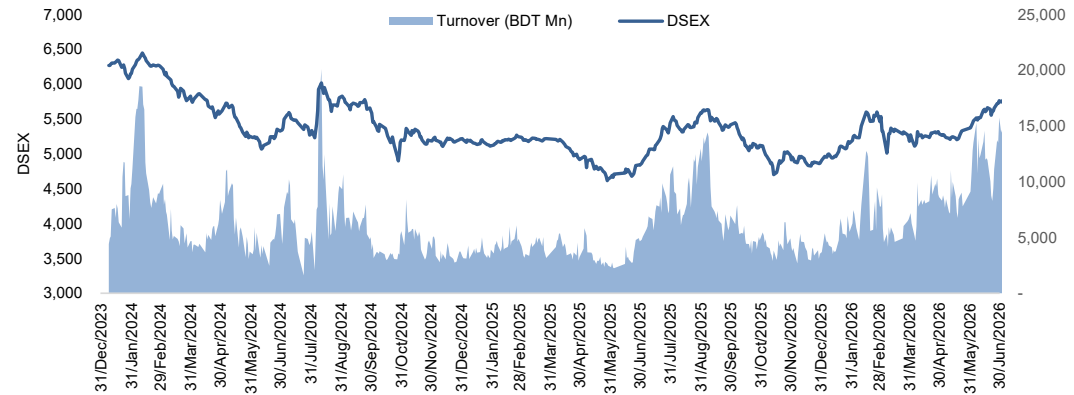


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.71%) gained 41.34 points and closed at 5,898.96. The blue-chip index DS30 (+0.51%), the Shariah-based index DSES (+0.56%), and the large-cap index CDSET (+0.34%) closed at 2,220.00, 1,203.94, and 1,165.26 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 3.57% followed by Food & Allied (+0.96%), Fuel & Power (+0.77%), Engineering (+0.65%), Bank (+0.53%), Telecommunication (+0.31%), and Pharmaceutical (-0.06%), respectively. Block trades contributed 3.6% of the overall market turnover. Queen South Textile Mills Limited (+9.4%) was the most traded share with a turnover of BDT 252 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,898.96	5,857.62	+41.34	+0.71%	+21.2%
DS30	2,220.00	2,208.84	+11.16	+0.51%	+19.8%
DSES	1,203.94	1,197.20	+6.73	+0.56%	+20.3%
CDSET	1,165.26	1,161.26	+4.00	+0.34%	+16.0%

	Advanced	Declined	Unchanged	Total
All Category	294	58	41	393
A Category (Equity)	155	30	13	198
B Category (Equity)	65	6	3	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	74	22	25	121
Mutual Funds	32	0	2	34
Corporate Bonds	1	1	1	3
Treasury Bonds	2	1	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,074,822	7,068,250	+0.1%
	Mn USD	57,204	57,151	
Turnover	Mn BDT	11,294	9,665	+16.9%
	Mn USD	91	78	
Volume	Mn Shares	457	333	+37.2%
No. of Trade		265,358	254,077	+4.4%

* Average Interbank Exchange Rate is BDT 123.68 as of Jul 21, 2026

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Figure: Sectorial Turnover (BDT Mn)

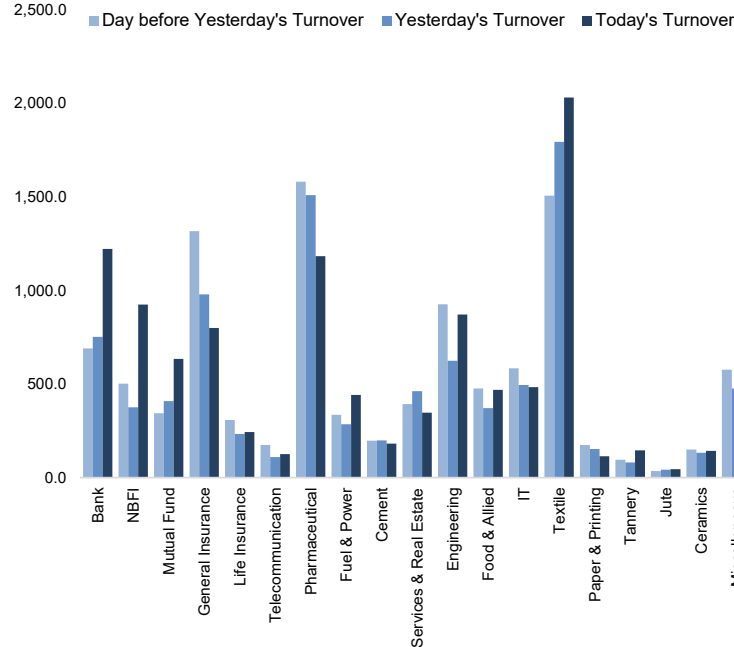
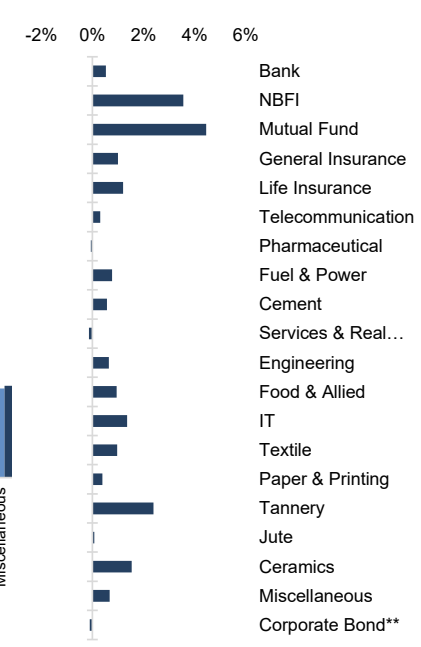


Figure: Sectorial Mcap Change



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	1,595	1,587	+8.34	+0.53%	36	760,350	10.7%	1,221.2	11.2%	7.1x	0.8x	GP	348,512	9.4%	21.0	9.9x	6.2x
NBFI	1,233	1,190	+42.45	+3.57%	23	117,241	1.7%	924.4	8.5%	NM	1.3x	SQURPHARMA	196,615	5.3%	58.7	7.6x	1.3x
Mutual Fund	669	640	+28.57	+4.46%	36	32,203	0.5%	633.9	5.8%	NM	0.6x	ROBI	171,804	4.6%	87.1	16.5x	2.4x
General Insurance	4,197	4,155	+41.70	+1.00%	43	118,569	1.7%	799.0	7.3%	18.9x	1.7x	BRACBANK	146,303	3.9%	174.3	7.3x	1.3x
Life Insurance	1,949	1,925	+23.25	+1.21%	15	54,928	0.8%	242.7	2.2%	NM	NM	WALTONHIL	132,889	3.6%	11.7	13.2x	1.1x
Telecommunication	4,747	4,732	+14.73	+0.31%	3	550,767	7.8%	124.9	1.1%	11.4x	3.8x	BATBC	121,284	3.3%	43.0	25.5x	2.2x
Pharmaceutical	3,246	3,248	-2.04	-0.06%	34	612,726	8.7%	1,182.1	10.9%	11.1x	1.6x	MARICO	86,578	2.3%	13.5	7.5x	29.9x
Fuel & Power	1,191	1,182	+9.08	+0.77%	23	314,295	4.4%	441.1	4.1%	10.1x	0.6x	UPGDCL	73,969	2.0%	7.4	8.0x	1.6x
Cement	2,290	2,277	+13.09	+0.58%	7	107,739	1.5%	181.8	1.7%	25.0x	2.3x	LHB	70,960	1.9%	126.0	14.7x	3.5x
Services & Real Estate	1,229	1,230	-1.67	-0.14%	9	66,864	0.9%	346.7	3.2%	27.2x	0.5x	BERGERPBL	68,935	1.9%	5.9	18.5x	3.5x
Engineering	2,830	2,811	+18.26	+0.65%	42	317,173	4.5%	871.5	8.0%	18.4x	0.9x	PUBALIBANK	58,408	1.6%	10.9	5.2x	0.8x
Food & Allied	12,833	12,711	+121.52	+0.96%	21	234,269	3.3%	469.4	4.3%	39.5x	3.5x	CITYBANK	55,456	1.5%	162.1	3.8x	0.8x
IT	2,713	2,677	+36.44	+1.36%	11	35,930	0.5%	482.6	4.4%	46.7x	2.2x	RENATA	54,022	1.5%	38.9	19.8x	1.5x
Textile	1,444	1,430	+13.95	+0.98%	58	150,201	2.1%	2,030.3	18.6%	NM	1.0x	ISLAMIBANK	52,003	1.4%	3.2	NM	0.8x
Paper & Printing	5,004	4,985	+19.76	+0.40%	6	23,440	0.3%	114.1	1.0%	NM	1.6x	DUTCHBANGL	50,549	1.4%	90.2	4.4x	0.8x
Tannery	2,253	2,200	+52.74	+2.40%	6	26,162	0.4%	146.1	1.3%	NM	1.6x	ICB	41,889	1.1%	23.1	NM	1.6x
Jute	13,518	13,508	+9.66	+0.07%	3	2,948	0.0%	45.0	0.4%	NM	1.8x	EBL	40,106	1.1%	70.5	4.7x	0.7x
Ceramics	522	514	+7.90	+1.54%	5	23,577	0.3%	142.1	1.3%	NM	1.6x	UNILEVERCL	39,871	1.1%	1.1	51.3x	16.9x
Miscellaneous	2,592	2,575	+17.44	+0.68%	15	140,747	2.0%	490.1	4.5%	55.1x	1.1x	PRIMEBANK	37,777	1.0%	50.4	4.2x	0.8x
Corporate Bond**	18,798	18,818	-19.44	-0.10%	16	41,589	0.6%	0.5	0.0%	NM	NM	POWERGRID	37,283	1.0%	4.8	9.2x	0.3x
Treasury Bond**	2,179	2,190	-11.11	-0.51%	232	3,347,172	47.3%	1.8	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
NPOLYMER	37.6	+9.9%	146.3	NM	1.3x	SQURPHARMA	109,809	7.0%	7.6x	1.3x	QUEENSOUTH	17.4	+9.4%	251.8	NM	1.1x
IFIC1STMF	4.5	+9.8%	34.7	NM	0.5x	BRACBANK	78,755	5.0%	7.3x	1.3x	MALEKSPIN	44.2	-2.2%	242.6	7.8x	0.7x
EXIM1STMF	4.6	+9.5%	25.2	NM	0.5x	ISLAMIBANK	51,909	3.3%	NM	0.8x	LANKABAFIN	18.9	+6.2%	227.0	47.3x	1.0x
QUEENSOUTH	17.4	+9.4%	251.8	NM	1.1x	BXPHERMA	47,129	3.0%	7.8x	1.1x	IPDC	33.2	+0.3%	204.0	29.4x	1.9x
MBL1STMF	6.0	+9.1%	36.4	NM	0.7x	WALTONHIL	43,734	2.8%	13.2x	1.1x	DSSL	13.8	+3.0%	185.9	NM	0.8x
UNCCFIN	18.2	+8.98%	122.1	17.0x	1.0x	PUBALIBANK	39,794	2.5%	5.2x	0.8x	TECHNODRUG	48.5	-3.0%	182.7	32.3x	1.5x
NCCBLMF1	7.3	+9.0%	10.3	NM	1x	CITYBANK	38,614	2.5%	3.8x	0.8x	NCCBANK	16.0	+1.3%	178.3	3.2x	0.6x
1JANATAMF	3.7	+8.8%	27.7	NM	0.4x	GP	34,851	2.2%	9.9x	6.2x	BRACBANK	63.9	-0.3%	174.3	7.3x	1.3x
PREMIERLEA	2.5	+8.7%	1.7	NM	NM	BATBC	32,080	2.0%	25.5x	2.2x	ETL	14.6	+3.5%	171.1	22.8x	1.1x
GSPFINANCE	3.9	+8.3%	4.0	NM	NM	EBL	27,497	1.8%	4.7x	0.7x	CITYBANK	31.7	+0.6%	162.1	3.8x	0.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	26,314	1.7%	19.8x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIINS	60.3	-3.8%	13.9	18.5x	2.4x	LHB	25,978	1.7%	14.7x	3.5x	MARICO	2,720.0	2,720.0	9.0	32	87.04
ACIFORMULA	182.0	-3.4%	86.6	24.4x	2x	PRIMEBANK	23,599	1.5%	4.2x	0.8x	CITYGENINS	107.5	97.1	4.0	517	53.43
CNATEX	2.9	-3.0%	182.7	32.3x	1.5x	OLYMPIC	19,582	1.2%	16.5x	2.3x	ASIATICLAB	130.0	128.0	4.0	316	40.68
TECHNODRUG	48.5	-3.0%	182.7	32.3x	1.5x	UTTARABANK	18,031	1.1%	NM	0.8x	BRACBANK	63.5	63.5	7.0	579	36.77
FARCHEM	24.3	-2.4%	46.6	NM	0.8x	ROBI	17,180	1.1%	16.5x	2.4x	PARAMOUNT	66.5	66.5	2.0	334	22.20
MALEKSPIN	44.2	-2.2%	242.6	7.8x	0.7x	ALARABANK	17,011	1.1%	20.7x	0.8x	IPDC	29.9	29.9	1.0	691	20.67
ALLTEX	19.1	-2.1%	9.4	NM	0.7x	BSRMLTD	16,863	1.1%	4.9x	0.6x	ORIONINFU	318.0	318.0	1.0	50	15.90
POPULARLIF	62.6	-2.0%	30.3	NM	NM	BEXIMCO	16,467	1.0%	NM	0.3x	GREENDELT	60.0	60.0	1.0	203	12.20
ACFL	23.3	-1.7%	2.0	NM	0.7x	BEACONPHAR	15,393	1.0%	17.6x	3.3x	MLDYING	16.6	15.0	5.0	780	12.17
NEWLINE	5.9	-1.7%	1.5	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					SAIHAMTEX	19.0	19.0	1.0	522	9.92

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MARICO	2,720.0	2,720.0	87.0	32	9
CITYGENINS	107.5	97.1	53.4	517	4
ASIATICLAB	130.0	128.0	40.7	316	4
BRACBANK	63.5	63.5	36.8	579	7
PARAMOUNT	66.5	66.5	22.2	334	2
IPDC	29.9	29.9	20.7	691	1
ORIONINFU	318.0	318.0	15.9	50	1
GREENDELT	60.0	60.0	12.2	203	1
MLDYEING	16.6	15.0	12.2	780	5
SAIHAMTEX	19.0	19.0	9.9	522	1
SONARGAON	88.0	88.0	8.8	100	1
AMANFEED	41.0	40.0	6.0	150	2
DULAMACOT	206.0	206.0	6.0	29	1
LHB	62.0	61.0	5.9	95	4
DAFODILCOM	164.0	164.0	5.2	32	4
BSC	130.0	118.0	5.1	40	5
ONEBANKPLC	7.7	7.7	4.6	598	1
EHL	100.0	98.6	3.9	39	3
UNITEDINS	45.5	45.5	3.2	70	1
ITC	47.5	47.5	3.2	67	1
SAIFPOWER	9.8	9.7	2.9	300	2
SHARPIND	33.6	33.6	2.8	83	1
Total			402.8		99

Important DSE News
RUPALILIFE

The Board of Directors has recommended 12% Cash Dividend for the year ended December 31, 2025. Date of AGM: 24.09.2026, Time: 10:00 AM, Venue: Through Digital Platform (Link will be notified later). Record Date: 20.08.2026.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BAYLEASING		0.0%	0.0%	Record Date	10-Aug-26
RUPALILIFE		0.0%	12.0%	Record Date	20-Aug-26

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