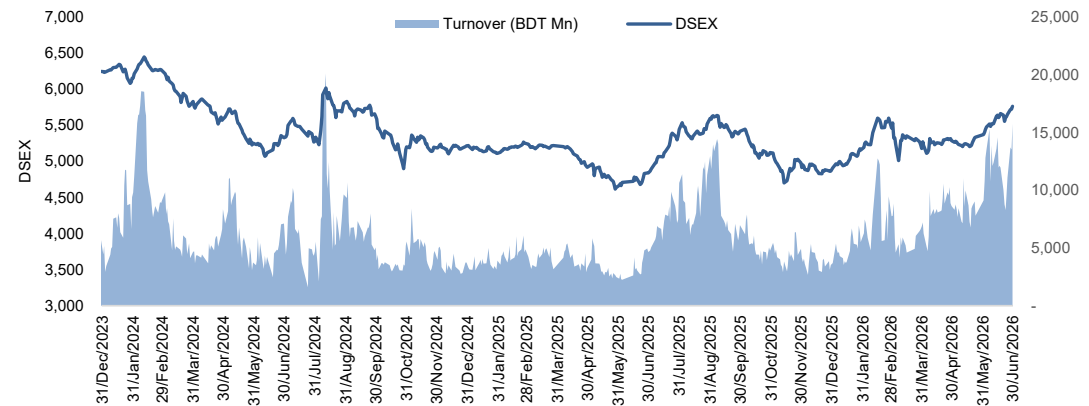


Daily Market Update

Market closed in green

The market closed in green today. The benchmark index DSEX (+0.70%) gained 40.29 points and closed at 5,762.83. The blue-chip index DS30 (+0.55%), the Shariah-based index DSES (+0.98%), and the large-cap index CDSET (+0.61%) closed at 2,178.38, 1,168.13, and 1,148.64 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 3.20% followed by NBF1 (+0.66%), Fuel & Power (+0.66%), Pharmaceutical (+0.30%), Bank (+0.11%), Food & Allied (+0.06%), and Telecommunication (-0.24%), respectively. Block trades contributed 4.7% of the overall market turnover. BRAC Bank PLC. (-1.2%) was the most traded share with a turnover of BDT 749 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,762.83	5,722.54	+40.29	+0.70%	+18.4%
DS30	2,178.38	2,166.46	+11.92	+0.55%	+17.5%
DSES	1,168.13	1,156.73	+11.39	+0.98%	+16.7%
CDSET	1,148.64	1,141.72	+6.92	+0.61%	+14.3%

	Advanced	Declined	Unchanged	Total
All Category	249	94	54	397
A Category (Equity)	144	43	16	203
B Category (Equity)	50	18	7	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	55	33	31	119
Mutual Funds	26	1	7	34
Corporate Bonds	2	1	0	3
Treasury Bonds	4	4	0	8

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,986,923	6,976,834	+0.1%
	Mn USD	56,546	56,464	
Turnover	Mn BDT	15,737	13,515	+16.4%
	Mn USD	127	109	
Volume	Mn Shares	475	404	+17.4%
No. of Trade		314,848	297,770	+5.7%

* Average Interbank Exchange Rate is BDT 123.56 as of Jun 30, 2026

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Figure: Sectorial Turnover (BDT Mn)

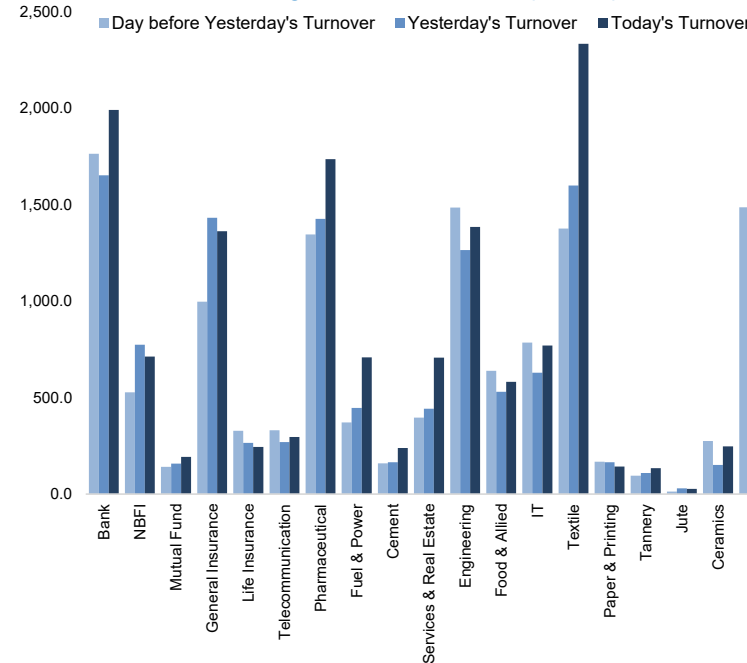
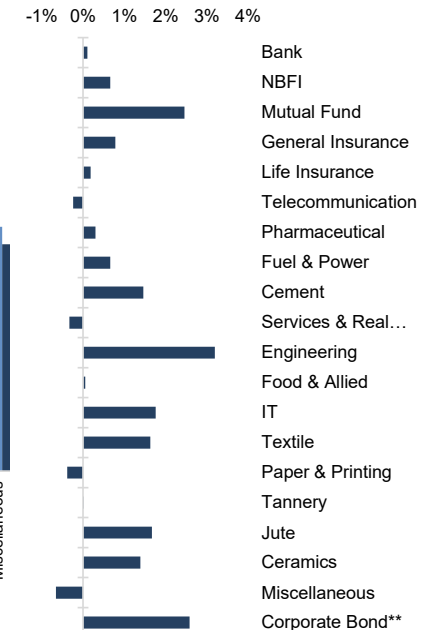


Figure: Sectorial Mcap Change



Market PE 13.8x

Market PB 1.7x

* 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	1,569	1,568	+1.65	+0.11%	36	747,865	10.7%	1,990.4	13.3%	7.0x	0.7x	GP	350,538	9.6%	81.6	11.7x	5.6x
NBFI	1,149	1,142	+7.52	+0.66%	23	109,294	1.6%	712.8	4.8%	NM	1.2x	SQRPHARMA	198,565	5.5%	247.5	7.7x	1.3x
Mutual Fund	560	546	+13.44	+2.46%	36	26,968	0.4%	193.0	1.3%	NM	0.5x	ROBI	170,757	4.7%	117.5	16.4x	2.4x
General Insurance	4,281	4,247	+33.23	+0.78%	43	120,944	1.7%	1,361.8	9.1%	19.5x	1.7x	BRACBANK	149,967	4.1%	748.6	7.5x	1.3x
Life Insurance	1,927	1,923	+3.51	+0.18%	15	54,316	0.8%	244.5	1.6%	NM	NM	WALTONHIL	133,655	3.7%	49.4	13.3x	1.1x
Telecommunication	4,746	4,758	-11.44	-0.24%	3	550,753	7.9%	296.1	2.0%	12.8x	3.6x	BATBC	118,584	3.3%	59.3	25.0x	2.1x
Pharmaceutical	3,196	3,187	+9.53	+0.30%	34	603,318	8.6%	1,735.5	11.6%	11.0x	1.5x	MARICO	87,293	2.4%	22.6	7.6x	30.1x
Fuel & Power	1,150	1,143	+7.51	+0.66%	23	303,646	4.3%	707.8	4.7%	9.8x	0.6x	UPGDCL	71,824	2.0%	22.1	7.7x	1.5x
Cement	2,143	2,112	+30.90	+1.46%	7	100,807	1.4%	239.1	1.6%	23.4x	2.2x	BERGERPBL	70,109	1.9%	39.4	18.8x	3.6x
Services & Real Estate	1,154	1,157	-3.84	-0.33%	9	62,773	0.9%	707.6	4.7%	25.6x	0.5x	LHB	65,037	1.8%	127.7	13.4x	3.2x
Engineering	2,772	2,686	+85.84	+3.20%	42	310,721	4.4%	1,383.6	9.2%	18.0x	0.9x	PUBALIBANK	57,628	1.6%	20.8	5.1x	0.8x
Food & Allied	12,585	12,578	+7.07	+0.06%	21	229,747	3.3%	581.9	3.9%	38.7x	3.5x	CITYBANK	55,981	1.5%	278.2	3.8x	0.8x
IT	2,553	2,509	+44.21	+1.76%	11	33,809	0.5%	770.2	5.1%	38.2x	2.0x	RENATA	52,302	1.4%	32.3	19.2x	1.4x
Textile	1,344	1,323	+21.55	+1.63%	58	139,847	2.0%	2,333.0	15.6%	NM	0.9x	ISLAMIBANK	51,198	1.4%	10.7	NM	0.7x
Paper & Printing	4,797	4,815	-18.46	-0.38%	6	22,468	0.3%	142.4	0.9%	NM	1.5x	DUTCHBANGL	45,068	1.2%	86.8	4.0x	0.7x
Tannery	2,118	2,118	+0.30	+0.01%	6	24,595	0.4%	133.6	0.9%	NM	1.5x	EBL	40,928	1.1%	115.8	4.8x	0.8x
Jute	12,599	12,392	+206.97	+1.67%	3	2,748	0.0%	27.0	0.2%	NM	1.7x	UNILEVERCL	40,355	1.1%	7.5	51.9x	17.1x
Ceramics	498	491	+6.81	+1.39%	5	22,483	0.3%	246.9	1.6%	NM	1.5x	ICB	39,894	1.1%	15.0	NM	1.5x
Miscellaneous	2,620	2,637	-17.34	-0.66%	15	142,256	2.0%	1,174.6	7.8%	56.1x	1.1x	PRIMEBANK	36,559	1.0%	78.2	4.0x	0.8x
Corporate Bond**	18,931	18,454	+476.85	+2.58%	16	41,884	0.6%	4.7	0.0%	NM	NM	POWERGRID	36,187	1.0%	11.3	8.9x	0.3x
Treasury Bond**	2,174	2,181	-6.38	-0.29%	232	3,339,849	47.8%	6.1	0.0%	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
BSRMLTD	105.6	+10.0%	121.9	4.8x	0.6x	SQRPHARMA	110,899	7.2%	7.7x	1.3x	BRACBANK	65.5	-1.2%	748.6	7.5x	1.3x
ZEALBANGLA	148.8	+10.0%	7.9	NM	NM	BRACBANK	80,727	5.3%	7.5x	1.3x	BEXIMCO	29.3	-4.6%	607.9	NM	0.4x
TAKAFULINS	44.2	+10.0%	22.1	31.3x	2.2x	ISLAMIBANK	51,106	3.3%	NM	0.7x	MALEKSPIN	36.7	+7.9%	575.0	6.5x	0.6x
SILVAPHL	15.6	+9.9%	104.5	NM	1.1x	WALTONHIL	43,986	2.9%	13.3x	1.1x	SAPORTL	52.8	+2.5%	449.0	24.9x	1.5x
USMANIAGL	46.0	+9.8%	7.1	NM	0.8x	BXPBARMA	43,825	2.9%	7.3x	1.0x	IPDC	32.9	+1.2%	393.6	29.2x	1.9x
FEKDIL	19.6	+9.50%	273.2	NM	1.0x	PUBALIBANK	39,262	2.6%	5.1x	0.8x	ITC	48.4	+1.0%	321.8	14.5x	2.0x
SHYAMPSUG	250.8	+8.7%	7.5	NM	NM	CITYBANK	38,980	2.5%	3.8x	0.8x	BXPBARMA	140.6	-0.5%	301.8	7.3x	1.0x
MALEKSPIN	36.7	+7.9%	575.0	6.5x	0.6x	GP	35,054	2.3%	11.7x	5.6x	CITYBANK	32.0	+0.3%	278.2	3.8x	0.8x
FASFIN	1.4	+7.7%	0.5	NM	NM	BATBC	31,365	2.0%	25.0x	2.1x	FEKDIL	19.6	+9.5%	273.2	NM	1.0x
MEGCONMILK	41.1	+7.6%	10.2	NM	NM	EBL	28,060	1.8%	4.8x	0.8x	SQRPHARMA	224.0	-0.4%	247.5	7.7x	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)
BESTHLDNG	14.9	-5.1%	32.6	53.2x	0.3x	CITYGENINS	106.2	96.5	6.0	946	99.91
AOL	18.4	-4.7%	36.4	NM	1x	ENVOYTEX	55.0	52.0	2.0	1,416	77.67
BEXIMCO	29.3	-3.6%	0.8	NM	NM	MALEKSPIN	34.5	32.5	9.0	1,800	59.02
ICBIBANK	2.7	-3.6%	0.8	NM	NM	DHAKABANK	12.5	12.5	1.0	4,000	50.00
PROGRESLIF	42.4	-3.4%	0.7	NM	NM	ASIATICLAB	125.5	125.1	3.0	399	49.93
BDWELDING	14.6	-3.3%	3.0	NM	1.3x	APEXSPINN	385.0	360.0	11.0	120	43.55
PRIMEFIN	3.0	-3.2%	2.9	NM	NM	IPDC	33.0	30.5	5.0	1,115	36.18
KPPL	15.7	-3.1%	6.8	NM	NM	FEKDIL	18.5	17.4	8.0	1,500	27.13
SUNLIFEINS	71.5	-3.0%	44.6	NM	NM	MERCINS	41.2	41.0	3.0	632	25.91
WMSHIPYARD	10.2	-2.9%	15.8	NM	0.6x	JAMUNABANK	24.5	24.0	4.0	1,007	24.47

* 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	106.2	96.5	99.9	946	6
ENVOYTEX	55.0	52.0	77.7	1,416	2
MALEKSPIN	34.5	32.5	59.0	1,800	9
DHAKABANK	12.5	12.5	50.0	4,000	1
ASIATICLAB	125.5	125.1	49.9	399	3
APEXSPINN	385.0	360.0	43.6	120	11
IPDC	33.0	30.5	36.2	1,115	5
FEKDIL	18.5	17.4	27.1	1,500	8
MERCINS	41.2	41.0	25.9	632	3
JAMUNABANK	24.5	24.0	24.5	1,007	4
BRACBANK	65.5	59.7	21.4	338	5
SHYAMPSUG	232.1	230.0	21.3	92	15
FINEFOODS	552.2	480.0	17.8	35	8
PF1STMF	8.8	8.4	17.8	2,100	3
ITC	46.1	46.0	12.4	270	2
DOMINAGE	79.4	75.6	11.4	147	4
PREMIERCEM	50.0	50.0	10.0	200	1
SONALILIFE	91.9	75.6	9.5	116	4
DAFODILCOM	152.0	151.9	8.7	58	4
GQBALLPEN	668.2	600.0	8.1	13	5
PRIMEINSUR	46.0	43.5	8.1	184	3
PRIMEBANK	30.0	30.0	7.5	250	2
Total			743.3		178

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SUNLIFEINS		0.0%	0.0%	Record Date	05-Jul-26
DGIC		0.0%	2.0%	Record Date	07-Jul-26
BERGERPBL		0.0%	525.0%	Record Date	07-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
POPULARLIF		0.0%	20.0%	Record Date	20-Jul-26
CLICL		0.0%	4.0%	Record Date	22-Jul-26
FIRSTFIN		0.0%	0.0%	Record Date	22-Jul-26
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
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	02-Aug-26

Important DSE News

PRIMEFIN

(Q1 Un-audited): Consolidated EPS was Tk. (0.61) for January-March 2024 as against Tk. (0.29) for January-March 2023. Consolidated NOCFPS was Tk. (0.30) for January-March 2024 as against Tk. (0.37) for January-March 2023. Consolidated NAV per share was Tk. 0.85 as on March 31, 2024 and Tk. 6.71 as on March 31, 2023.

(Q2 Un-audited): Consolidated EPS was Tk. (1.24) for April-June 2024 as against Tk. (0.79) for April-June 2023; Consolidated EPS was Tk. (1.85) for January-June 2024 as against Tk. (1.08) for January-June 2023. Consolidated NOCFPS was Tk. (0.34) for January-June 2024 as against Tk. (0.46) for January-June 2023. Consolidated NAV per share was Tk. (0.39) as on June 30, 2024 and Tk. 5.92 as on June 30, 2023.

(Q3 Un-audited): Consolidated EPS was Tk. (1.00) for July-September 2024 as against Tk. (0.61) for July-September 2023; Consolidated EPS was Tk. (2.85) for January-September 2024 as against Tk. (1.69) for January-September 2023. Consolidated NOCFPS was Tk. (0.26) for January-September 2024 as against Tk. (0.45) for January-September 2023. Consolidated NAV per share was Tk. (1.39) as on September 30, 2024 and Tk. 5.31 as on September 30, 2023.

PHOENIXFIN

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 27.08.2026, Time: 11:30 AM, Venue: Hybrid system physically at Muktijuddho Smrity Milonayaton (1st floor), Institution of Diploma Engineers, Bangladesh, 160/A, Kakrail, VIP Road, Dhaka and Digital Link: [https:// phoenixfinance.bdvirtualagm.com](https://phoenixfinance.bdvirtualagm.com). Record Date: 23.07.2026. The Company has also reported EPS of Tk. (20.45), NAV per share of Tk. (102.46) and NOCFPS of Tk. 1.22 for the year ended December 31, 2025 as against Tk. (48.73), Tk. (82.01) and Tk. 0.28 respectively for the year ended December 31, 2024.

(Q1 Un-audited): Consolidated EPS was Tk. (0.61) for January-March 2024 as against Tk. (0.29) for January-March 2023. Consolidated NOCFPS was Tk. (0.30) for January-March 2024 as against Tk. (0.37) for January-March 2023. Consolidated NAV per share was Tk. 0.85 as on March 31, 2024 and Tk. 6.71 as on March 31, 2023.

BESTHLNG

The Board of Directors has recommended No dividend for the year ended June 30, 2025. Date and Time of the AGM: Will be notified after the order by the Honorable Court, Venue: Will be notified through the AGM notice. Record Date: Will be notified after the order by the Honorable Court. The Company has also reported consolidated EPS (Basic) of Tk. 0.30, consolidated EPS (Diluted) of Tk. 0.28, consolidated NAV per share of Tk. 53.56 and consolidated NOCFPS of Tk. 1.39 for the year ended June 30, 2025 as against Tk. 1.43, Tk. 1.37, Tk. 57.82 and Tk. 1.82 respectively for the year ended June 30, 2024.

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