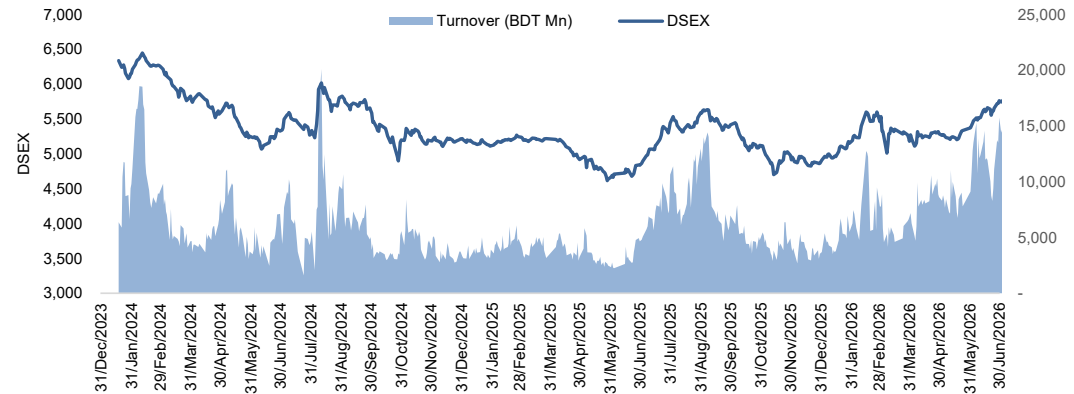


Daily Market Update

The market closed flat today. The benchmark index DSEX (+0.00%) gained 0.2 points and closed at 5,895.78. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (-0.22%), and the large-cap index CDSET (-0.23%) closed at 2,213.34, 1,192.61, and 1,158.16 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.24%, followed by Engineering (+0.22%), Pharmaceutical (+0.06%), NBFI (-0.14%), Food & Allied (-0.16%), Telecommunication (-0.18%), and Bank (-0.44%), respectively. Block trades contributed 2.6% of the overall market turnover. Malek Spinning Mills PLC. (+6.1%) was the most traded share with a turnover of BDT 418 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,895.78	5,895.58	+0.20	+0.00%	+21.2%
DS30	2,213.34	2,217.22	-3.89	-0.18%	+19.4%
DSES	1,192.61	1,195.24	-2.63	-0.22%	+19.2%
CDSET	1,158.16	1,160.80	-2.64	-0.23%	+15.3%

	Advanced	Declined	Unchanged	Total
All Category	193	149	45	387
A Category (Equity)	95	86	11	192
B Category (Equity)	43	24	7	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	55	39	27	121
Mutual Funds	32	1	1	34
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,061,148	7,051,339	+0.1%
	Mn USD	56,984	56,905	
Turnover	Mn BDT	12,576	10,434	+20.5%
	Mn USD	101	84	
Volume	Mn Shares	514	389	+32.4%
No. of Trade		291,079	247,542	+17.6%

* Average Interbank Exchange Rate is BDT 123.92 as of Aug 02, 2026

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Figure: Sectorial Turnover (BDT Mn)

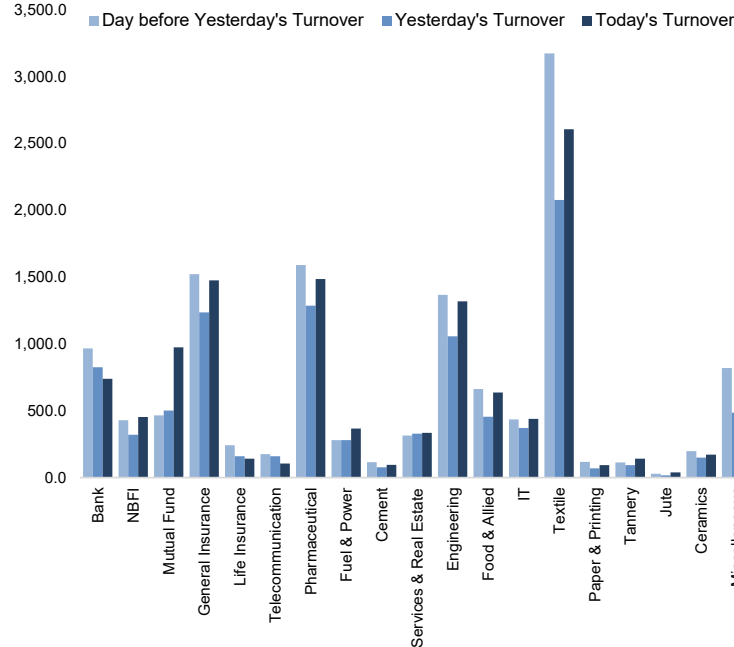
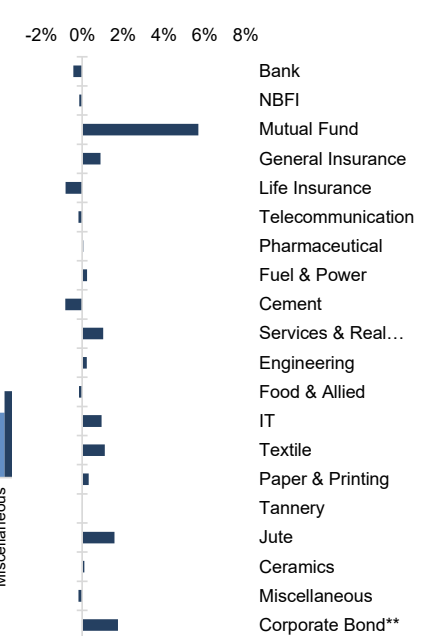


Figure: Sectorial Mcap Change



Market PE 13.9x

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	1,578	1,585	-6.90	-0.44%	36	752,011	10.7%	738.7	6.0%	7.4x	0.8x	GP	350,673	9.4%	25.1	9.9x	6.3x
NBFI	1,212	1,214	-1.64	-0.14%	23	115,283	1.6%	452.8	3.7%	NM	1.2x	SQURPHARMA	194,842	5.3%	57.0	7.5x	1.3x
Mutual Fund	730	691	+39.32	+5.69%	34	33,983	0.5%	973.2	7.9%	NM	0.6x	ROBI	167,090	4.5%	70.3	16.0x	2.5x
General Insurance	4,450	4,410	+39.55	+0.90%	43	125,716	1.8%	1,473.6	12.0%	18.6x	1.7x	BRACBANK	145,845	3.9%	102.9	6.4x	1.3x
Life Insurance	1,892	1,907	-15.38	-0.81%	15	53,322	0.8%	141.0	1.2%	NM	NM	BATBC	136,026	3.7%	95.4	23.4x	2.4x
Telecommunication	4,715	4,723	-8.58	-0.18%	3	547,072	7.8%	105.3	0.9%	11.3x	3.9x	WALTONHIL	130,989	3.5%	6.1	13.0x	1.1x
Pharmaceutical	3,216	3,214	+1.81	+0.06%	34	607,055	8.6%	1,484.8	12.1%	11.1x	1.5x	MARICO	85,661	2.3%	15.8	7.6x	18.6x
Fuel & Power	1,181	1,179	+2.82	+0.24%	23	311,862	4.4%	366.9	3.0%	10.0x	0.6x	BERGERPBL	73,551	2.0%	90.6	15.7x	3.4x
Cement	2,185	2,204	-18.25	-0.83%	7	102,823	1.5%	94.7	0.8%	23.9x	2.3x	UPGDCL	73,100	2.0%	3.8	7.9x	1.5x
Services & Real Estate	1,220	1,208	+12.37	+1.02%	9	66,393	0.9%	334.5	2.7%	27.0x	0.5x	LHB	67,476	1.8%	67.5	13.7x	3.6x
Engineering	2,816	2,810	+6.24	+0.22%	42	315,640	4.5%	1,317.6	10.8%	17.8x	0.9x	PUBALIBANK	60,907	1.6%	15.8	5.1x	0.8x
Food & Allied	13,501	13,522	-21.23	-0.16%	21	246,473	3.5%	636.3	5.2%	36.1x	3.6x	CITYBANK	54,931	1.5%	115.9	3.6x	0.8x
IT	2,689	2,663	+25.42	+0.95%	11	35,607	0.5%	438.2	3.6%	46.3x	2.2x	RENATA	53,861	1.5%	28.0	19.7x	1.5x
Textile	1,506	1,490	+16.58	+1.11%	58	156,686	2.2%	2,603.8	21.3%	NM	1.1x	DUTCHBANGL	49,635	1.3%	59.7	3.8x	0.8x
Paper & Printing	4,902	4,887	+15.82	+0.32%	6	22,962	0.3%	92.9	0.8%	NM	1.5x	ISLAMIBANK	49,266	1.3%	3.8	NM	0.8x
Tannery	2,243	2,243	-0.08	-0.00%	6	26,050	0.4%	142.5	1.2%	NM	1.6x	ICB	39,981	1.1%	6.2	NM	1.5x
Jute	13,610	13,398	+211.54	+1.58%	3	2,969	0.0%	38.2	0.3%	NM	1.9x	EBL	39,777	1.1%	31.5	4.4x	0.8x
Ceramics	512	511	+0.55	+0.11%	5	23,116	0.3%	171.6	1.4%	NM	1.5x	UNILEVERCL	39,366	1.1%	1.6	64.3x	24.1x
Miscellaneous	2,613	2,618	-4.89	-0.19%	15	141,910	2.0%	645.7	5.3%	40.5x	1.1x	POWERGRID	37,466	1.0%	6.7	9.3x	0.3x
Corporate Bond**	18,489	18,169	+319.77	+1.76%	16	40,906	0.6%	0.0	0.0%	NM	NM	BSRMSTEEL	37,332	1.0%	141.6	6.2x	1.0x
Treasury Bond**	2,167	2,167	+0.04	+0.00%	232	3,328,624	47.2%	0.0	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
GREENDELMF	5.5	+10.0%	27.5	NM	0.6x	SQURPHARMA	108,819	6.9%	7.5x	1.3x	MALEKSPIN	46.9	+6.1%	418.4	8.3x	0.7x
USMANIAGL	69.9	+9.9%	7.8	NM	1.1x	BRACBANK	78,509	5.0%	6.4x	1.3x	ACIFORMULA	178.9	+4.0%	246.9	24.0x	2.2x
PRIMEINSUR	55.6	+9.9%	176.1	25.2x	2.6x	ISLAMIBANK	49,177	3.1%	NM	0.8x	ASIATICLAB	123.4	-0.5%	232.2	28.4x	2.1x
QUEENSOUTH	19.4	+9.6%	173.0	NM	1.2x	BXPHARMA	47,035	3.0%	7.8x	1.1x	BEXIMCO	23.2	-	219.8	NM	0.3x
ICBSONALI1	6.9	+9.5%	33.5	NM	0.6x	WALTONHIL	43,109	2.8%	13.0x	1.1x	SAPORTL	57.5	+4.0%	215.8	27.1x	1.6x
GLDNJMF	9.4	+9.30%	49.4	NM	0.9x	PUBALIBANK	41,496	2.6%	5.1x	0.8x	ITC	51.2	-1.5%	205.9	15.4x	2.1x
CAPITECGBF	10.8	+9.1%	101.7	NM	1x	CITYBANK	38,249	2.4%	3.6x	0.8x	SHARPIND	37.1	+5.7%	200.6	NM	4.7x
ICBEPMF1S1	7.2	+9.1%	51.0	NM	0.6x	BATBC	35,979	2.3%	23.4x	2.4x	COPPERTECH	29.7	+6.5%	197.9	43.7x	2.0x
LRGLOBMF1	5.0	+8.7%	16.8	NM	0.6x	GP	35,067	2.2%	9.9x	6.3x	IPDC	33.1	+2.8%	193.0	27.8x	1.9x
FASFIN	2.6	+8.3%	9.8	NM	NM	EBL	27,271	1.7%	4.4x	0.8x	SAIHAMCOT	23.1	+0.9%	187.9	25.4x	0.6x
						RENATA	26,236	1.7%	19.7x	1.5x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	24,703	1.6%	13.7x	3.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SALAMCRST	12.9	-7.9%	15.7	67.9x	0.7x	PRIMEBANK	22,990	1.5%	4.0x	0.8x	DOMINAGE	83.2	78.0	19.0	1,347	106.06
BIFC	4.6	-6.1%	1.7	NM	NM	OLYMPIC	19,218	1.2%	16.2x	2.3x	GQBALLPEN	580.0	580.0	1.0	60	34.80
SIPLC	124.8	-4.1%	2.3	NM	NM	UTTARABANK	17,946	1.1%	NM	0.8x	BRACBANK	63.0	63.0	1.0	500	31.50
UNIONCAP	4.7	-4.1%	2.3	NM	NM	ROBI	16,709	1.1%	16.0x	2.5x	APEXSPINN	390.0	370.0	3.0	77	29.73
MERCANBANK	7.2	-4.0%	17.4	NM	0.3x	BSRMLTD	16,468	1.1%	4.8x	0.6x	SAIHAMTEX	24.8	24.0	7.0	907	22.46
ORIONINFU	271.9	-4.0%	125.3	NM	16.8x	ALARABANK	16,132	1.0%	21.2x	0.8x	MLDYEING	18.0	18.0	2.0	796	14.33
GQBALLPEN	586.6	-3.8%	63.1	NM	4.2x	BEACONPHAR	15,073	1.0%	17.2x	3.2x	PRIMEINSUR	51.9	50.1	5.0	223	11.23
APEXSPINN	355.8	-3.7%	19.8	NM	4.2x	BEXIMCO	14,638	0.9%	NM	0.3x	DAFODILCOM	166.7	165.0	5.0	58	9.71
SONARGAON	105.4	-3.6%	36.6	NM	5.8x						SHARPIND	35.4	35.2	3.0	220	7.76
ANLIMAYARN	32.9	-3.5%	2.4	NM	11.6x						MALEKSPIN	48.6	43.0	4.0	148	6.59

* 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

* 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	83.2	78.0	106.1	1,347	19
GQBALLPEN	580.0	580.0	34.8	60	1
BRACBANK	63.0	63.0	31.5	500	1
APEXSPINN	390.0	370.0	29.7	77	3
SAIHAMTEX	24.8	24.0	22.5	907	7
MLDYEING	18.0	18.0	14.3	796	2
PRIMEINSUR	51.9	50.1	11.2	223	5
DAFODILCOM	166.7	165.0	9.7	58	5
SHARPIND	35.4	35.2	7.8	220	3
MALEKSPIN	48.6	43.0	6.6	148	4
SAMORITA	95.0	95.0	4.9	52	1
SAPORTL	56.1	54.0	4.7	85	2
IFIC	5.3	5.3	3.8	726	2
GLDNJMF	8.1	8.0	3.6	450	2
BSC	127.5	127.5	2.6	20	1
UNITEDFIN	19.9	19.9	2.2	111	1
MEGHNA PET	92.5	92.5	2.2	24	1
SQURPHARMA	219.2	219.2	2.2	10	1
ACIFORMULA	154.9	154.9	1.5	10	2
ALLTEX	18.5	18.5	1.5	80	2
KARNAPHULI	54.9	50.1	1.3	25	2
BATBC	253.0	253.0	1.3	5	1
Total			324.0		94

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PREMIERLEA		0.0%	0.0%	Record Date	23-Aug-26
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26

Important DSE News

PREMIERLEA

The Board of Directors has recommended No Dividend for the year ended December 31, 2025. Date of AGM: 17.09.2026, Time: 11:00 AM, Venue: New Sindurpur Hall (4th Floor), FARS Hotel & Resorts, 212, Shahid Syed Nazrul Islam Sharani, Purana Paltan, Dhaka-1000. The AGM will be held through Hybrid System in combination of Physical presence of Shareholders at the Venue and presence or connection of Shareholders through Digital Platform. Record Date: 23.08.2026. The Company has also reported Consolidated EPS of Tk. (21.98), Consolidated NAV per share of Tk. (96.38) and Consolidated NOCFPS of Tk. 14.97 for the year ended December 31, 2025 as against Tk. (27.50), Tk. (74.36) and Tk. 22.92 respectively for the year ended December 31, 2024.

(Q1 Un-audited): Consolidated EPS was Tk. (1.80) for January-March 2026 as against Tk. (1.77) for January-March 2025. Consolidated NOCFPS was Tk. 0.02 for January-March 2026 as against Tk. 0.85 for January-March 2025. Consolidated NAV per share was Tk. (98.08) as on March 31, 2026 and Tk. (76.05) as on March 31, 2025.

(Q2 Un-audited): Consolidated EPS was Tk. (1.85) for April-June 2026 as against Tk. (2.44) for April-June 2025; Consolidated EPS was Tk. (3.65) for January-June 2026 as against Tk. (4.20) for January-June 2025. Consolidated NOCFPS was Tk. (0.21) for January-June 2026 as against Tk. 2.01 for January-June 2025. Consolidated NAV per share was Tk. (99.97) as on June 30, 2026 and Tk. (78.53) as on June 30, 2025.

DHAKABANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.38 for April-June 2026 as against Tk. 0.29 (restated) for April-June 2025; Consolidated EPS was Tk. 0.95 for January-June 2026 as against Tk. 1.09 (restated) for January-June 2025. Consolidated NOCFPS was Tk. (10.43) for January-June 2026 as against Tk. 23.09 (restated) for January-June 2025. Consolidated NAV per share was Tk. 23.46 as on June 30, 2026 and Tk. 22.54 (restated) as on June 30, 2025.

ALARABANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.72 for April-June 2026 as against Tk. 0.78 for April-June 2025; Consolidated EPS was Tk. 0.86 for January-June 2026 as against Tk. 0.83 for January-June 2025. Consolidated NOCFPS was Tk. 7.63 for January-June 2026 as against Tk. 15.89 for January-June 2025. Consolidated NAV per share was Tk. 21.81 as on June 30, 2026 and Tk. 21.16 as on December 31, 2025.

DHAKAINS

(Q2 Un-audited): EPS was Tk. 0.67 for April-June 2026 as against Tk. 0.73 for April-June 2025; EPS was Tk. 1.20 for January-June 2026 as against Tk. 1.23 for January-June 2025. NOCFPS was Tk. (0.20) for January-June 2026 as against Tk. (0.54) for January-June 2025. NAV per share (with revaluation) was Tk. 37.87 as on June 30, 2026 and Tk. 36.70 as on December 31, 2025. NAV per share (without revaluation) was Tk. 27.23 as on June 30, 2026 and Tk. 26.06 as on December 31, 2025.

MERCINS

(Q2 Un-audited): EPS was Tk. 0.10 for April-June 2026 as against Tk. 0.11 for April-June 2025; EPS was Tk. 0.44 for January-June 2026 as against Tk. 0.53 for January-June 2025. NOCFPS was Tk. 0.11 for January-June 2026 as against Tk. 0.12 for January-June 2025. NAV per share was Tk. 22.21 as on June 30, 2026 and Tk. 21.70 as on December 31, 2025.

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