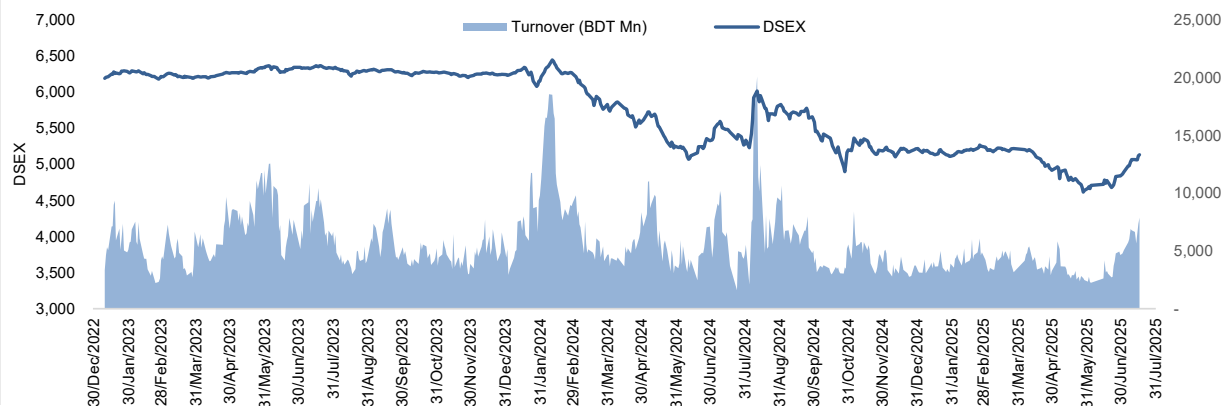


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.30%) gained 15.58 points and closed at 5,132.48. The blue-chip index DS30 (+0.83%), the Shariah-based index DSES (+0.70%), and the large-cap index CDSET (+0.55%) closed at 1,936.66, 1,119.80, and 1,040.13 points, respectively. All the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 1.17% followed by Engineering (+0.85%), Fuel & Power (+0.69%), NBFI (+0.66%), Food & Allied (+0.53%), Bank (+0.43%), and Pharmaceutical (+0.19%), respectively. Block trades contributed 3.8% of the overall market turnover. BRAC Bank Ltd. (+4.7%) was the most traded share with a turnover of BDT 462 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,132.48	5,116.90	+15.58	+0.30%	-1.6%
DS30	1,936.66	1,920.77	+15.90	+0.83%	-0.2%
DSES	1,119.80	1,112.06	+7.74	+0.70%	-4.2%
CDSET	1,040.13	1,034.39	+5.74	+0.55%	-2.4%

	Advanced	Declined	Unchanged	Total
All Category	153	180	63	396
A Category (Equity)	71	113	34	218
B Category (Equity)	32	38	11	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	50	29	18	97
Mutual Funds	9	14	13	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	2	0	2

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,874,983	6,813,473	+0.9%
	Mn USD	56,691	56,184	
Turnover	Mn BDT	7,897	7,344	+7.5%
	Mn USD	65	61	
Volume	Mn Shares	295	277	+6.6%
No. of Trade		225,649	210,493	+7.2%

\* Average Interbank Exchange Rate is BDT 121.27 as of Jul 17, 2025

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Figure: Sectorial Turnover (BDT Mn)

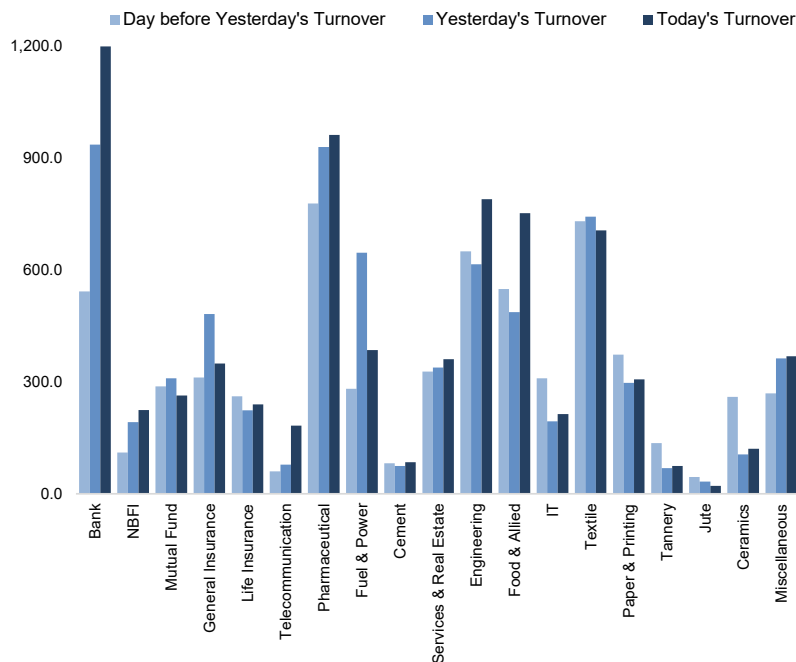
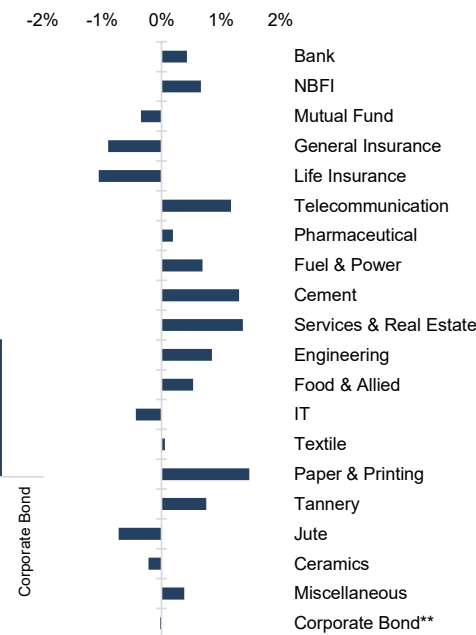


Figure: Sectorial Mcap Change



Market PE 14.6x

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	1,465	1,458	+6.21	+0.43%	36	692,947	10.1%	1,197.5	15.8%	33.4x	0.7x	GP	405,360	11.6%	112.3	13.8x	7.1x
NBFI	1,051	1,044	+6.93	+0.66%	23	100,148	1.5%	224.0	3.0%	NM	NM	SQURPHARMA	188,814	5.4%	42.9	8.0x	1.4x
Mutual Fund	653	655	-2.26	-0.35%	37	30,013	0.4%	262.8	3.5%	NM	0.6x	BATBC	153,792	4.4%	106.7	9.3x	2.9x
General Insurance	2,652	2,676	-24.04	-0.90%	43	75,681	1.1%	348.7	4.6%	12.7x	1.1x	ROBI	133,043	3.8%	50.8	18.4x	1.9x
Life Insurance	1,746	1,765	-18.61	-1.05%	15	46,441	0.7%	239.1	3.1%	NM	NM	WALTONHIL	129,562	3.7%	8.6	10.0x	1.1x
Telecommunication	4,802	4,746	+55.58	+1.17%	3	563,055	8.2%	182.3	2.4%	14.8x	3.9x	BRACBANK	124,831	3.6%	461.8	9.2x	1.5x
Pharmaceutical	2,922	2,917	+5.64	+0.19%	34	553,984	8.1%	960.3	12.6%	12.8x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,114	1,107	+7.61	+0.69%	23	295,164	4.3%	384.7	5.1%	18.6x	0.6x	MARICO	82,593	2.4%	9.2	14.0x	11.0x
Cement	1,913	1,888	+24.66	+1.31%	7	91,145	1.3%	84.4	1.1%	21.8x	2.0x	BERGERPBL	74,852	2.2%	10.9	21.0x	4.6x
Services & Real Estate	996	982	+13.44	+1.37%	9	54,772	0.8%	360.4	4.7%	25.2x	0.4x	UPGDCL	74,085	2.1%	17.2	6.4x	1.8x
Engineering	2,413	2,393	+20.25	+0.85%	42	272,249	4.0%	788.5	10.4%	12.5x	0.8x	LHB	58,417	1.7%	43.6	16.3x	2.9x
Food & Allied	14,640	14,563	+77.61	+0.53%	21	267,878	3.9%	751.0	9.9%	15.5x	4.3x	RENATA	56,660	1.6%	73.0	20.1x	1.6x
IT	1,854	1,862	-8.09	-0.43%	11	24,452	0.4%	213.1	2.8%	20.6x	1.5x	UNILEVERCL	46,931	1.3%	1.2	80.7x	18.2x
Textile	1,077	1,076	+0.62	+0.06%	58	112,143	1.6%	704.9	9.3%	NM	0.8x	ICB	43,450	1.2%	30.9	NM	1.0x
Paper & Printing	4,524	4,458	+65.77	+1.48%	6	20,437	0.3%	305.9	4.0%	NM	1.0x	BXPHARMA	43,362	1.2%	84.2	6.8x	0.9x
Tannery	2,002	1,987	+14.94	+0.75%	6	22,301	0.3%	74.5	1.0%	68.5x	1.6x	DUTCHBANGL	42,148	1.2%	9.3	9.7x	0.8x
Jute	11,963	12,051	-87.16	-0.72%	3	2,633	0.0%	20.9	0.3%	NM	NM	EBL	39,097	1.1%	47.7	5.8x	0.8x
Ceramics	396	397	-0.88	-0.22%	5	17,755	0.3%	120.6	1.6%	NM	1.1x	PUBALIBANK	33,317	1.0%	5.3	4.2x	0.6x
Miscellaneous	4,064	4,048	+15.54	+0.38%	15	220,678	3.2%	368.4	4.9%	82.5x	1.8x	CITYBANK	32,402	0.9%	71.6	3.2x	0.7x
Corporate Bond**	15,003	15,008	-4.08	-0.03%	16	33,124	0.5%	0.3	0.0%	NM	NM	OLYMPIC	31,190	0.9%	26.0	16.9x	2.6x
Treasury Bond**	2,084	2,056	+27.55	+1.34%	236	3,335,279	48.8%	0.8	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
RAHIMAFOOD	122.7	+9.9%	84.9	NM	13.4x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	BRACBANK	62.7	+4.7%	461.8	9.2x	1.5x
KPCL	11.2	+9.8%	14.3	32.9x	0.6x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	SEAPEARL	54.6	-2.5%	179.3	NM	3.3x
KBSCABLES	17.3	+9.5%	43.6	NM	0.6x	BEXIMCO	69,463	4.9%	NM	1.3x	LOVELLO	97.4	+2.1%	154.1	43.9x	7.7x
GSPFINANCE	4.8	+9.1%	2.5	NM	0.4x	BATBC	50,233	3.6%	9.3x	2.9x	BSC	94.5	-0.3%	129.0	4.8x	1.0x
ACMEPL	14.7	+8.9%	92.6	NM	0.9x	WALTONHIL	46,773	3.3%	10.0x	1.1x	GP	300.2	+1.1%	112.3	13.8x	7.1x
PDL	6.9	+7.81%	10.6	NM	0.5x	BRACBANK	46,489	3.3%	9.2x	1.5x	KBPPWBIL	120.8	+0.5%	112.1	NM	10.1x
ARAMITCEM	14.4	+7.5%	3.7	NM	NM	GP	44,708	3.2%	13.8x	7.1x	BATBC	284.8	+0.4%	106.7	9.3x	2.9x
DSHGARME	133.4	+7.0%	52.0	NM	7.2x	RENATA	32,968	2.3%	20.1x	1.6x	PRIMEBANK	25.0	-	106.1	3.6x	0.7x
BBS	11.5	+6.5%	58.7	NM	1.0x	BXPHARMA	23,409	1.7%	6.8x	0.9x	BEACHHATCH	49.6	-0.2%	102.7	10.6x	3.0x
JMISMDL	149.1	+5.0%	18.1	60.4x	1.7x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	BESTHLONG	16.9	+5.0%	93.7	27.1x	0.3x
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)
PADMALIFE	23.0	-9.8%	12.4	NM	NM	LHB	20,953	1.5%	16.3x	2.9x	RENATA	491.0	490.2	2.0	100	49.06
NBL	3.8	-5.0%	5.4	NM	8x	OLYMPIC	20,496	1.5%	16.9x	2.6x	MLDYEING	9.2	9.2	1.0	4,800	44.16
PLFSL	1.9	-5.0%	0.1	NM	NM	ALARABANK	18,282	1.3%	35.3x	0.8x	FINEFOODS	249.0	249.0	2.0	127	31.62
RUPALIBANK	22.5	-4.3%	37.9	NM	0.6x	BEACONPHAR	17,838	1.3%	30.0x	4.0x	ASIATICLAB	44.0	44.0	1.0	548	24.09
SEMLLECMF	11.5	-4.2%	19.4	NM	1.3x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	KBPPWBIL	114.1	114.0	2.0	200	22.82
ASIAPACINS	30.6	-3.8%	4.1	17.9x	1.2x	ROBI	14,876	1.1%	18.4x	1.9x	MARICO	2,630.0	2,615.0	6.0	7	18.39
TUNGHAI	2.6	-3.7%	0.2	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	TOSRIFA	22.6	22.6	2.0	630	14.24
PRIMELIFE	36.6	-3.7%	9.6	NM	NM	NBL	13,055	0.9%	NM	8.4x	PEOPLESINS	33.4	33.3	2.0	397	13.23
ICBIBANK	2.8	-3.4%	0.2	NM	NM	BSRMLTD	12,852	0.9%	4.7x	0.5x	LOVELLO	95.0	87.5	12.0	112	10.15
ACI	199.0	-3.4%	28.7	NM	3.0x	* 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					EIL	44.0	44.0	2.0	200	8.80

\* 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
RENATA	491.0	490.2	49.1	100	2
MLDYEING	9.2	9.2	44.2	4,800	1
FINEFOODS	249.0	249.0	31.6	127	2
ASIATICLAB	44.0	44.0	24.1	548	1
KBPPWBIL	114.1	114.0	22.8	200	2
MARICO	2,630.0	2,615.0	18.4	7	6
TOSRIFA	22.6	22.6	14.2	630	2
PEOPLESINS	33.4	33.3	13.2	397	2
LOVELLO	95.0	87.5	10.1	112	12
EIL	44.0	44.0	8.8	200	2
PIONEERINS	42.9	42.8	8.6	200	4
RELIANCE1	18.1	17.0	7.8	445	4
SHEPHERD	18.5	17.8	6.2	339	4
CITYBANK	23.4	23.4	4.4	187	1
FEDERALINS	19.5	19.5	3.9	200	3
AL-HAJTEX	135.1	130.0	3.3	25	4
ASIAINS	30.0	30.0	3.0	100	1
AIL	49.6	49.6	2.5	50	1
HAMI	104.5	104.5	2.3	22	1
DHAKAINS	38.8	38.8	1.9	50	1
BRACBANK	60.0	60.0	1.9	31	1
SALVOCHEM	25.5	20.9	1.8	80	2
<b>Total</b>			<b>303.5</b>		<b>81</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
NHFIL		0.0%	10.0%	Record Date	30-Jul-25

**Important DSE News**
**UTTARABANK**

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.58 for April-June 2025 as against Tk. 1.42 for April-June 2024; Consolidated EPS was Tk. 1.82 for January-June 2025 as against Tk. 2.00 for January-June 2024. Consolidated NOCFPS was Tk. 1.90 for January-June 2025 as against Tk. 5.62 for January-June 2024. Consolidated NAV per share was Tk. 27.92 as on June 30, 2025 and Tk. 24.21 as on June 30, 2024.

**GP**

The Board of Directors of the company has declared Interim Cash Dividend for the year 2025 at the rate of 110% of the paid-up capital of the Company which represents 98% of the Profit after Tax for the six-month period ended on 30 June 2025 (BDT 11.00 per share of BDT 10 each), out of the audited net profits of the Company for the six-month period ended 30 June 2025. Record date for entitlement of Interim Cash Dividend is August 13, 2025. Accordingly, the Board of Directors has reported audited Q2 Financials as follows: EPS was Tk. 6.51 for April-June 2025 as against Tk. 6.38 for April-June 2024; EPS was Tk. 11.21 for January-June 2025 as against Tk. 16.29 for January-June 2024. NOCFPS was Tk. 26.94 for January-June 2025 as against Tk. 28.07 for January-June 2024. NAV per share was Tk. 42.15 as on June 30, 2025 and Tk. 53.18 as on June 30, 2024.

**SIPLC**

**(Q2 Un-audited):** EPS was Tk. 1.57 for April-June 2025 as against Tk. 1.14 for April-June 2024; EPS was Tk. 3.47 for January-June 2025 as against Tk. 2.06 for January-June 2024. NOCFPS was Tk. 4.00 for January-June 2025 as against Tk. 5.05 for January-June 2024. NAV per share was Tk. 26.96 as on June 30, 2025 and Tk. 25.16 as on December 31, 2024. Reasons for deviation: Earnings per share (EPS) has increased (January-June 2025) due to increase of premium income, investment and other income. Net operating cash flow per share (NOCFPS) has decreased due to higher re-insurance payment. Net Asset Value per Share (NAV) has increased primarily due to higher rate of investment.

**AL-HAJTEX**

The company has informed that the Board of Directors of the company has decided to purchase 02 (two) used Auto Cone Machine (Schlafhorst Autoconer 338) for increasing production capacity. The company have received an offer from Pahartali Textiles Limited on 25-06-2025 for 02 (two) used Auto Cone Machine (Schlafhorst Autoconer 338) @ Tk. 48,00,000 (Forty-eight lac only).

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