHCL	22.9	+9.6%	18.7	NM	0.3x	BRACBANK	79,618	5.1%	7.4x	1.3x	SAPORTL	53.2	+1.7%	350.5	25.1x	1.5x
ILFSL	1.2	+9.1%	2.7	NM	NM	ISLAMIBANK	51,909	3.3%	NM	0.8x	MALEKSPIN	43.7	-2.2%	243.9	7.7x	0.7x
PLFSL	1.3	+8.3%	0.8	NM	NM	BXPBARMA	47,783	3.0%	7.9x	1.1x	FEKDIL	25.0	+2.5%	208.3	NM	1.3x
ALARABANK	17.3	+7.5%	5.8	20.6x	0.8x	WALTONHIL	44,359	2.8%	13.4x	1.1x	LOVELLO	73.8	-1.5%	194.5	24.2x	5.5x
FARCHEM	23.0	+6.98%	69.3	NM	0.8x	PUBALIBANK	39,687	2.5%	5.2x	0.8x	LHB	60.7	-1.6%	188.2	14.6x	3.5x
AIBL1STIMF	6.3	+6.8%	56.9	NM	1x	CITYBANK	38,492	2.5%	3.8x	0.8x	BRACBANK	64.6	-1.1%	179.0	7.4x	1.3x
PREMIERBAN	5.3	+6.0%	15.5	NM	0.4x	GP	34,770	2.2%	9.9x	6.2x	BSC	126.4	-2.3%	167.6	6.7x	1.1x
NEWLINE	5.6	+5.7%	3.1	NM	0.2x	BATBC	31,808	2.0%	25.3x	2.2x	CITYBANK	31.6	-0.6%	164.5	3.8x	0.8x
MEGHNAPEP	88.3	+5.0%	25.8	NM	1.3x	EBL	27,497	1.8%	4.7x	0.7x	NAVANAPHAR	75.1	+2.0%	163.4	12.9x	1.5x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	26,588	1.7%	20.0x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
USMANIAGL	71.7	-9.2%	19.0	NM	1.2x	LHB	25,808	1.6%	14.6x	3.5x	CITYGENINS	97.5	96.7	4.0	692	67.16
BIFC	4.1	-6.8%	1.0	NM	NM	PRIMEBANK	23,219	1.5%	4.1x	0.8x	MEGHNAPEP	81.0	79.0	9.0	388	31.01
ZEALBANGLA	222.5	-4.8%	25.7	NM	4.3x	OLYMPIC	20,020	1.3%	16.8x	2.4x	MARICO	2,720.0	2,720.0	1.0	10	27.20
GQBALLPEN	600.3	-4.8%	25.7	NM	4.3x	UTTARABANK	18,031	1.1%	NM	0.8x	FINEFOODS	480.0	467.0	3.0	51	23.80
SIPLC	108.4	-3.9%	16.3	21.3x	3.6x	ROBI	17,285	1.1%	16.6x	2.4x	SHARPIND	30.6	29.8	4.0	400	12.07
GENNEXT	2.7	-3.6%	1.9	24.5x	0.2x	BSRMLTD	17,273	1.1%	5.0x	0.6x	TRUSTBANK	16.2	16.2	2.0	600	9.72
SONARBAINS	43.5	-3.5%	31.9	89.6x	2.3x	BEXIMCO	16,972	1.1%	NM	0.3x	BSRMSTEEL	101.0	101.0	1.0	90	9.09
ASIATICLAB	133.5	-3.5%	29.3	30.7x	2.3x	ALARABANK	16,914	1.1%	20.6x	0.8x	DBH	46.3	46.3	3.0	195	9.01
BSRMLTD	109.4	-3.4%	73.2	5.0x	0.6x	BEACONPHAR	15,587	1.0%	17.8x	3.3x	APEXSPINN	406.0	404.0	2.0	19	7.88
CNATEX	2.9	-3.3%	2.5	36.3x	NM						LOVELLO	75.8	75.0	2.0	100	7.49

* 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
CITYGENINS	97.5	96.7	67.2	692	4
MEGHNA PET	81.0	79.0	31.0	388	9
MARICO	2,720.0	2,720.0	27.2	10	1
FINEFOODS	480.0	467.0	23.8	51	3
SHARPIND	30.6	29.8	12.1	400	4
TRUSTBANK	16.2	16.2	9.7	600	2
BSRMSTEEL	101.0	101.0	9.1	90	1
DBH	46.3	46.3	9.0	195	3
APEXSPINN	406.0	404.0	7.9	19	2
LOVELLO	75.8	75.0	7.5	100	2
NAVANAPHAR	80.9	79.9	7.3	91	2
DOMINAGE	79.3	73.0	7.0	94	3
ISLAMIINS	70.4	65.0	6.9	106	5
BRACBANK	67.8	67.8	6.8	100	1
LHB	63.2	61.5	6.7	108	5
BAYLEASING	4.8	4.4	4.1	914	2
CITYBANK	34.7	34.7	3.5	100	2
MALEKSPIN	45.2	44.8	3.1	69	2
CVOPRL	184.7	182.8	3.1	17	2
SAMORITA	90.0	90.0	2.8	31	1
ITC	52.5	51.9	2.0	39	2
DELTALIFE	93.3	93.3	1.9	20	1
Total			280.9		87

Important DSE News
SIPLC

(Q2 Un-audited): EPS was Tk. 1.55 for April-June 2026 as against Tk. 1.57 for April-June 2025; EPS was Tk. 3.39 for January-June 2026 as against Tk. 3.47 for January-June 2025. NOCFPS was Tk. 6.32 for January-June 2026 as against Tk. 4.00 for January-June 2025. NAV per share was Tk. 30.43 as on June 30, 2026 and Tk. 28.58 as on December 31, 2025.

BIFC

(Q2 Un-audited): EPS was Tk. (1.45) for April - June 2026 as against Tk. (1.47) for April - June 2025; EPS was Tk. (3.26) for January - June 2026 as against Tk. (3.12) for January - June 2025; NOCFPS was Tk. (0.06) for January - June 2026 as against Tk. (0.05) for January - June 2025. NAV per share was Tk. (136.84) as on June 30, 2026 and Tk. (133.58) as on December 31, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ISLAMICFIN		0.0%	0.0%	Record Date	9-Aug-26

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