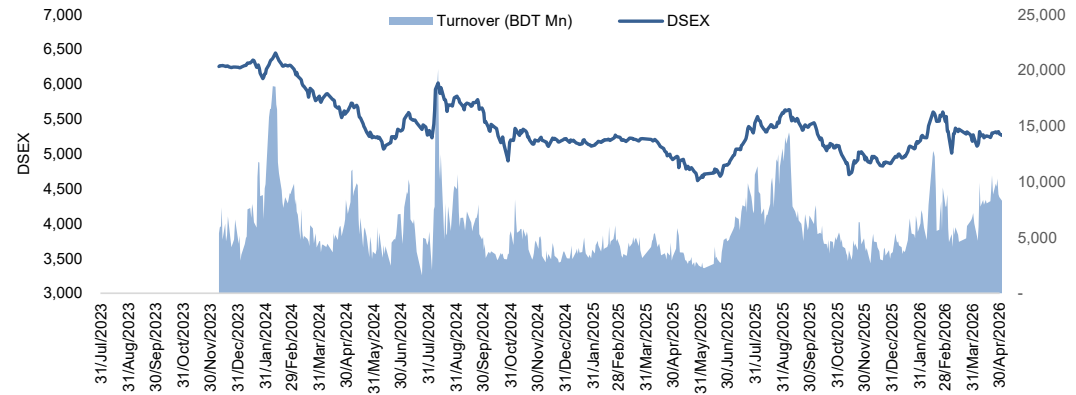


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.21%) gained 11.58 points and closed at 5,616.83. The blue-chip index DS30 (+0.00%), the Shariah-based index DSES (+0.07%), and the large-cap index CDSET (-0.04%) closed at 2,127.48, 1,140.32, and 1,124.21 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.75% followed by Telecommunication (+0.63%), Fuel & Power (+0.54%), Engineering (+0.42%), Pharmaceutical (+0.10%), Bank (-0.04%), and Food & Allied (-0.17%), respectively. Block trades contributed 3.8% of the overall market turnover. Beximco Pharmaceuticals PLC. (-2.7%) was the most traded share with a turnover of BDT 603 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,616.83	5,605.25	+11.58	+0.21%	+15.4%
DS30	2,127.48	2,127.38	+0.10	+0.00%	+14.8%
DSES	1,140.32	1,139.50	+0.82	+0.07%	+14.0%
CDSET	1,124.21	1,124.67	-0.46	-0.04%	+11.9%

	Advanced	Declined	Unchanged	Total
All Category	182	150	65	397
A Category (Equity)	99	72	31	202
B Category (Equity)	34	35	6	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	49	43	28	120
Mutual Funds	12	4	18	34
Corporate Bonds	2	1	1	4
Treasury Bonds	4	2	0	6

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,908,679	6,902,496	+0.1%
	Mn USD	56,191	56,140	
Turnover	Mn BDT	9,402	8,284	
	Mn USD	76	67	+13.5%
Volume	Mn Shares	267	245	+8.7%
No. of Trade		223,987	206,339	+8.6%

* Average Interbank Exchange Rate is BDT 122.95 as of Jun 24, 2026

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Figure: Sectorial Turnover (BDT Mn)

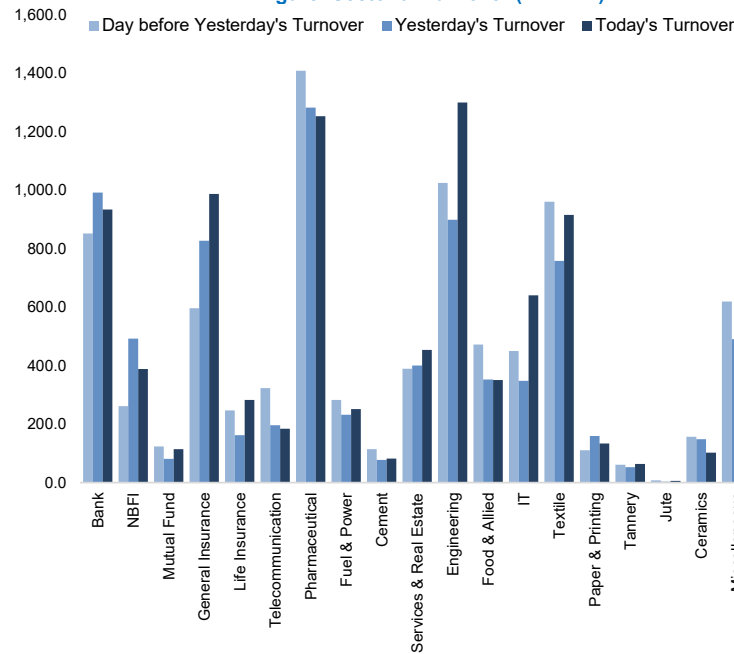
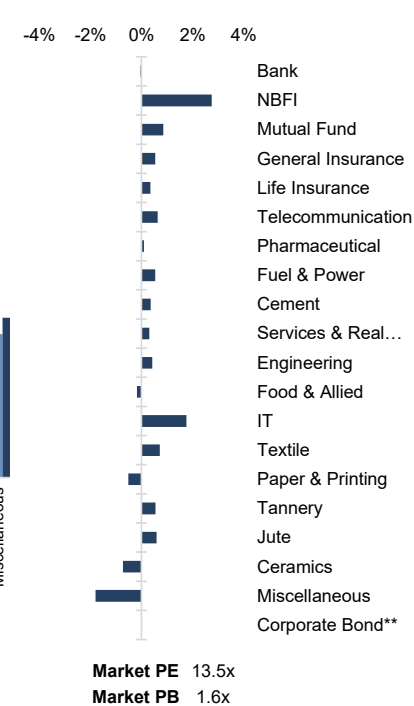


Figure: Sectorial Mcap Change



Market PE 13.5x
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	1,549	1,550	-0.64	-0.04%	36	738,260	10.7%	933.0	10.3%	6.9x	0.7x	GP	347,702	9.8%	63.2	11.6x	5.6x
NBFI	1,141	1,111	+30.60	+2.75%	23	108,550	1.6%	388.6	4.3%	NM	1.2x	SQURPHARMA	197,501	5.6%	177.0	7.6x	1.3x
Mutual Fund	541	537	+4.59	+0.86%	36	26,073	0.4%	113.9	1.3%	NM	0.5x	ROBI	170,233	4.8%	117.4	16.3x	2.4x
General Insurance	4,126	4,104	+22.06	+0.54%	43	116,572	1.7%	986.4	10.9%	18.7x	1.6x	BRACBANK	148,822	4.2%	301.3	7.5x	1.3x
Life Insurance	1,899	1,893	+6.59	+0.35%	15	53,540	0.8%	282.1	3.1%	NM	NM	WALTONHIL	125,691	3.5%	14.2	12.5x	1.0x
Telecommunication	4,702	4,672	+29.61	+0.63%	3	545,561	7.9%	183.9	2.0%	12.7x	3.6x	BATBC	115,992	3.3%	31.6	24.4x	2.1x
Pharmaceutical	3,155	3,152	+3.07	+0.10%	34	595,632	8.6%	1,251.9	13.8%	10.8x	1.5x	MARICO	86,546	2.4%	23.0	7.5x	29.9x
Fuel & Power	1,116	1,110	+5.97	+0.54%	23	294,614	4.3%	251.6	2.8%	9.5x	0.6x	UPGDCL	71,592	2.0%	6.0	7.7x	1.5x
Cement	2,059	2,051	+7.34	+0.36%	7	96,850	1.4%	82.1	0.9%	22.4x	2.1x	BERGERPBL	69,510	2.0%	9.3	18.7x	3.5x
Services & Real Estate	1,140	1,137	+3.54	+0.31%	9	62,036	0.9%	453.7	5.0%	22.1x	0.5x	BXPHERMA	63,303	1.8%	602.6	7.3x	1.1x
Engineering	2,620	2,609	+11.05	+0.42%	42	293,701	4.2%	1,298.9	14.4%	17.0x	0.9x	PUBALIBANK	55,597	1.6%	40.5	4.9x	0.7x
Food & Allied	12,315	12,336	-21.01	-0.17%	21	224,825	3.3%	350.3	3.9%	37.9x	3.4x	CITYBANK	53,182	1.5%	62.2	3.6x	0.8x
IT	2,464	2,421	+42.81	+1.77%	11	32,630	0.5%	640.5	7.1%	36.9x	2.0x	ISLAMIBANK	53,130	1.5%	9.4	NM	0.8x
Textile	1,271	1,262	+9.14	+0.72%	58	132,247	1.9%	914.8	10.1%	NM	0.9x	RENATA	51,051	1.4%	27.5	18.7x	1.4x
Paper & Printing	4,668	4,692	-23.86	-0.51%	6	21,863	0.3%	134.0	1.5%	NM	1.4x	DUTCHBANGL	45,169	1.3%	31.1	4.0x	0.7x
Tannery	2,089	2,078	+11.41	+0.55%	6	24,263	0.4%	63.6	0.7%	NM	1.5x	ICB	41,455	1.2%	64.1	NM	1.6x
Jute	11,767	11,698	+69.32	+0.59%	3	2,567	0.0%	5.8	0.1%	NM	1.6x	EBL	40,435	1.1%	115.9	4.7x	0.8x
Ceramics	479	482	-3.47	-0.72%	5	21,623	0.3%	102.0	1.1%	NM	1.4x	UNILEVERCL	39,715	1.1%	2.4	51.1x	16.8x
Miscellaneous	2,633	2,682	-48.30	-1.80%	15	142,990	2.1%	546.8	6.0%	56.4x	1.1x	PRIMEBANK	36,559	1.0%	27.7	4.0x	0.8x
Corporate Bond**	18,258	18,254	+4.45	+0.02%	16	40,395	0.6%	32.3	0.4%	NM	NM	POWERGRID	33,811	1.0%	6.7	8.4x	0.2x
Treasury Bond**	2,173	2,175	-2.10	-0.10%	232	3,338,075	48.3%	25.5	0.3%	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
NAHEEACP	36.3	+9.0%	69.4	NM	3.0x	SQURPHARMA	110,304	7.4%	7.6x	1.3x	BXPHERMA	141.9	-2.7%	602.6	7.3x	1.1x
SAIFPOWER	9.7	+9.0%	24.5	27.7x	0.6x	BRACBANK	80,111	5.4%	7.5x	1.3x	SAPORTL	51.1	-3.0%	330.4	24.1x	1.4x
REGENTTEX	6.2	+8.8%	3.9	NM	0.2x	ISLAMIBANK	53,034	3.5%	NM	0.8x	BRACBANK	65.0	-0.2%	301.3	7.5x	1.3x
SONARGAON	87.6	+7.9%	69.2	NM	4.8x	BXPHERMA	44,230	3.0%	7.3x	1.1x	ITC	44.8	+6.2%	244.1	13.5x	1.8x
MEGCONMILK	38.4	+7.3%	6.3	NM	NM	WALTONHIL	41,365	2.8%	12.5x	1.0x	BDTHAI	20.7	+3.5%	216.2	NM	0.8x
SHARPIND	22.3	+7.21%	45.9	NM	2.8x	PUBALIBANK	39,919	2.7%	4.9x	0.7x	NFML	22.2	+2.3%	211.8	NM	2.0x
AZIZPIPES	82.3	+6.9%	13.9	NM	NM	CITYBANK	37,031	2.5%	3.6x	0.8x	KDSALTD	54.0	+6.5%	211.7	25.0x	1.9x
KDSALTD	54.0	+6.5%	211.7	25.0x	1.9x	GP	34,770	2.3%	11.6x	5.6x	IPDC	30.3	+3.1%	190.4	26.9x	1.8x
ICB	47.8	+6.5%	64.1	NM	1.6x	BATBC	30,680	2.1%	24.4x	2.1x	DOMINAGE	74.2	-	181.4	NM	4.4x
ARAMIT	191.7	+6.3%	7.3	NM	1.5x	EBL	27,722	1.9%	4.7x	0.8x	SQURPHARMA	222.8	+0.9%	177.0	7.6x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEXIMCO	31.5	-9.7%	6.1	NM	0.4x	APEXSPINN	351.0	340.0	3.0	161	54.86
PLFSL	1.2	-7.7%	0.3	NM	NM	CITYGENINS	106.4	105.0	3.0	220	23.38
ILFSL	1.2	-6.3%	2.6	NM	NM	FINEFOODS	510.0	485.0	2.0	45	22.95
BAYLEASING	4.5	-6.3%	2.6	NM	NM	IPDC	30.0	29.1	4.0	754	22.41
FAREASTLIF	22.6	-5.0%	2.2	NM	NM	SAPORTL	57.0	53.5	7.0	401	21.54
ICBIBANK	2.7	-3.6%	0.3	NM	NM	SONALILIFE	84.8	83.0	5.0	220	18.43
PDL	5.6	-3.4%	1.3	NM	0.4x	MERCINS	38.8	38.5	3.0	434	16.72
TUNGHAI	2.9	-3.3%	0.8	NM	NM	TECHNODRUG	45.3	45.3	1.0	319	14.47
NURANI	2.9	-3.3%	0.4	NM	0.3x	PTL	68.2	56.0	4.0	196	12.72
EBLNRBMF	3.0	-3.2%	4.4	NM	0.3x	RAHIMTEXT	218.2	218.2	1.0	57	12.52

* 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
APEXSPINN	351.0	340.0	54.9	161	3
CITYGENINS	106.4	105.0	23.4	220	3
FINEFOODS	510.0	485.0	23.0	45	2
IPDC	30.0	29.1	22.4	754	4
SAPORTL	57.0	53.5	21.5	401	7
SONALLIFE	84.8	83.0	18.4	220	5
MERCINS	38.8	38.5	16.7	434	3
TECHNODRUG	45.3	45.3	14.5	319	1
PTL	68.2	56.0	12.7	196	4
RAHIMTEXT	218.2	218.2	12.5	57	1
ASIATICLAB	109.0	109.0	10.9	100	2
BNICL	116.1	112.9	10.1	88	3
EBL	23.1	22.9	9.3	406	3
NCCBANK	17.2	14.4	9.3	578	3
POPULARLIF	64.5	55.0	9.2	150	2
PROVATIINS	55.5	48.9	7.7	145	4
DOMINAGE	72.3	71.0	7.6	106	2
SONARGAON	82.0	79.0	6.8	85	3
LHB	57.0	57.0	4.6	80	1
SHARPIND	21.5	21.5	4.3	200	2
SONARBAINS	38.1	38.0	4.3	112	2
SPCL	48.4	48.3	4.0	83	2
Total			360.6		102

Important DSE News

BXPHERMA

(Q3 Un-audited): Consolidated EPS was Tk. 3.86 for January-March 2025 as against Tk. 3.06 for January-March 2024; Consolidated EPS was Tk. 11.73 for July 2024-March 2025 as against Tk. 9.75 for July 2023-March 2024. Consolidated NOCFPS was Tk. 9.46 for July 2024-March 2025 as against Tk. 14.79 for July 2023-March 2024. Consolidated NAV per share was Tk. 115.21 as on March 31, 2025 and Tk. 104.17 as on March 31, 2024.

The Board of Directors has recommended 47.5% Cash Dividend for the year ended June 30, 2025. Date & Time of AGM: The Annual General Meeting (AGM) will be convened at the earliest practicable time, subject to obtaining the necessary permission and condonation of delay from the Hon'ble High Court Division of the Supreme Court of Bangladesh. Record Date: 02.08.2026. The Company has also reported Consolidated EPS of Tk. 15.56, Consolidated NAV per share of Tk. 119.04, and Consolidated NOCFPS of Tk. 16.19 for the year ended June 30, 2025, as against Tk. 13.07, Tk. 107.48, and Tk. 18.75 respectively for the year ended June 30, 2024.

(Q1 Un-audited): Consolidated EPS was Tk. 5.30 for July-September 2025 as against Tk. 3.77 for July-September 2024. Consolidated NOCFPS was Tk. 6.14 for July-September 2025 as against Tk. 3.80 for July-September 2024. Consolidated NAV per share was Tk. 124.34 as on September 30, 2025 and Tk. 111.25 as on September 30, 2024. Reasons for significant deviations: The notable growth in net revenue during the reporting quarter compared to the corresponding prior period.

(Q2 Un-audited): Consolidated EPS was Tk. 5.28 for October-December 2025 as against Tk. 4.10 for October-December 2024; Consolidated EPS was Tk. 10.58 for July-December 2025 as against Tk. 7.87 for July-December 2024. Consolidated NOCFPS was Tk. 11.16 for July-December 2025 as against Tk. 6.13 for July-December 2024. Consolidated NAV per share was Tk. 129.63 as on December 31, 2025 and Tk. 111.35 as on December 31, 2024.

(Q3 Un-audited): Consolidated EPS was Tk. 4.98 for January-March 2026 as against Tk. 3.86 for January-March 2025; Consolidated EPS was Tk. 15.56 for July 2025-March 2026 as against Tk. 11.73 for July 2024-March 2025. Consolidated NOCFPS was Tk. 16.74 for July 2025-March 2026 as against Tk. 9.46 for July 2024-March 2025. Consolidated NAV per share was Tk. 134.60 as on March 31, 2026 and Tk. 115.21 as on March 31, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
UNIONINS		0.0%	10.0%	Record Date	25-Jun-26
PURABIGEN		0.0%	10.0%	Record Date	25-Jun-26
NORTHNRINS		5.0%	5.0%	Record Date	28-Jun-26
SUNLIFEINS		0.0%	0.0%	Record Date	5-Jul-26
DGIC		0.0%	2.0%	Record Date	7-Jul-26
BERGERPBL		0.0%	525.0%	Record Date	7-Jul-26
PRIMELIFE		0.0%	0.3%	Record Date	16-Jul-26
GLOBALINS		0.0%	10.0%	Record Date	20-Jul-26
SICL		0.0%	10.0%	Record Date	23-Jul-26
NHFIL		0.0%	10.0%	Record Date	23-Jul-26
BXPHERMA		0.0%	47.5%	Record Date	2-Aug-26

NHFIL

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2025. Date of AGM: 15.09.2026, Time: 12:00 PM, Venue/ Mode: Through Virtual Platform (Digitally). Record Date: 23.07.2026. The Company has also reported EPS of Tk. 0.74, NAV per share of Tk. 17.06 and NOCFPS of Tk. 6.89 for the year ended December 31, 2025 as against Tk. 0.02 (Restated), Tk. 16.32 (Restated) and Tk. (19.70) (Restated) respectively for the year ended December 31, 2024.

(Q1 Un-audited): EPS was Tk. 0.23 for January-March 2026 as against Tk. 0.22 (Restated) for January-March 2025. NOCFPS was Tk. 4.77 for January-March 2026 as against Tk. 8.61 (Restated) for January-March 2025. NAV per share was Tk. 17.29 as on March 31, 2026 and Tk. 17.06 (Restated) as on December 31, 2025. NOCFPS has decreased due to a reduction in customer deposits during this period, which adversely impacted operating cash inflows. As a result, NOCFPS registered a lower figure in Q1 2026.

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