BRAC EPL
STOCK BROKERAGE LTD

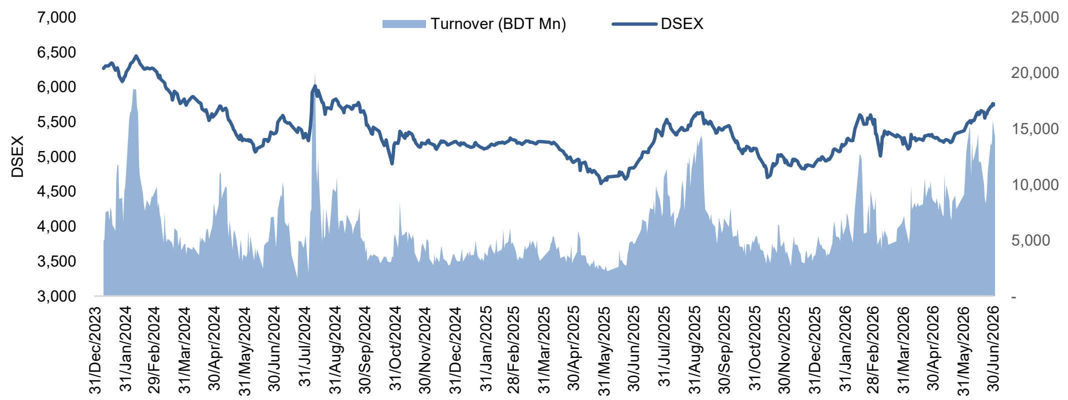
Wednesday, July 22, 2026

DSEX Index Closing 5,871.06 ↓ (-27.90, -0.47%)

Daily Market Update

Market closed in red

The market closed in red today. The benchmark index DSEX (-0.47%) lost 27.9 points and closed at 5,871.06. The blue-chip index DS30 (-0.15%), the Shariah-based index DSES (-0.40%), and the large-cap index CDSET (-0.15%) closed at 2,216.65, 1,199.18, and 1,163.50 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 0.98% followed by Fuel & Power (-0.66%), Pharmaceutical (-0.43%), NBFI (-0.29%), Bank (-0.07%), Telecommunication (+0.17%), and Food & Allied (+0.43%), respectively. Block trades contributed 3.3% of the overall market turnover. IT Consultants PLC. (+3.1%) was the most traded share with a turnover of BDT 524 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,871.06	5,898.96	-27.90	-0.47%	+20.7%
DS30	2,216.65	2,220.00	-3.35	-0.15%	+19.6%
DSES	1,199.18	1,203.94	-4.76	-0.40%	+19.8%
CDSET	1,163.50	1,165.26	-1.76	-0.15%	+15.8%

	Advanced	Declined	Unchanged	Total
All Category	100	245	44	389
A Category (Equity)	54	127	15	196
B Category (Equity)	17	55	1	73
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	63	28	120
Mutual Funds	29	1	4	34
Corporate Bonds	1	2	0	3
Treasury Bonds	1	0	0	1

** Based on Traded Scrips*

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,055,695	7,074,822	-0.3%
	Mn USD	57,056	57,211	
Turnover	Mn BDT	12,111	11,294	+7.2%
	Mn USD	98	91	
Volume	Mn Shares	517	457	+13.2%
No. of Trade		294,367	265,358	+10.9%

** Average Interbank Exchange Rate is BDT 123.66 as of Jul 22, 2026*

Figure: Sectorial Turnover (BDT Mn)

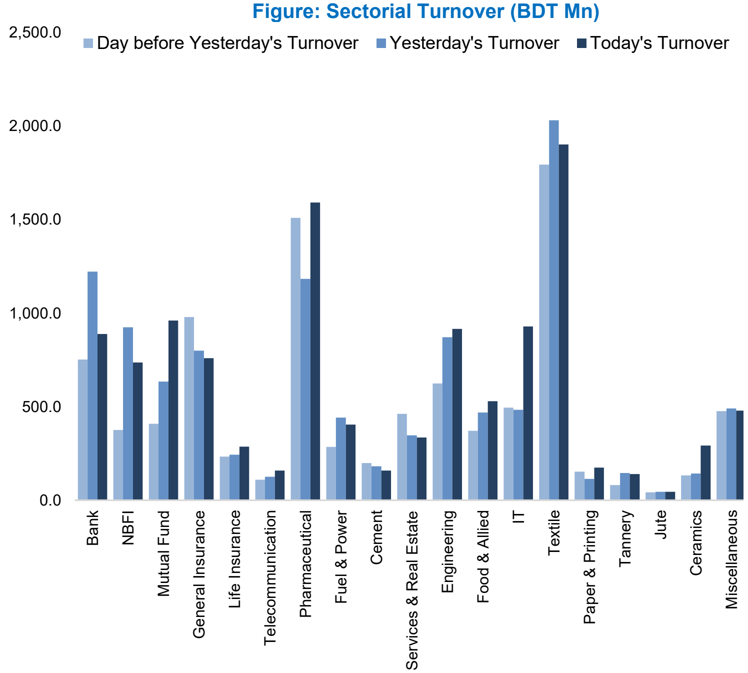
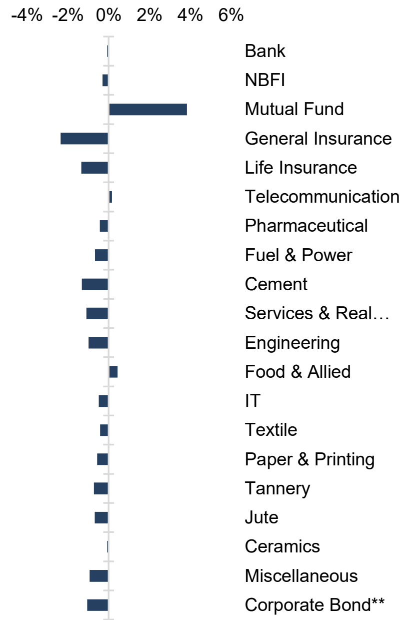


Figure: Sectorial Mcap Change



Market PE	13.7x
Market PB	1.7x

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** 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
Bank	1,594	1,595	-1.18	-0.07%	36	759,789	10.8%	887.8	7.6%	7.1x	0.8x
NBFI	1,229	1,233	-3.63	-0.29%	23	116,896	1.7%	735.5	6.3%	NM	1.2x
Mutual Fund	694	669	+25.62	+3.83%	36	33,437	0.5%	960.6	8.2%	NM	0.6x
General Insurance	4,098	4,197	-98.77	-2.35%	43	115,779	1.6%	758.3	6.5%	18.5x	1.6x
Life Insurance	1,923	1,949	-26.06	-1.34%	15	54,194	0.8%	286.8	2.4%	NM	NM
Telecommunication	4,754	4,747	+7.89	+0.17%	3	551,683	7.8%	159.2	1.4%	11.4x	3.8x
Pharmaceutical	3,232	3,246	-13.88	-0.43%	34	610,106	8.6%	1,590.2	13.6%	11.1x	1.5x
Fuel & Power	1,183	1,191	-7.89	-0.66%	23	312,212	4.4%	404.8	3.5%	10.0x	0.6x
Cement	2,260	2,290	-30.06	-1.31%	7	106,325	1.5%	157.9	1.3%	24.6x	2.3x
Services & Real Estate	1,215	1,229	-13.44	-1.09%	9	66,132	0.9%	335.2	2.9%	26.9x	0.5x
Engineering	2,802	2,830	-27.87	-0.98%	42	314,049	4.4%	915.0	7.8%	18.2x	0.9x
Food & Allied	12,889	12,833	+55.76	+0.43%	21	235,287	3.3%	529.2	4.5%	39.7x	3.6x
IT	2,700	2,713	-12.91	-0.48%	11	35,759	0.5%	928.5	7.9%	46.5x	2.2x
Textile	1,438	1,444	-6.08	-0.42%	58	149,568	2.1%	1,900.3	16.2%	NM	1.0x
Paper & Printing	4,976	5,004	-28.14	-0.56%	6	23,308	0.3%	173.7	1.5%	NM	1.5x
Tannery	2,237	2,253	-16.31	-0.72%	6	25,972	0.4%	139.5	1.2%	NM	1.6x
Jute	13,426	13,518	-92.07	-0.68%	3	2,928	0.0%	44.5	0.4%	NM	1.8x
Ceramics	521	522	-0.36	-0.07%	5	23,560	0.3%	292.8	2.5%	NM	1.6x
Miscellaneous	2,568	2,592	-24.18	-0.93%	15	139,434	2.0%	478.9	4.1%	54.6x	1.1x
Corporate Bond**	18,600	18,798	-197.99	-1.05%	16	41,151	0.6%	4.3	0.0%	NM	NM
Treasury Bond**	2,176	2,179	-3.27	-0.15%	232	3,342,144	47.3%	32.2	0.3%	NM	NM

Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
GP	349,728	9.4%	35.4	9.9x	6.2x
SQURPHARMA	195,728	5.3%	82.5	7.6x	1.3x
ROBI	171,804	4.6%	89.7	16.5x	2.4x
BRACBANK	146,303	4.0%	80.5	7.3x	1.3x
WALTONHIL	132,056	3.6%	9.4	13.1x	1.1x
BATBC	123,174	3.3%	94.7	25.9x	2.2x
MARICO	86,471	2.3%	8.2	7.5x	29.8x
UPGDCL	73,737	2.0%	7.0	7.9x	1.5x
LHB	69,682	1.9%	101.3	14.4x	3.5x
BERGERPBL	68,685	1.9%	10.0	18.5x	3.5x
PUBALIBANK	59,189	1.6%	12.1	5.2x	0.8x
CITYBANK	55,806	1.5%	178.3	3.8x	0.8x
RENATA	54,297	1.5%	36.4	19.9x	1.5x
ISLAMIBANK	51,681	1.4%	4.2	NM	0.8x
DUTCHBANGL	50,752	1.4%	62.9	4.5x	0.8x
ICB	41,195	1.1%	12.6	NM	1.5x
EBL	39,942	1.1%	56.1	4.7x	0.7x
UNILEVERCL	39,736	1.1%	0.7	51.1x	16.8x
PRIMEBANK	37,777	1.0%	18.0	4.2x	0.8x
POWERGRID	36,552	1.0%	15.1	9.0x	0.3x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MBL1STMF	6.6	+10.0%	11.8	NM	0.7x
PRIMEFIN	3.5	+9.4%	8.7	NM	NM
BIFC	4.8	+9.1%	6.1	NM	NM
EXIM1STMF	5.0	+8.7%	23.1	NM	0.5x
FBFIF	3.9	+8.3%	45.1	NM	0.4x
PHOENIXFIN	3.9	+8.33%	4.8	NM	NM
BAYLEASING	5.3	+8.2%	16.4	NM	NM
1JANATAMF	4.0	+8.1%	50.1	NM	0.4x
TRUSTB1MF	4.1	+7.9%	68.8	NM	0.4x
HFL	15.4	+7.7%	6.0	NM	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PREMIERBAN	5.2	-8.8%	17.6	NM	0.4x
USMANIAGL	67.5	-7.5%	10.9	NM	1x
SONARBAINS	38.2	-7.0%	10.8	NM	NM
ZEALBANGLA	219.9	-7.0%	10.8	NM	NM
UNIONINS	49.4	-6.4%	53.8	25.9x	2.5x
NITOLINS	34.3	-6.0%	7.0	18.4x	1.1x
PROVATIINS	54.6	-6.0%	41.2	29.7x	2.4x
TAKAFULINS	45.8	-6.0%	8.1	32.5x	2.3x
ISLAMIINS	57.1	-5.3%	13.1	17.5x	2.3x
SHYAMPSUG	331.5	-5.0%	15.5	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	109,314	7.0%	7.6x	1.3x
BRACBANK	78,755	5.0%	7.3x	1.3x
ISLAMIBANK	51,588	3.3%	NM	0.8x
BXPHARMA	47,098	3.0%	7.8x	1.1x
WALTONHIL	43,459	2.8%	13.1x	1.1x
PUBALIBANK	40,326	2.6%	5.2x	0.8x
CITYBANK	38,858	2.5%	3.8x	0.8x
GP	34,973	2.2%	9.9x	6.2x
BATBC	32,580	2.1%	25.9x	2.2x
EBL	27,384	1.8%	4.7x	0.7x
RENATA	26,448	1.7%	19.9x	1.5x
LHB	25,511	1.6%	14.4x	3.5x
PRIMEBANK	23,599	1.5%	4.2x	0.8x
OLYMPIC	19,369	1.2%	16.3x	2.3x
UTTARABANK	18,031	1.2%	NM	0.8x
ALARABANK	17,207	1.1%	21.0x	0.8x
ROBI	17,180	1.1%	16.5x	2.4x
BSRMLTD	16,468	1.1%	4.8x	0.6x
BEXIMCO	16,152	1.0%	NM	0.3x
BEACONPHAR	15,240	1.0%	17.4x	3.3x

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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ITC	53.1	+3.1%	523.7	15.9x	2.1x
TECHNODRUG	48.4	-0.2%	227.0	32.3x	1.5x
FEKDIL	26.0	-	198.3	NM	1.4x
FUWANGCER	16.7	+3.7%	197.5	NM	1.4x
SALVO	39.3	+0.5%	186.6	62.4x	2.4x
CITYBANK	31.9	+0.6%	178.3	3.8x	0.8x
MALEKSPIN	42.8	-3.2%	174.6	7.5x	0.7x
LANKABAFIN	18.7	-1.1%	166.2	46.8x	1.0x
SAIHAMCOT	21.5	+1.9%	165.0	23.6x	0.6x
IBP	19.4	+3.7%	161.9	NM	1.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONARGAON	91.0	90.0	8.0	1,083	97.59
CITYBANK	28.8	28.8	1.0	2,000	57.60
MARICO	2,720.0	2,720.0	6.0	21	57.12
ASIATICLAB	135.0	135.0	6.0	400	54.00
SUNLIFEINS	72.0	72.0	2.0	552	39.75
DOMINAGE	81.0	68.2	7.0	285	21.55
NAVANAPHAR	79.7	79.7	1.0	150	11.96
ITC	51.3	47.0	4.0	182	8.94
ORIONINFU	317.0	317.0	1.0	25	7.77
SIPLC	101.0	101.0	1.0	40	4.04

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONARGAON	91.0	90.0	97.6	1,083	8
CITYBANK	28.8	28.8	57.6	2,000	1
MARICO	2,720.0	2,720.0	57.1	21	6
ASIATICLAB	135.0	135.0	54.0	400	6
SUNLIFEINS	72.0	72.0	39.8	552	2
DOMINAGE	81.0	68.2	21.6	285	7
NAVANAPHAR	79.7	79.7	12.0	150	1
ITC	51.3	47.0	8.9	182	4
ORIONINFU	317.0	317.0	7.8	25	1
SIPLC	101.0	101.0	4.0	40	1
DAFODILCOM	167.0	167.0	3.3	20	1
SHARPIND	33.2	32.4	2.8	85	3
EHL	101.0	97.0	2.6	26	2
CAPMIBBLMF	14.7	14.7	2.2	150	1
SAIHAMCOT	20.6	20.6	2.0	96	1
AAMRATECH	16.3	16.3	1.9	118	1
SONALILIFE	77.6	77.6	1.9	24	2
ACIFORMULA	183.0	182.0	1.9	10	2
MEGHNAPET	93.0	93.0	1.5	16	2
CITYGENINS	100.0	100.0	1.5	15	1
FEKDIL	28.6	28.6	1.4	50	1
UNIONINS	55.8	55.8	1.4	25	1
Total			**396.2**		**71**

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26

Important DSE News

UNIONCAP

(Q2 Un-audited): Consolidated EPS was Tk. (1.18) for April-June 2026 as against Tk. (1.53) for April-June 2025; Consolidated EPS was Tk. (2.12) for January-June 2026 as against Tk. (1.60) for January-June 2025. Consolidated NOCFPS was Tk. (0.18) for January-June 2026 as against Tk. 0.89 for January-June 2025. Consolidated NAV per share was Tk. (67.61) as on June 30, 2026 and Tk. (65.49) as on December 31, 2025.

SOUTHEASTB

(Q2 Un-audited): Consolidated EPS was Tk. 0.65 for April-June 2026 as against Tk. 0.59 for April-June 2025; Consolidated EPS was Tk. 1.64 for January-June 2026 as against Tk. 1.00 for January-June 2025. Consolidated NOCFPS was Tk. 39.39 for January-June 2026 as against Tk. 2.39 for January-June 2025. Consolidated NAV per share was Tk. 27.16 as on June 30, 2026 and Tk. 24.33 as on as on June 30, 2025.

CRYSTALINS

(Q2 Un-audited): EPS was Tk. 0.81 for April-June 2026 as against Tk. 0.84 for April-June 2025; EPS was Tk. 1.94 for January-June 2026 as against Tk. 1.78 for January-June 2025. NOCFPS was Tk. 1.77 for January-June 2026 as against Tk. 0.90 for January-June 2025. NAV per share was Tk. 28.47 as on June 30, 2026 and Tk. 27.65 as on December 31, 2025.