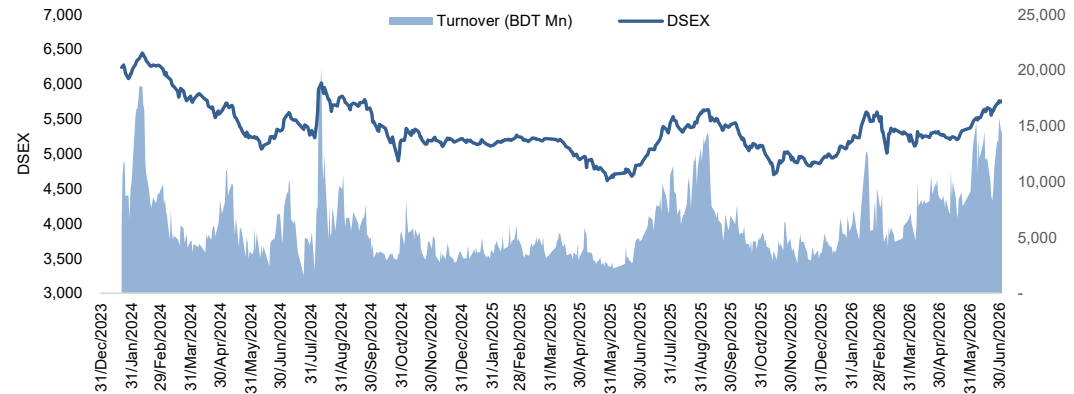


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.17%) lost 10.09 points and closed at 5,885.69. The blue-chip index DS30 (-0.41%), the Shariah-based index DSES (-0.51%), and the large-cap index CDSET (-0.39%) closed at 2,204.17, 1,186.48, and 1,153.59 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.85% followed by Telecommunication (-0.36%), Pharmaceutical (-0.26%), NBF1 (-0.22%), Engineering (-0.12%), Fuel & Power (-0.02%), and Bank (+0.01%), respectively. Block trades contributed 4.4% of the overall market turnover. Sharp Industries PLC (+6.5%) was the most traded share with a turnover of BDT 403 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,885.69	5,895.78	-10.09	-0.17%	+21.0%
DS30	2,204.17	2,213.34	-9.16	-0.41%	+18.9%
DSES	1,186.48	1,192.61	-6.14	-0.51%	+18.6%
CDSET	1,153.59	1,158.16	-4.57	-0.39%	+14.8%

	Advanced	Declined	Unchanged	Total
All Category	165	169	59	393
A Category (Equity)	84	92	21	197
B Category (Equity)	28	37	9	74
N Category (Equity)	0	1	0	1
Z Category (Equity)	53	39	29	121
Mutual Funds	22	5	7	34
Corporate Bonds	1	3	0	4
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,080,036	7,061,148	+0.3%
	Mn USD	57,199	57,046	
Turnover	Mn BDT	12,105	12,576	-3.7%
	Mn USD	98	102	
Volume	Mn Shares	488	514	-5.0%
No. of Trade		275,288	291,079	-5.4%

* Average Interbank Exchange Rate is BDT 123.78 as of Aug 03, 2026

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Figure: Sectorial Turnover (BDT Mn)

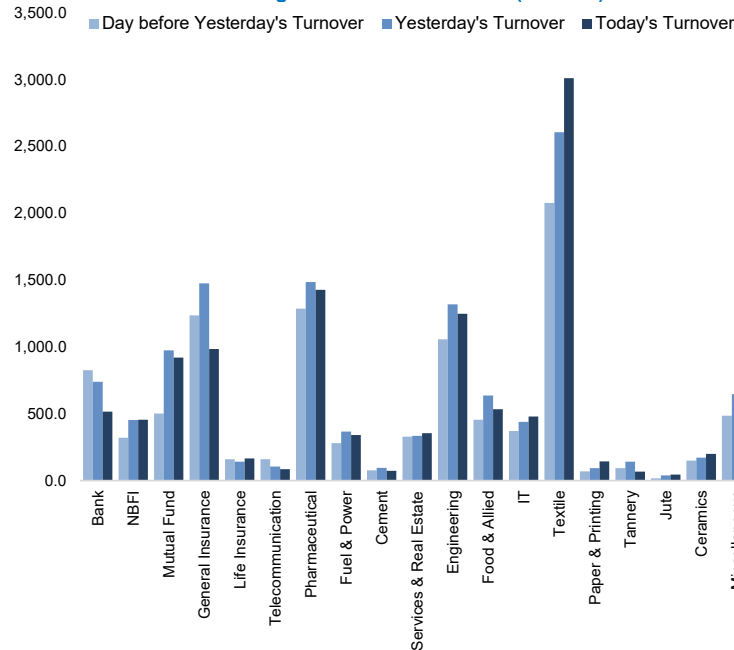
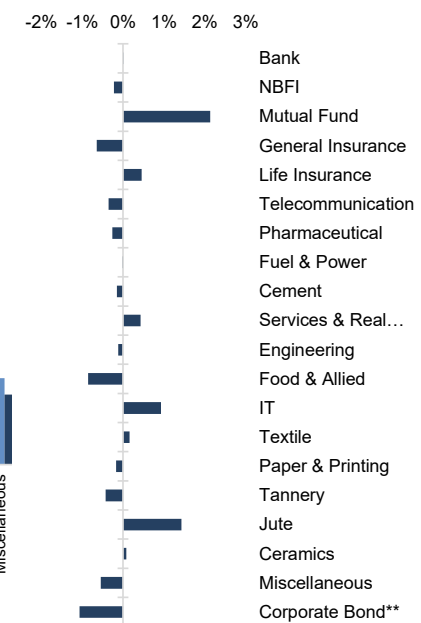


Figure: Sectorial Mcap Change



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	1,578	+0.20	+0.01%	36	752,106	10.6%	515.3	4.5%	7.4x	0.8x	GP	349,323	9.4%	27.0	9.9x	6.2x
NBFI	1,210	1,212	-2.66	-0.22%	23	115,030	1.6%	455.2	3.9%	NM	1.2x	SQURPHARMA	195,108	5.3%	67.2	7.5x	1.3x
Mutual Fund	746	730	+15.58	+2.13%	34	34,708	0.5%	919.8	7.9%	NM	0.6x	ROBI	166,566	4.5%	49.6	15.9x	2.5x
General Insurance	4,421	4,450	-28.55	-0.64%	43	124,909	1.8%	984.4	8.5%	18.5x	1.7x	BRACBANK	146,532	4.0%	72.1	6.5x	1.3x
Life Insurance	1,900	1,892	+8.59	+0.45%	15	53,564	0.8%	166.0	1.4%	NM	NM	BATBC	133,758	3.6%	63.7	23.0x	2.3x
Telecommunication	4,698	4,715	-16.80	-0.36%	3	545,123	7.7%	85.8	0.7%	11.3x	3.9x	WALTONHIL	131,089	3.5%	3.9	13.0x	1.1x
Pharmaceutical	3,208	3,216	-8.32	-0.26%	34	605,485	8.6%	1,427.2	12.3%	11.0x	1.5x	MARICO	85,790	2.3%	11.8	7.6x	18.6x
Fuel & Power	1,181	1,181	-0.22	-0.02%	23	311,802	4.4%	340.1	2.9%	10.0x	0.6x	BERGERPBL	73,708	2.0%	68.5	15.8x	3.4x
Cement	2,182	2,185	-3.28	-0.15%	7	102,669	1.5%	72.6	0.6%	23.8x	2.3x	UPGDCL	72,578	2.0%	6.8	7.8x	1.5x
Services & Real Estate	1,225	1,220	+5.26	+0.43%	9	66,679	0.9%	355.0	3.1%	27.1x	0.5x	LHB	67,476	1.8%	46.8	13.7x	3.6x
Engineering	2,813	2,816	-3.27	-0.12%	42	315,274	4.5%	1,248.3	10.8%	17.8x	0.9x	PUBALIBANK	60,907	1.6%	27.1	5.1x	0.8x
Food & Allied	13,386	13,501	-114.85	-0.85%	21	244,376	3.5%	534.0	4.6%	35.8x	3.6x	CITYBANK	55,106	1.5%	80.6	3.6x	0.8x
IT	2,714	2,689	+25.04	+0.93%	11	35,939	0.5%	479.6	4.1%	46.7x	2.2x	RENATA	53,965	1.5%	11.4	19.8x	1.5x
Textile	1,509	1,506	+2.44	+0.16%	58	156,940	2.2%	3,008.7	26.0%	NM	1.1x	DUTCHBANGL	49,838	1.3%	24.3	3.8x	0.8x
Paper & Printing	4,894	4,902	-8.23	-0.17%	6	22,924	0.3%	144.0	1.2%	NM	1.5x	ISLAMIBANK	49,105	1.3%	5.1	NM	0.8x
Tannery	2,234	2,243	-9.50	-0.42%	6	25,939	0.4%	67.4	0.6%	NM	1.6x	EBL	39,777	1.1%	31.8	4.4x	0.8x
Jute	13,805	13,610	+195.01	+1.43%	3	3,011	0.0%	44.9	0.4%	NM	1.9x	ICB	39,720	1.1%	3.1	NM	1.5x
Ceramics	512	512	+0.43	+0.08%	5	23,135	0.3%	199.3	1.7%	NM	1.5x	UNILEVERCL	39,389	1.1%	0.8	64.3x	24.2x
Miscellaneous	2,599	2,613	-14.14	-0.54%	15	141,142	2.0%	524.4	4.5%	40.3x	1.1x	POWERGRID	37,375	1.0%	5.9	9.2x	0.3x
Corporate Bond**	18,292	18,489	-196.98	-1.07%	16	40,470	0.6%	1.7	0.0%	NM	NM	BSRMSTEEL	37,144	1.0%	56.3	6.1x	1.0x
Treasury Bond**	2,184	2,167	+16.54	+0.76%	232	3,354,024	47.4%	1.2	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
FAREASTFIN	2.2	+10.0%	1.8	NM	NM	SQURPHARMA	108,968	7.0%	7.5x	1.3x	SHARPIND	39.5	+6.5%	403.2	NM	5.0x
ILFSL	2.3	+9.5%	10.5	NM	NM	BRACBANK	78,878	5.0%	6.5x	1.3x	FEKDIL	26.2	+0.4%	360.7	NM	1.4x
PLFSL	2.3	+9.5%	10.1	NM	NM	ISLAMIBANK	49,016	3.1%	NM	0.8x	MONNOFABR	24.7	+6.0%	320.2	NM	1.0x
CAPMBDBLMF	11.9	+9.2%	107.6	NM	1.1x	BXPHARMA	45,446	2.9%	7.5x	1.1x	ACIFORMULA	178.1	-0.4%	280.4	23.9x	2.2x
ICBSONALI1	7.5	+8.7%	90.1	NM	0.6x	WALTONHIL	43,141	2.8%	13.0x	1.1x	SAPORTL	58.0	+0.9%	258.3	27.4x	1.6x
FASFIN	2.8	+7.69%	1.3	NM	NM	PUBALIBANK	41,496	2.7%	5.1x	0.8x	QUEENSOUTH	19.2	-1.0%	227.5	NM	1.2x
GLDNJMF	10.1	+7.4%	49.4	NM	1x	CITYBANK	38,370	2.5%	3.6x	0.8x	DOMINAGE	83.1	-1.9%	225.5	NM	4.9x
TUNGHAI	3.0	+7.1%	2.3	NM	NM	BATBC	35,379	2.3%	23.0x	2.3x	IPDC	32.3	-2.4%	204.6	27.1x	1.9x
GSPFINANCE	4.5	+7.1%	5.2	NM	NM	GP	34,932	2.2%	9.9x	6.2x	SAIHAMTEX	25.9	+0.8%	203.6	41.8x	0.6x
PREMIERLEA	3.0	+7.1%	4.6	NM	NM	EBL	27,271	1.7%	4.4x	0.8x	MALEKSPIN	46.2	-1.5%	198.1	8.1x	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	26,286	1.7%	19.8x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
METROSPIN	9.3	-4.1%	1.5	NM	2.3x	LHB	24,703	1.6%	13.7x	3.6x	IPDC	35.9	31.0	4.0	4,627	147.80
SBACBANK	7.2	-4.0%	2.5	5.1x	1x	PRIMEBANK	22,990	1.5%	4.0x	0.8x	SUNLIFEINS	73.0	73.0	2.0	947	69.10
BEXIMCO	22.3	-3.6%	64.9	27.4x	2.1x	OLYMPIC	19,193	1.2%	16.2x	2.3x	SHARPIND	37.0	33.5	13.0	1,932	67.99
ASIATICLAB	119.0	-3.6%	64.9	27.4x	2.1x	UTTARABANK	17,862	1.1%	NM	0.8x	SONARGAON	109.0	102.0	5.0	254	26.53
BXPHARMA	145.8	-3.4%	164.7	7.5x	1.1x	ROBI	16,657	1.1%	15.9x	2.5x	MALEKSPIN	45.5	45.5	5.0	577	26.25
MEGCONMILK	34.5	-3.4%	7.6	NM	NM	BSRMLTD	16,310	1.0%	4.7x	0.6x	DOMINAGE	87.6	78.0	10.0	322	25.57
SHEPHERD	17.7	-3.3%	76.2	NM	1.5x	ALARABANK	15,643	1.0%	20.5x	0.7x	PUBALIBANK	39.3	39.3	1.0	600	23.58
UCB	9.6	-3.0%	15.3	3.9x	0.4x	BEACONPHAR	15,087	1.0%	17.2x	3.2x	MLDYING	19.6	17.8	5.0	1,064	19.97
ALARABANK	16.0	-3.0%	3.9	20.5x	0.7x	JAMUNABANK	14,266	0.9%	3.6x	0.8x	RELIANCINS	107.0	107.0	1.0	150	16.05
SICL	36.0	-3.0%	15.8	NM	2.4x						FINEFOODS	480.0	437.0	5.0	33	15.28

* 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	Important DSE News
IPDC	35.9	31.0	147.8	4,627	4	
SUNLIFEINS	73.0	73.0	69.1	947	2	
SHARPIND	37.0	33.5	68.0	1,932	13	
SONARGAON	109.0	102.0	26.5	254	5	
MALEKSPIN	45.5	45.5	26.3	577	5	
DOMINAGE	87.6	78.0	25.6	322	10	
PUBALIBANK	39.3	39.3	23.6	600	1	
MLDYEING	19.6	17.8	20.0	1,064	5	
RELIANCINS	107.0	107.0	16.1	150	1	
FINEFOODS	480.0	437.0	15.3	33	5	
BERGERPBL	1,498.0	1,498.0	15.0	10	1	
DULAMIACOT	202.0	200.0	8.2	41	5	
NAHEEACP	38.8	38.0	7.6	199	3	
ROBI	34.9	34.9	7.4	211	5	
DAFODILCOM	166.0	166.0	6.6	40	1	
SAIHAMTEX	24.7	24.6	6.2	250	3	
CITYGENINS	112.5	112.5	5.1	45	1	
ISLAMIINS	66.9	57.5	4.2	70	2	
SONALILIFE	84.1	84.1	4.0	48	1	
SHASHADNIM	29.0	29.0	2.9	101	1	
PRAGATIINS	87.0	87.0	2.3	27	1	
PRIMEINSUR	51.9	51.9	2.1	40	1	
Total			530.4		103	

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

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