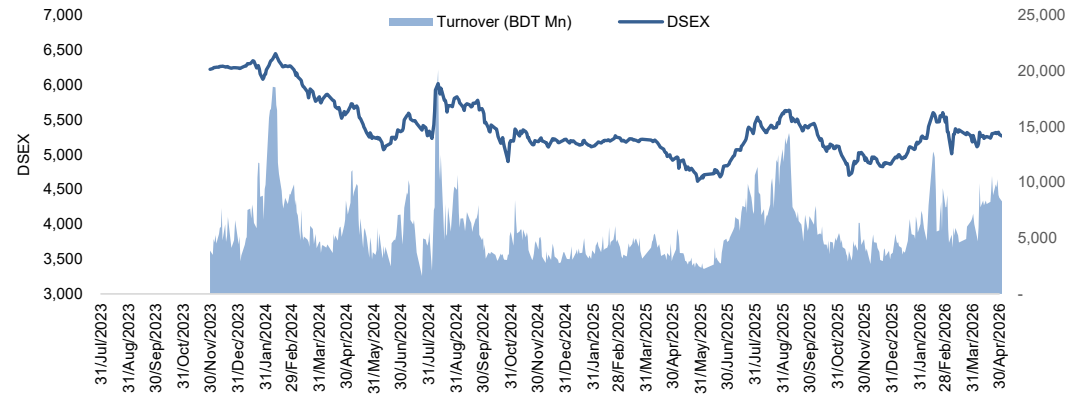


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.62%) lost 35.18 points and closed at 5,605.57. The blue-chip index DS30 (-0.84%), the Shariah-based index DSES (-0.47%), and the large-cap index CDSET (-0.85%) closed at 2,110.31, 1,128.90, and 1,113.44 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 0.89% followed by Food & Allied (-0.87%), Bank (-0.87%), Fuel & Power (-0.55%), Pharmaceutical (-0.38%), Telecommunication (-0.04%), and NBFI (+0.30%), respectively. Block trades contributed 4.9% of the overall market turnover. Summit Alliance Port Limited (+2.8%) was the most traded share with a turnover of BDT 632 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,605.57	5,640.76	-35.18	-0.62%	+15.2%
DS30	2,110.31	2,128.14	-17.83	-0.84%	+13.9%
DSES	1,128.90	1,134.29	-5.39	-0.47%	+12.8%
CDSET	1,113.44	1,123.04	-9.60	-0.85%	+10.8%

	Advanced	Declined	Unchanged	Total
All Category	109	240	47	396
A Category (Equity)	35	143	23	201
B Category (Equity)	40	32	3	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	34	65	21	120
Mutual Funds	8	8	18	34
Corporate Bonds	1	2	0	3
Treasury Bonds	3	5	0	8

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,893,455	6,970,102	-1.1%
	Mn USD	56,085	56,709	
Turnover	Mn BDT	11,961	14,561	-17.9%
	Mn USD	97	118	
Volume	Mn Shares	416	492	-15.3%
No. of Trade		278,894	326,336	-14.5%

* Average Interbank Exchange Rate is BDT 122.91 as of Jun 16, 2026

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Figure: Sectorial Turnover (BDT Mn)

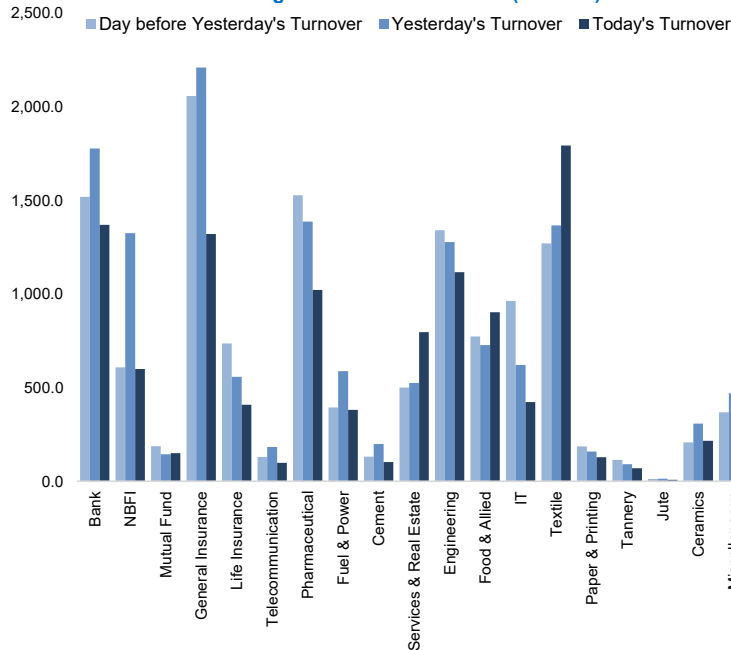
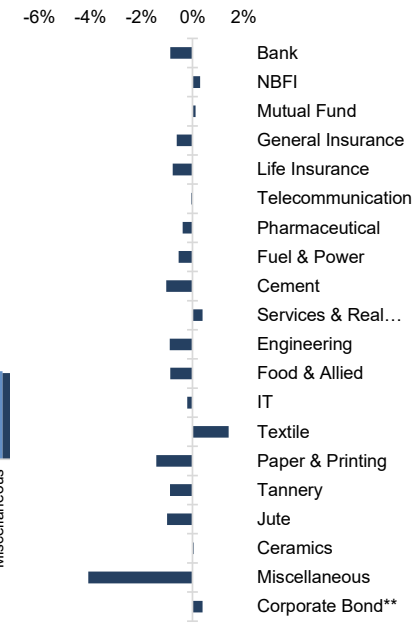


Figure: Sectorial Mcap Change



Market PE 13.7x
Market PB 1.6x

* 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	1,567	1,581	-13.69	-0.87%	36	742,183	10.8%	1,369.1	12.0%	7.6x	0.7x	GP	338,385	9.5%	33.6	11.3x	5.4x
NBFI	1,114	1,111	+3.28	+0.30%	23	105,361	1.5%	599.8	5.3%	NM	1.1x	SQRPHARMA	192,271	5.4%	88.5	7.4x	1.3x
Mutual Fund	536	536	+0.64	+0.12%	36	25,831	0.4%	149.9	1.3%	NM	0.5x	ROBI	162,376	4.6%	53.1	15.6x	2.2x
General Insurance	4,151	4,177	-25.82	-0.62%	43	117,189	1.7%	1,320.0	11.6%	18.9x	1.6x	BRACBANK	151,340	4.3%	135.4	7.6x	1.4x
Life Insurance	1,952	1,967	-15.28	-0.78%	15	55,018	0.8%	408.6	3.6%	NM	NM	WALTONHIL	125,658	3.5%	13.2	12.5x	1.0x
Telecommunication	4,553	4,555	-2.03	-0.04%	3	528,275	7.7%	98.2	0.9%	12.3x	3.4x	BATBC	114,534	3.2%	39.3	24.1x	2.1x
Pharmaceutical	3,093	3,104	-11.86	-0.38%	34	583,777	8.5%	1,021.4	9.0%	11.1x	1.5x	MARICO	86,464	2.4%	8.5	7.5x	29.8x
Fuel & Power	1,124	1,130	-6.17	-0.55%	23	296,631	4.3%	380.8	3.3%	9.5x	0.6x	UPGDCL	72,346	2.0%	4.1	7.8x	1.5x
Cement	2,045	2,066	-21.22	-1.03%	7	96,225	1.4%	102.2	0.9%	22.3x	2.1x	BERGERPBL	69,505	2.0%	26.6	11.2x	3.5x
Services & Real Estate	1,151	1,146	+4.53	+0.40%	9	62,629	0.9%	795.6	7.0%	24.5x	0.5x	LHB	63,063	1.8%	48.5	13.0x	3.1x
Engineering	2,617	2,641	-23.47	-0.89%	42	293,382	4.3%	1,116.1	9.8%	15.0x	0.9x	PUBALIBANK	55,825	1.6%	8.5	4.9x	0.7x
Food & Allied	12,268	12,376	-107.68	-0.87%	21	223,967	3.2%	902.5	7.9%	37.7x	3.4x	BEXIMCO	55,274	1.6%	2.3	NM	0.7x
IT	2,428	2,433	-4.94	-0.20%	11	32,159	0.5%	422.2	3.7%	37.3x	1.9x	ISLAMIBANK	54,901	1.5%	72.1	NM	0.8x
Textile	1,276	1,258	+17.80	+1.41%	58	132,751	1.9%	1,792.6	15.8%	NM	0.9x	CITYBANK	53,357	1.5%	142.6	3.6x	0.8x
Paper & Printing	4,699	4,767	-67.69	-1.42%	6	22,010	0.3%	128.2	1.1%	NM	1.5x	RENATA	49,698	1.4%	22.7	18.2x	1.4x
Tannery	2,065	2,084	-18.40	-0.88%	6	23,984	0.3%	70.0	0.6%	NM	1.5x	DUTCHBANGL	43,545	1.2%	18.2	3.8x	0.7x
Jute	11,891	12,011	-119.95	-1.00%	3	2,594	0.0%	8.1	0.1%	NM	1.6x	EBL	40,763	1.1%	61.7	4.8x	0.8x
Ceramics	491	491	+0.24	+0.05%	5	22,186	0.3%	216.6	1.9%	NM	1.5x	UNILEVERCL	39,709	1.1%	0.9	51.1x	16.8x
Miscellaneous	3,106	3,238	-132.26	-4.08%	15	168,660	2.4%	459.9	4.0%	33.6x	1.3x	ICB	37,639	1.1%	12.4	NM	1.4x
Corporate Bond**	18,643	18,570	+73.18	+0.39%	16	41,137	0.6%	4.2	0.0%	NM	NM	PRIMEBANK	36,680	1.0%	25.2	4.1x	0.8x
Treasury Bond**	2,162	2,194	-31.72	-1.45%	232	3,321,588	48.2%	7.2	0.1%	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
ICBEPMF1S1	6.6	+10.0%	5.6	NM	0.5x	SQRPHARMA	107,383	7.1%	7.4x	1.3x	SAPORTL	58.5	+2.8%	632.0	27.6x	1.7x
NFML	19.0	+9.8%	150.4	#####	1.7x	BRACBANK	81,466	5.4%	7.6x	1.4x	NCCBANK	16.6	+2.8%	523.0	8.6x	0.6x
VFSTDL	17.0	+9.7%	113.2	NM	0.8x	ISLAMIBANK	54,802	3.6%	NM	0.8x	IPDC	28.3	+9.2%	353.3	25.1x	1.6x
BDTHAI	20.4	+9.7%	233.5	NM	0.8x	WALTONHIL	41,354	2.7%	12.5x	1.0x	FINEFOODS	544.6	-1.3%	288.0	69.5x	25.7x
IPDC	28.3	+9.2%	353.3	25.1x	1.6x	BXPBARMA	41,238	2.7%	9.2x	1.2x	BXPBARMA	132.3	+1.0%	258.1	9.2x	1.2x
ETL	13.5	+8.87%	208.2	21.1x	1.1x	PUBALIBANK	40,082	2.7%	4.9x	0.7x	BDTHAI	20.4	+9.7%	233.5	NM	0.8x
DSSL	11.2	+8.7%	149.2	NM	1x	CITYBANK	37,152	2.5%	3.6x	0.8x	ETL	13.5	+8.9%	208.2	21.1x	1.1x
FAREASTFIN	1.4	+7.7%	1.6	NM	NM	BEXIMCO	36,973	2.4%	NM	0.7x	BDTHAIFOOD	30.9	+7.3%	204.8	NM	2.6x
PLFSL	1.4	+7.7%	1.1	NM	NM	GP	33,839	2.2%	11.3x	5.4x	RELIANCINS	111.2	+3.2%	152.3	12.3x	1.3x
BDTHAIFOOD	30.9	+7.3%	204.8	NM	2.6x	BATBC	30,294	2.0%	24.1x	2.1x	NFML	19.0	+9.8%	150.4	100.0x	1.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	LHB	PRIMEBANK	UTTARABANK	OLYMPIC	ROBI	BEACONPHAR	BSRMLTD	ALARABANK	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEXIMCO	58.6	-10.0%	2.3	NM	0.7x	24,208	23,087	22,914	18,833	18,567	16,238	15,101	14,652	14,176	DOMINAGE	87.7	73.0	28.0	1,841	139.17
MIDASFIN	5.7	-6.6%	1.2	NM	570x	1.6%	1.5%	1.5%	1.2%	1.2%	1.1%	1.0%	1.0%	0.9%	BRACBANK	66.0	66.0	1.0	1,000	66.00
SUNLIFEINS	72.2	-5.1%	2.9	NM	0.3x	18.2x	13.0x	4.1x	22.4x	15.6x	15.6x	17.3x	4.3x	17.3x	IPDC	28.3	28.0	3.0	1,700	47.93
REGENTTEX	7.5	-5.1%	2.9	NM	0.3x	1.6%	1.5%	1.5%	2.2x	2.2x	2.2x	3.2x	0.5x	0.9%	BDTHAI	20.0	19.2	10.0	2,312	45.04
NRRBANK	5.9	-4.8%	4.5	NM	0.5x	18.2x	13.0x	4.1x	22.4x	15.6x	15.6x	17.3x	4.3x	17.3x	PRIMEBANK	30.0	30.0	2.0	1,500	45.00
PREMIERBAN	4.4	-4.3%	1.9	NM	0.3x	1.6%	1.5%	1.5%	2.2x	2.2x	2.2x	3.2x	0.5x	0.9%	CITYGENINS	100.0	96.1	6.0	362	34.96
SONALILIFE	83.4	-4.2%	47.1	NM	NM	18.2x	13.0x	4.1x	22.4x	15.6x	15.6x	17.3x	4.3x	17.3x	GQBALLPEN	708.4	620.0	8.0	44	28.96
SONARGAON	84.0	-4.0%	91.6	NM	4.6x	1.6%	1.5%	1.5%	2.2x	2.2x	2.2x	3.2x	0.5x	0.9%	DAFODILCOM	154.0	141.0	14.0	186	27.93
UNIONCAP	4.9	-3.9%	1.8	NM	NM	1.6%	1.5%	1.5%	2.2x	2.2x	2.2x	3.2x	0.5x	0.9%	LOVELLO	79.8	70.0	6.0	279	20.08
RENWICKJA	539.6	-3.7%	0.0	NM	NM	1.6%	1.5%	1.5%	2.2x	2.2x	2.2x	3.2x	0.5x	0.9%	KARNAPHULI	42.0	42.0	1.0	349	14.66

* 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
DOMINAGE	87.7	73.0	139.2	1,841	28
BRACBANK	66.0	66.0	66.0	1,000	1
IPDC	28.3	28.0	47.9	1,700	3
BDTHAI	20.0	19.2	45.0	2,312	10
PRIMEBANK	30.0	30.0	45.0	1,500	2
CITYGENINS	100.0	96.1	35.0	362	6
GQBALLPEN	708.4	620.0	29.0	44	8
DAFODILCOM	154.0	141.0	27.9	186	14
LOVELLO	79.8	70.0	20.1	279	6
KARNAPHULI	42.0	42.0	14.7	349	1
TECHNODRUG	47.5	39.5	13.2	331	2
MALEKSPIN	31.0	30.0	12.1	400	3
APEXSPINN	360.0	340.0	7.1	20	2
COPPERTECH	30.6	30.6	7.0	230	1
NCCBANK	17.0	17.0	6.8	402	3
MONNOCERA	106.8	106.8	5.9	56	1
POPULARLIF	56.9	56.9	5.7	100	1
ISLAMIINS	56.5	50.4	5.0	96	2
SINGERBD	85.2	85.0	4.3	50	3
DULAMIACOT	195.0	173.0	4.2	24	3
SAIHAMTEX	18.0	18.0	4.2	234	1
MAGURAPLEX	96.5	96.5	4.2	43	1
Total			587.8		141

Important DSE News
NFML

(Q1 Un-audited): EPS was Tk. (0.08) for July-September 2025 as against Tk. (0.24) for July-September 2024; NOCFPS was Tk. 0.02 for July-September 2025 as against Tk. 0.01 for July-September 2024. NAV per share was Tk. 11.02 as on September 30, 2025 and Tk. 11.09 as on June 30, 2025.

BERGERPBL

The Board of Directors has recommended 525% Cash Dividend for the year ended March 31, 2026. Date of AGM: 24.08.2026, Time: 10:00 AM, Mode of AGM: Digital Platform. Record Date: 07.07.2026. The Company has also reported Consolidated EPS of Tk. 76.83, Consolidated NAV per share of Tk. 400.24 and Consolidated NOCFPS of Tk. 89.53 for the year ended March 31, 2026 as against Tk. 71.20, Tk. 333.42, and Tk. 57.76 respectively for the year ended March 31, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

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