BRAC EPL
STOCK BROKERAGE LTD

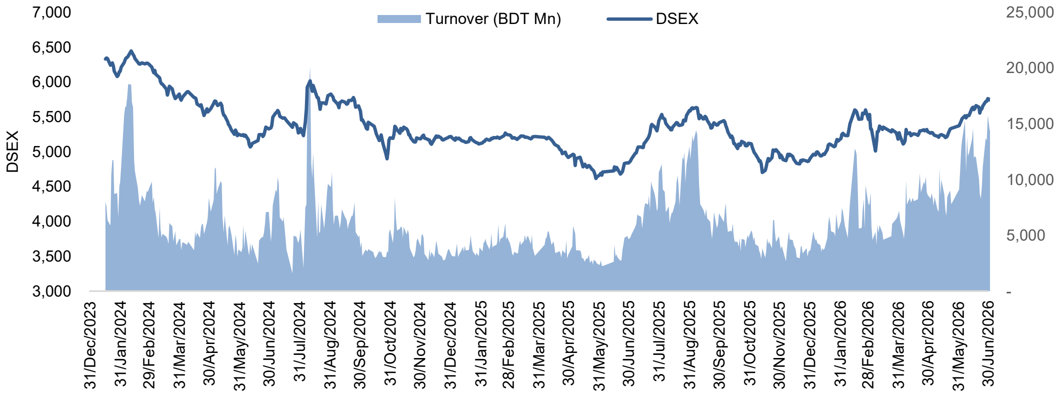
Wednesday, July 29, 2026

DSEX Index Closing 5,878.85 ↓ (-21.41, -0.36%)

Daily Market Update

Market closed in red

The market closed in red today. The benchmark index DSEX (-0.36%) lost 21.41 points and closed at 5,878.85. The blue-chip index DS30 (-0.39%), the Shariah-based index DSES (-0.79%), and the large-cap index CDSET (-0.43%) closed at 2,210.73, 1,191.94, and 1,156.42 points, respectively. Most of the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.95% followed by Engineering (-0.93%), Telecommunication (-0.63%), Fuel & Power (-0.58%), Pharmaceutical (-0.55%), Bank (-0.43%), and Food & Allied (+1.63%), respectively. Block trades contributed 3.1% of the overall market turnover. Argon Denims Limited (+8.6%) was the most traded share with a turnover of BDT 348 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,878.85	5,900.27	-21.41	-0.36%	+20.8%
DS30	2,210.73	2,219.49	-8.77	-0.39%	+19.3%
DSES	1,191.94	1,201.45	-9.51	-0.79%	+19.1%
CDSET	1,156.42	1,161.44	-5.02	-0.43%	+15.1%

	Advanced	Declined	Unchanged	Total
All Category	113	239	39	391
A Category (Equity)	68	117	10	195
B Category (Equity)	20	52	2	74
N Category (Equity)	1	0	0	1
Z Category (Equity)	24	70	27	121
Mutual Funds	6	24	4	34
Corporate Bonds	2	1	0	3
Treasury Bonds	0	1	0	1

** Based on Traded Scrips*

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,040,766	7,049,174	-0.1%
	Mn USD	56,878	56,946	
Turnover	Mn BDT	13,425	12,609	+6.5%
	Mn USD	108	102	
Volume	Mn Shares	505	492	+2.7%
No. of Trade		311,860	278,917	+11.8%

** Average Interbank Exchange Rate is BDT 123.79 as of Jul 29, 2026*

Figure: Sectorial Turnover (BDT Mn)

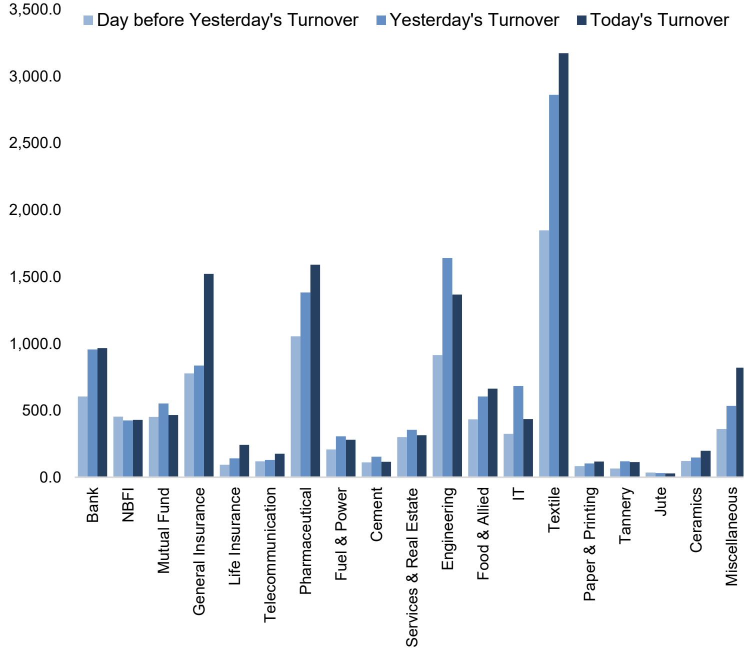
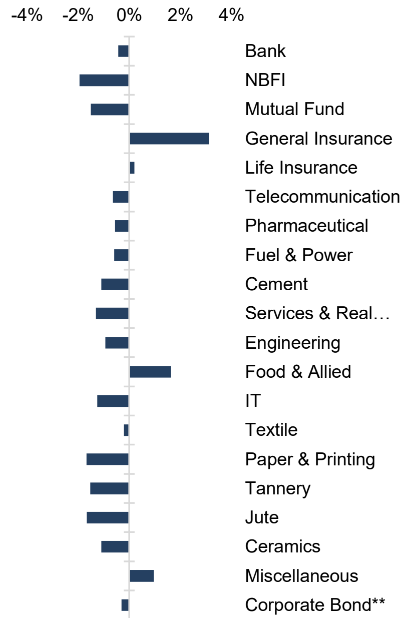


Figure: Sectorial Mcap Change



Market PE 13.4x
Market PB 1.7x

** Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFIs and Banks*

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Daily Market Update

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	1,590	1,597	-6.84	-0.43%	36	758,022	10.8%	966.8	7.4%	6.8x	0.8x
NBFI	1,210	1,234	-24.03	-1.95%	23	115,020	1.6%	429.6	3.3%	NM	1.2x
Mutual Fund	675	685	-10.29	-1.50%	36	32,517	0.5%	465.0	3.6%	NM	0.6x
General Insurance	4,397	4,264	+133.65	+3.13%	43	124,236	1.8%	1,521.0	11.7%	18.8x	1.7x
Life Insurance	1,922	1,918	+3.99	+0.21%	15	54,178	0.8%	242.7	1.9%	NM	NM
Telecommunication	4,723	4,753	-30.09	-0.63%	3	548,028	7.8%	176.1	1.4%	11.3x	3.9x
Pharmaceutical	3,205	3,222	-17.72	-0.55%	34	604,916	8.6%	1,589.4	12.2%	11.0x	1.5x
Fuel & Power	1,176	1,183	-6.88	-0.58%	23	310,524	4.4%	279.9	2.2%	10.0x	0.6x
Cement	2,208	2,232	-24.40	-1.09%	7	103,863	1.5%	115.8	0.9%	24.6x	2.3x
Services & Real Estate	1,199	1,214	-15.83	-1.30%	9	65,220	0.9%	315.2	2.4%	26.6x	0.5x
Engineering	2,795	2,822	-26.31	-0.93%	42	313,344	4.4%	1,365.9	10.5%	17.7x	0.9x
Food & Allied	13,472	13,255	+216.69	+1.63%	21	245,942	3.5%	662.6	5.1%	36.0x	3.6x
IT	2,652	2,686	-33.64	-1.25%	11	35,120	0.5%	434.2	3.3%	45.6x	2.1x
Textile	1,484	1,487	-3.03	-0.20%	58	154,309	2.2%	3,171.3	24.4%	NM	1.0x
Paper & Printing	4,872	4,954	-82.73	-1.67%	6	22,818	0.3%	118.0	0.9%	NM	1.5x
Tannery	2,223	2,258	-34.38	-1.52%	6	25,817	0.4%	114.0	0.9%	NM	1.6x
Jute	13,307	13,532	-225.06	-1.66%	3	2,902	0.0%	28.0	0.2%	NM	1.8x
Ceramics	507	513	-5.59	-1.09%	5	22,928	0.3%	197.3	1.5%	NM	1.5x
Miscellaneous	2,556	2,532	+24.26	+0.96%	15	138,793	2.0%	818.4	6.3%	39.6x	1.0x
Corporate Bond**	18,461	18,517	-56.27	-0.30%	16	40,843	0.6%	0.3	0.0%	NM	NM
Treasury Bond**	2,165	2,162	+2.62	+0.12%	232	3,325,271	47.2%	1.6	0.0%	NM	NM

Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
GP	350,133	9.5%	46.7	9.9x	6.2x
SQURPHARMA	193,335	5.2%	92.4	7.5x	1.3x
ROBI	168,138	4.5%	117.6	16.1x	2.6x
BRACBANK	146,303	4.0%	195.8	6.4x	1.3x
BATBC	135,378	3.7%	238.1	23.3x	2.3x
WALTONHIL	130,623	3.5%	11.3	13.0x	1.1x
MARICO	86,616	2.3%	7.0	7.6x	29.9x
UPGDCL	73,100	2.0%	2.7	7.9x	1.5x
BERGERPBL	72,505	2.0%	182.0	15.5x	3.4x
LHB	68,405	1.8%	65.9	14.1x	3.4x
PUBALIBANK	60,595	1.6%	35.6	5.4x	0.8x
CITYBANK	55,106	1.5%	193.2	3.6x	0.8x
RENATA	54,607	1.5%	26.9	20.0x	1.5x
ISLAMIBANK	51,359	1.4%	1.5	NM	0.7x
DUTCHBANGL	50,853	1.4%	51.7	4.5x	0.8x
ICB	40,241	1.1%	6.8	NM	1.5x
EBL	39,942	1.1%	55.3	4.4x	0.8x
UNILEVERCL	39,474	1.1%	2.4	64.5x	24.2x
POWERGRID	37,283	1.0%	9.7	9.2x	0.3x
PRIMEBANK	37,168	1.0%	26.4	4.1x	0.8x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
UNITEDINS	56.3	+10.0%	65.3	14.9x	1.6x
SAIHAMTEX	23.1	+9.5%	246.8	37.3x	0.5x
FASFIN	2.4	+9.1%	3.3	NM	NM
ARGONDENIM	25.2	+8.6%	347.8	21.9x	1.0x
SONARGAON	106.9	+8.1%	146.4	NM	5.9x
PRIMEINSUR	49.7	+7.34%	35.1	22.5x	2.3x
KARNAPHULI	50.8	+6.9%	136.1	20.7x	2x
EXIM1STMF	6.2	+6.9%	33.3	NM	0.7x
NITOLINS	37.3	+6.9%	9.8	18.4x	1.2x
PROVATIINS	60.5	+6.0%	64.7	29.2x	2.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	21.1	-7.5%	292.1	NM	0.3x
FORTUNE	19.2	-6.8%	32.7	NM	1x
RENWICKJA	838.9	-5.8%	8.3	4.2x	0.5x
NRBBANK	6.5	-5.8%	8.3	4.2x	0.5x
MLDYEING	16.9	-5.6%	136.4	NM	1.4x
BAYLEASING	5.2	-5.5%	3.6	NM	NM
NCCBLMF1	7.0	-5.4%	6.2	NM	0.8x
PHPMF1	3.8	-5.0%	6.4	NM	0.4x
TRUSTB1MF	3.8	-5.0%	14.2	NM	0.4x
ABB1STMF	3.8	-5.0%	17.1	NM	0.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	107,978	6.9%	7.5x	1.3x
BRACBANK	78,755	5.0%	6.4x	1.3x
ISLAMIBANK	51,266	3.3%	NM	0.7x
BXPHARMA	45,851	2.9%	7.6x	1.1x
WALTONHIL	42,988	2.8%	13.0x	1.1x
PUBALIBANK	41,283	2.6%	5.4x	0.8x
CITYBANK	38,370	2.5%	3.6x	0.8x
BATBC	35,807	2.3%	23.3x	2.3x
GP	35,013	2.2%	9.9x	6.2x
EBL	27,384	1.8%	4.4x	0.8x
RENATA	26,599	1.7%	20.0x	1.5x
LHB	25,043	1.6%	14.1x	3.4x
PRIMEBANK	23,219	1.5%	4.1x	0.8x
OLYMPIC	19,356	1.2%	16.3x	2.3x
UTTARABANK	17,946	1.1%	NM	0.8x
ALARABANK	17,011	1.1%	20.7x	0.8x
ROBI	16,814	1.1%	16.1x	2.6x
BSRMLTD	16,405	1.1%	4.8x	0.6x
BEACONPHAR	15,032	1.0%	17.2x	3.2x
JAMUNABANK	14,266	0.9%	3.6x	0.8x

* 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
ARGONDENIM	25.2	+8.6%	347.8	21.9x	1.0x
DOMINAGE	84.5	-2.0%	338.6	NM	5.0x
BEXIMCO	21.1	-7.5%	292.1	NM	0.3x
SAIHAMTEX	23.1	+9.5%	246.8	37.3x	0.5x
BATBC	250.7	+3.8%	238.1	23.3x	2.3x
ACMEPL	23.9	+2.6%	222.3	NM	1.5x
ITC	52.6	-1.3%	201.6	15.8x	2.1x
SAIHAMCOT	22.9	-2.1%	197.1	25.2x	0.6x
BRACBANK	63.9	-0.3%	195.8	6.4x	1.3x
IBP	20.2	-1.9%	194.0	NM	1.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FINEFOODS	479.0	479.0	4.0	238	114.05
CITYGENINS	110.2	110.0	3.0	754	83.02
MTB	14.8	14.8	3.0	1,909	28.26
BANKASIA	19.9	19.9	2.0	1,100	21.89
RELIANCINS	124.9	124.9	1.0	150	18.74
PREMIERBAN	5.5	5.2	3.0	3,283	17.24
IPDC	35.0	29.9	2.0	495	14.98
FEKDIL	26.1	25.9	2.0	515	13.42
ASIATICLAB	122.0	120.8	3.0	110	13.41
MLDYEING	17.5	17.5	1.0	711	12.44

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
FINEFOODS	479.0	479.0	114.0	238	4
CITYGENINS	110.2	110.0	83.0	754	3
MTB	14.8	14.8	28.3	1,909	3
BANKASIA	19.9	19.9	21.9	1,100	2
RELIANCINS	124.9	124.9	18.7	150	1
PREMIERBAN	5.5	5.2	17.2	3,283	3
IPDC	35.0	29.9	15.0	495	2
FEKDIL	26.1	25.9	13.4	515	2
ASIATICLAB	122.0	120.8	13.4	110	3
MLDYEING	17.5	17.5	12.4	711	1
SONARGAON	99.5	95.0	12.1	127	4
ROBI	35.6	35.6	10.1	284	3
NAVANAPHAR	66.1	66.1	9.7	147	1
DAFODILCOM	160.5	160.0	7.4	46	4
PRAGATIINS	69.2	69.2	3.5	51	3
DOMINAGE	77.6	77.6	2.9	37	2
BBS	16.3	16.3	2.5	155	1
IFIC	5.1	5.1	2.3	458	1
GLOBALINS	44.0	44.0	2.2	51	3
NCCBANK	16.5	16.5	2.0	123	1
ORIONINFU	310.0	310.0	1.9	6	1
TECHNODRUG	51.6	51.6	1.5	30	2
Total			**412.3**		**71**

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
AL-HAJTEX		0.0%	3.0%	Record Date	16-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

BRACBANK

(Q2 Un-audited): Consolidated EPS was Tk. 2.55 for April-June 2026 as against Tk. 1.34 for April-June 2025; Consolidated EPS was Tk. 5.07 for January-June 2026 as against Tk. 3.09 for January-June 2025. Consolidated NOCFPS was Tk. 40.05 for January-June 2026 as against Tk. 38.47 for January-June 2025. Consolidated NAV per share was Tk. 49.38 as on June 30, 2026 and Tk. 44.84 as on December 31, 2025. (cont.1)

UNILEVERCL

(Q2 Un-audited): EPS was Tk. 4.04 for April-June 2026 as against Tk. 12.62 for April-June 2025; EPS was Tk. 10.33 for January-June 2026 as against Tk. 19.78 for January-June 2025. NOCFPS was Tk. 30.13 for January-June 2026 as against Tk. (23.57) for January-June 2025. NAV per share was Tk. 84.62 as on June 30, 2026 and Tk. 94.61 as on June 30, 2025. Earnings Per Share (EPS) decline was primarily driven by degrowth in sales and the one-off gain recognised (cont.)

ROBI

(Q2 Un-audited): Consolidated EPS was Tk. 0.50 for April-June 2026 as against Tk. 0.49 for April-June 2025; Consolidated EPS was Tk. 0.95 for January-June 2026 as against Tk. 0.73 for January-June 2025. Consolidated NOCFPS was Tk. 2.35 for January-June 2026 as against Tk. 4.48 for January-June 2025. Consolidated NAV per share was Tk. 12.53 as on June 30, 2026 and Tk. 12.31 as on June 30, 2025.

BERGERPBL

(Q1 Un-audited): Consolidated EPS was Tk. 36.81 for April-June 2026 as against Tk. 18.11 for April-June 2025; Consolidated NOCFPS was Tk. (5.88) for April-June 2026 as against Tk. (34.61) for April-June 2025. Consolidated NAV per share was Tk. 437.05 as on June 30, 2026 and Tk. 400.24 as on March 31, 2026. (cont.1)

UTTARABANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.17 for April-June 2026 as against Tk. 0.46 for April-June 2025; Consolidated EPS was Tk. 2.23 for January-June 2026 as against Tk. 1.46 for January-June 2025. Consolidated NOCFPS was Tk. 10.84 for January-June 2026 as against Tk. 1.52 for January-June 2025. Consolidated NAV per share was Tk. 27.50 as on June 30, 2026 and Tk. 22.33 as on June 30, 2025. EPS increased due to higher investment income as (cont.)

NCCBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.01 for April-June 2026 as against Tk. 0.96 (restated) for April-June 2025; Consolidated EPS was Tk. 2.08 for January-June 2026 as against Tk. 1.86 (restated) for January-June 2025. Consolidated NOCFPS was Tk. 6.68 for January-June 2026 as against Tk. 10.96 (restated) for January-June 2025. Consolidated NAV per share was Tk. 26.39 as on June 30, 2026 and Tk. 26.15 as on December 31, 2025. (cont.)

PLFSL

(Q2 Un-audited): EPS was Tk. (3.36) for April-June 2026 as against Tk. (3.17) for April-June 2025; EPS was Tk. (6.69) for January-June 2026 as against Tk. (6.62) for January-June 2025. NOCFPS was Tk. 0.42 for January-June 2026 as against Tk. (0.52) for January-June 2025. NAV per share was Tk. (159.95) as on June 30, 2026 and Tk. (156.12) as on June 30, 2025.