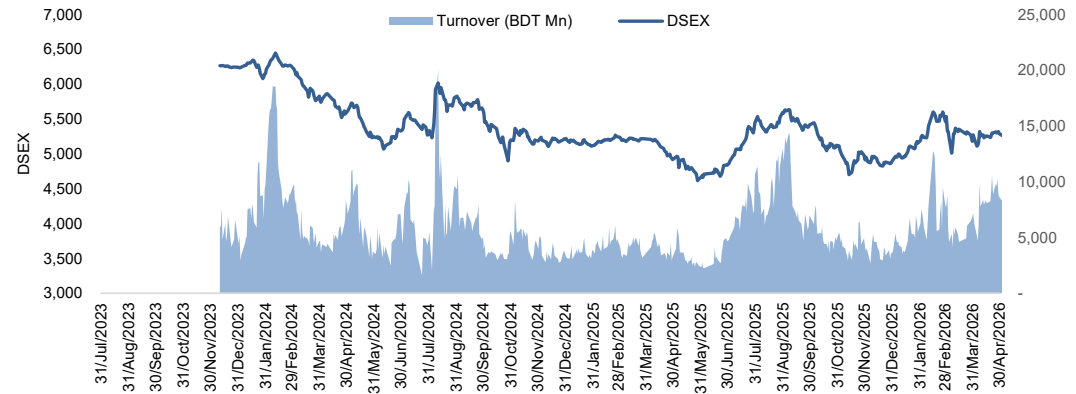


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.64%) gained 35.99 points and closed at 5,652.82. The blue-chip index DS30 (+0.17%), the Shariah-based index DSES (+0.29%), and the large-cap index CDSET (+0.12%) closed at 2,131.16, 1,143.65, and 1,125.52 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 1.32% followed by Food & Allied (+0.77%), Fuel & Power (+0.65%), Pharmaceutical (+0.28%), Bank (+0.01%), NBF1 (-0.22%), and Telecommunication (-0.27%), respectively. Block trades contributed 5.0% of the overall market turnover. Beximco Pharmaceuticals PLC. (-1.7%) was the most traded share with a turnover of BDT 460 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,652.82	5,616.83	+35.99	+0.64%	+16.2%
DS30	2,131.16	2,127.48	+3.67	+0.17%	+15.0%
DSES	1,143.65	1,140.32	+3.33	+0.29%	+14.3%
CDSET	1,125.52	1,124.21	+1.31	+0.12%	+12.0%

	Advanced	Declined	Unchanged	Total
All Category	273	68	54	395
A Category (Equity)	141	33	26	200
B Category (Equity)	66	8	1	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	66	27	27	120
Mutual Funds	13	5	16	34
Corporate Bonds	1	2	0	3
Treasury Bonds	2	5	0	7

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,925,268	6,908,679	+0.2%
	Mn USD	56,252	56,117	
Turnover	Mn BDT	11,107	9,402	+18.1%
	Mn USD	90	76	
Volume	Mn Shares	331	267	+24.1%
No. of Trade		245,814	223,987	+9.7%

\* Average Interbank Exchange Rate is BDT 123.11 as of Jun 25, 2026

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Figure: Sectorial Turnover (BDT Mn)

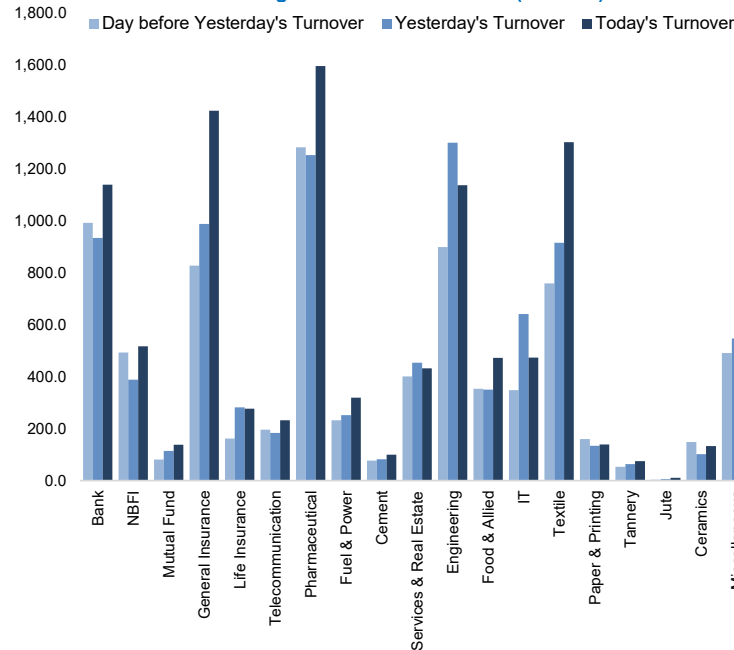
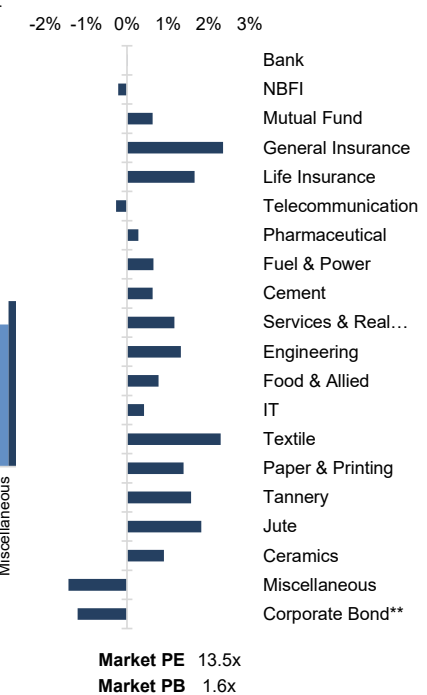


Figure: Sectorial Mcap Change



\* 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	1,549	+0.14	+0.01%	36	738,328	10.7%	1,137.8	10.8%	6.9x	0.7x	GP	347,162	9.7%	77.8	11.6x	5.5x
NBFI	1,139	1,141	-2.47	-0.22%	23	108,315	1.6%	516.6	4.9%	NM	1.2x	SQURPHARMA	198,654	5.6%	171.5	7.7x	1.3x
Mutual Fund	545	541	+3.40	+0.63%	36	26,236	0.4%	137.7	1.3%	NM	0.5x	ROBI	169,185	4.7%	133.8	16.2x	2.3x
General Insurance	4,223	4,126	+97.00	+2.35%	43	119,312	1.7%	1,422.3	13.5%	19.2x	1.7x	BRACBANK	149,509	4.2%	300.8	7.5x	1.3x
Life Insurance	1,931	1,899	+31.43	+1.65%	15	54,426	0.8%	276.6	2.6%	NM	NM	WALTONHIL	127,424	3.6%	6.2	12.7x	1.0x
Telecommunication	4,689	4,702	-12.55	-0.27%	3	544,104	7.9%	232.4	2.2%	12.7x	3.5x	BATBC	116,802	3.3%	30.3	24.6x	2.1x
Pharmaceutical	3,164	3,155	+8.84	+0.28%	34	597,300	8.6%	1,594.4	15.1%	10.9x	1.5x	MARICO	86,805	2.4%	53.5	7.6x	29.9x
Fuel & Power	1,123	1,116	+7.21	+0.65%	23	296,518	4.3%	318.7	3.0%	9.5x	0.6x	UPGDCL	71,592	2.0%	9.5	7.7x	1.5x
Cement	2,071	2,059	+12.95	+0.63%	7	97,460	1.4%	99.9	0.9%	22.6x	2.1x	BERGERPBL	69,927	2.0%	14.6	18.8x	3.6x
Services & Real Estate	1,153	1,140	+13.27	+1.16%	9	62,758	0.9%	431.7	4.1%	22.3x	0.5x	LHB	63,643	1.8%	45.5	13.1x	3.2x
Engineering	2,655	2,620	+34.57	+1.32%	42	297,576	4.3%	1,135.5	10.8%	17.2x	0.9x	PUBALIBANK	56,066	1.6%	11.9	5.0x	0.7x
Food & Allied	12,410	12,315	+95.06	+0.77%	21	226,560	3.3%	471.8	4.5%	38.2x	3.4x	CITYBANK	53,182	1.5%	89.7	3.6x	0.8x
IT	2,474	2,464	+10.25	+0.42%	11	32,766	0.5%	472.6	4.5%	37.0x	2.0x	ISLAMIBANK	52,969	1.5%	7.8	NM	0.8x
Textile	1,301	1,271	+29.14	+2.29%	58	135,279	2.0%	1,300.8	12.3%	NM	0.9x	RENATA	51,189	1.4%	21.0	18.8x	1.4x
Paper & Printing	4,732	4,668	+64.74	+1.39%	6	22,166	0.3%	138.5	1.3%	NM	1.5x	DUTCHBANGL	44,865	1.3%	30.8	3.9x	0.7x
Tannery	2,122	2,089	+32.81	+1.57%	6	24,644	0.4%	75.0	0.7%	NM	1.5x	ICB	40,935	1.1%	23.4	NM	1.5x
Jute	11,982	11,767	+214.14	+1.82%	3	2,613	0.0%	11.2	0.1%	NM	1.6x	EBL	40,599	1.1%	126.4	4.7x	0.8x
Ceramics	483	479	+4.32	+0.90%	5	21,819	0.3%	132.5	1.3%	NM	1.4x	UNILEVERCL	39,769	1.1%	1.9	51.1x	16.8x
Miscellaneous	2,596	2,633	-37.66	-1.43%	15	140,945	2.0%	636.7	6.0%	55.6x	1.1x	PRIMEBANK	36,437	1.0%	124.1	4.0x	0.8x
Corporate Bond**	18,037	18,258	-221.27	-1.21%	16	39,905	0.6%	2.3	0.0%	NM	NM	POWERGRID	34,633	1.0%	7.1	8.6x	0.3x
Treasury Bond**	2,175	2,173	+1.49	+0.07%	232	3,340,356	48.2%	7.1	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CENTRALPHL	9.9	+10.0%	57.6	NM	1.5x
PRAGATIINS	83.2	+9.9%	178.1	14.1x	1.4x
SHYAMPSUG	207.4	+9.7%	6.5	NM	NM
SONARGAON	96.0	+9.6%	120.5	NM	5.3x
SAIFPOWER	10.6	+9.3%	57.3	30.3x	0.6x
GREENDELMF	3.8	+8.57%	5.3	NM	0.4x
ARAMIT	207.9	+8.5%	17.2	NM	2x
NFML	24.0	+8.1%	323.5	NM	2.2x
PROVATIINS	58.9	+7.9%	145.7	32.0x	2.6x
DULAMIACOT	191.7	+6.5%	9.5	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	110,948	7.4%	7.7x	1.3x
BRACBANK	80,480	5.4%	7.5x	1.3x
ISLAMIBANK	52,873	3.5%	NM	0.8x
BXPHARMA	43,482	2.9%	7.2x	1.0x
WALTONHIL	41,935	2.8%	12.7x	1.0x
PUBALIBANK	40,255	2.7%	5.0x	0.7x
CITYBANK	37,031	2.5%	3.6x	0.8x
GP	34,716	2.3%	11.6x	5.5x
BATBC	30,894	2.1%	24.6x	2.1x
EBL	27,835	1.9%	4.7x	0.8x
RENATA	24,934	1.7%	18.8x	1.4x
LHB	23,300	1.5%	13.1x	3.2x
PRIMEBANK	22,762	1.5%	4.0x	0.8x
OLYMPIC	19,306	1.3%	16.2x	2.3x
UTTARABANK	18,659	1.2%	NM	0.8x
BEXIMCO	17,918	1.2%	NM	0.3x
ROBI	16,919	1.1%	16.2x	2.3x
BEACONPHAR	15,184	1.0%	17.3x	3.3x
BSRMLTD	15,110	1.0%	4.4x	0.5x
ALARABANK	13,981	0.9%	17.0x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BXPHARMA	139.5	-1.7%	460.1	7.2x	1.0x
IPDC	30.9	+2.0%	355.5	27.4x	1.8x
NFML	24.0	+8.1%	323.5	NM	2.2x
ASIATICLAB	124.8	+0.2%	312.7	28.7x	2.2x
BRACBANK	65.3	+0.5%	300.8	7.5x	1.3x
SAPORTL	52.8	+3.3%	286.3	24.9x	1.5x
MALEKSPIN	32.4	+6.2%	256.9	5.7x	0.5x
BDTHAI	22.0	+6.3%	224.0	NM	0.8x
NCCBANK	16.0	+0.6%	197.4	3.2x	0.6x
PRAGATIINS	83.2	+9.9%	178.1	14.1x	1.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	28.4	-9.8%	9.4	NM	0.3x
PREMIERLEA	2.2	-8.3%	1.0	NM	NM
ILFSL	1.1	-7.7%	0.6	NM	NM
FASFIN	1.2	-7.7%	0.6	NM	NM
ALARABANK	14.3	-5.9%	4.9	17.0x	0.7x
FAMILYTEX	2.6	-3.7%	2.2	NM	0.2x
PRIMEFIN	3.0	-3.2%	1.9	NM	0.4x
POPULAR1MF	3.1	-3.1%	1.1	NM	0.3x
GSPFINANCE	3.4	-2.9%	0.9	NM	NM
EXIM1STMF	3.4	-2.9%	3.0	NM	0.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CITYGENINS	106.5	95.9	6.0	1,055	109.97
PTL	62.5	62.5	2.0	1,532	95.72
FINEFOODS	530.0	480.0	5.0	140	69.75
BEACONPHAR	109.9	109.9	1.0	400	43.96
DOMINAGE	74.6	68.0	16.0	553	38.64
NORTHNRINS	36.7	36.7	1.0	579	21.25
APEXSPINN	365.8	345.0	3.0	53	18.68
BNICL	123.0	123.0	1.0	150	18.45
NFML	22.6	22.5	7.0	662	14.90
LHB	50.0	50.0	1.0	230	11.50

\* 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
CITYGENINS	106.5	95.9	110.0	1,055	6
PTL	62.5	62.5	95.7	1,532	2
FINEFOODS	530.0	480.0	69.8	140	5
BEACONPHAR	109.9	109.9	44.0	400	1
DOMINAGE	74.6	68.0	38.6	553	16
NORTHRNINS	36.7	36.7	21.3	579	1
APEXSPINN	365.8	345.0	18.7	53	3
BNICL	123.0	123.0	18.5	150	1
NFML	22.6	22.5	14.9	662	7
LHB	50.0	50.0	11.5	230	1
SAPORTL	56.2	46.2	11.5	236	4
EBL	23.2	23.1	8.6	370	2
DULAMIACOT	187.0	187.0	7.9	42	3
SONALILIFE	93.2	93.2	5.9	63	2
NAVANAPHAR	75.8	75.2	5.3	71	4
GP	257.8	257.8	5.3	20	1
SHARPIND	21.8	21.0	4.9	225	3
ONEBANKPLC	8.2	8.2	4.7	571	1
PEOPLESINS	67.1	67.1	4.7	70	1
SQURPHARMA	218.1	218.1	4.2	19	1
KARNAPHULI	40.9	37.0	3.9	102	2
PRAGATIINS	77.5	73.7	3.0	40	4
<b>Total</b>			<b>555.6</b>		<b>111</b>

**Important DSE News**

**BIFC**

The Board of Directors has recommended No Dividend for the year ended December 31, 2025. Date, Time and Venue of AGM: To be notified later. Record Date: 30.07.2026. The Company has also reported EPS of Tk. (7.38), NAV per share of Tk. (133.58) and NOCFPS of Tk. (0.03) for the year ended December 31, 2025 as against Tk. (6.66), Tk. (126.11) and Tk. (0.01) respectively for the year ended December 31, 2024.

**(Q1 Un-audited):** EPS was Tk. (1.81) for January-March 2026 as against Tk. (1.65) for January-March 2025. NOCFPS was Tk. (0.02) for January-March 2026 as against Tk. (0.06) for January-March 2025. NAV per share was Tk. (135.39) as on March 31, 2026 and Tk. (127.76) as on March 31, 2025.

**ISLAMIINS**

The Board of Directors has recommended 16% Cash Dividend for the year ended December 31, 2025. Date of AGM: 27.08.2026, Time: 11:00 AM, Venue/ Mode: Digital Platform. Record Date: 20.07.2026. The Company has also reported EPS of Tk. 3.04, NAV per share of Tk. 23.62 and NOCFPS of Tk. 0.40 for the year ended December 31, 2025 as against Tk. 3.41, Tk. 22.56 and Tk. 1.60 respectively for the year ended December 31, 2024.

**(Q1 Un-audited):** EPS was Tk. 1.02 for January-March 2026 as against Tk. 0.80 for January-March 2025. NOCFPS was Tk. 1.48 for January-March 2026 as against Tk. 0.12 for January-March 2025. NAV per share was Tk. 24.67 as on March 31, 2026 and Tk. 23.62 as on December 31, 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
NORTHRNINS		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
PRAGATILIF		10.0%	15.0%	Record Date	14-Jul-26
PRIMELIFE		0.0%	0.3%	Record Date	16-Jul-26
GLOBALINS		0.0%	10.0%	Record Date	20-Jul-26
ISLAMIINS		0.0%	16.0%	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
BIFC		0.0%	0.0%	Record Date	30-Jul-26
EXPHARMA		0.0%	47.5%	Record Date	2-Aug-26

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