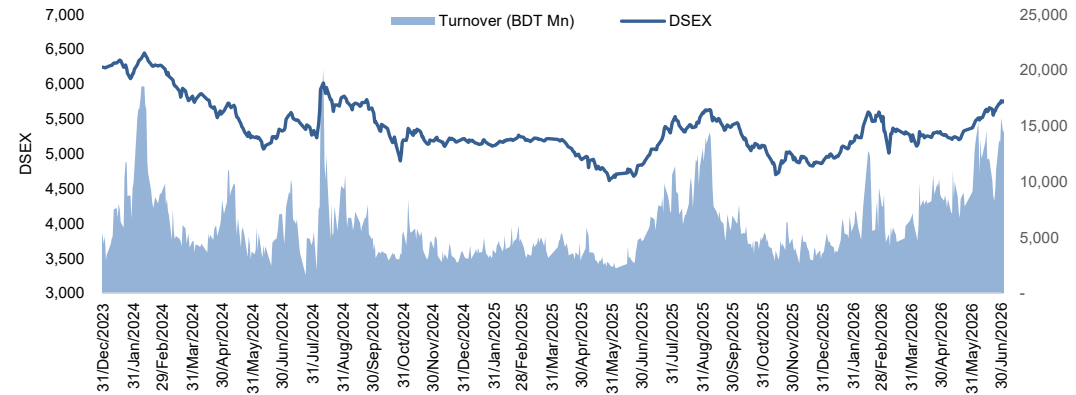


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.30%) gained 17.33 points and closed at 5,866.55. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (+0.36%), and the large-cap index CDSET (+0.35%) closed at 2,203.09, 1,196.80, and 1,157.99 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.08% followed by Bank (+0.52%), Engineering (+0.39%), Fuel & Power (+0.32%), Pharmaceutical (+0.20%), NBFi (-0.13%), and Telecommunication (-0.39%), respectively. Block trades contributed 3.7% of the overall market turnover. Malek Spinning Mills PLC. (+2.9%) was the most traded share with a turnover of BDT 532 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,866.55	5,849.22	+17.33	+0.30%	+20.6%
DS30	2,203.09	2,200.74	+2.35	+0.11%	+18.9%
DSES	1,196.80	1,192.48	+4.32	+0.36%	+19.6%
CDSET	1,157.99	1,153.90	+4.09	+0.35%	+15.2%

	Advanced	Declined	Unchanged	Total
All Category	181	165	48	394
A Category (Equity)	83	101	15	199
B Category (Equity)	34	31	9	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	64	33	24	121
Mutual Funds	8	20	6	34
Corporate Bonds	1	0	1	2
Treasury Bonds	0	5	0	5

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,077,135	7,059,629	+0.2%
	Mn USD	57,409	57,267	
Turnover	Mn BDT	14,192	16,696	-15.0%
	Mn USD	115	135	
Volume	Mn Shares	437	527	-17.0%
No. of Trade		328,447	382,533	-14.1%

* Average Interbank Exchange Rate is BDT 123.28 as of Jul 13, 2026

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Tasviha Taher Trishila Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

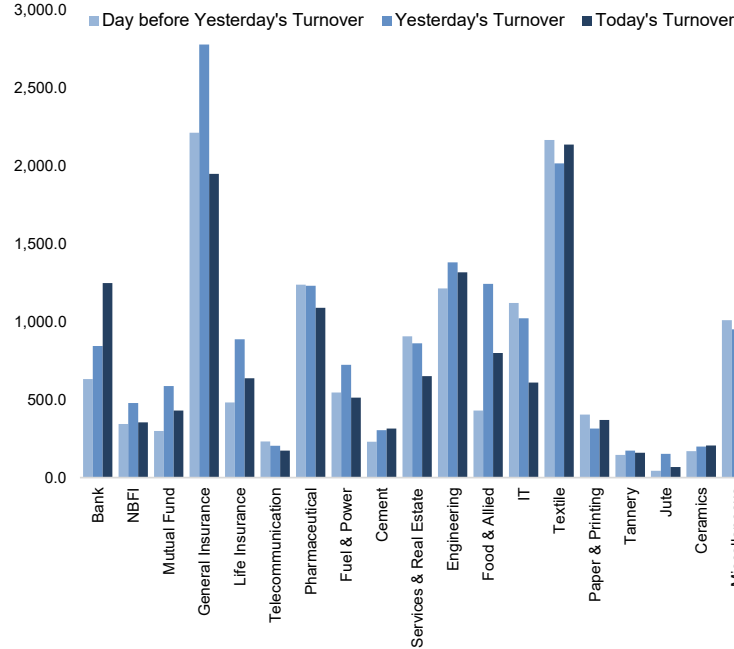
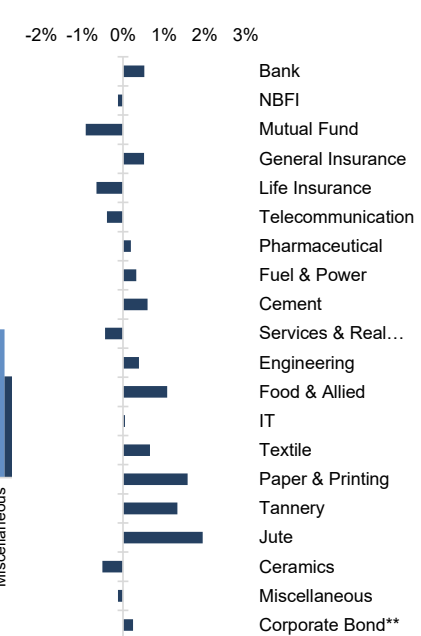


Figure: Sectorial Mcap Change



Market PE 14.1x

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	1,562	1,554	+8.11	+0.52%	36	744,386	10.5%	1,246.0	9.1%	7.0x	0.7x	GP	348,647	9.4%	49.5	11.7x	5.6x
NBFI	1,181	1,182	-1.49	-0.13%	23	112,274	1.6%	354.8	2.6%	NM	1.2x	SQURPHARMA	196,260	5.3%	91.5	7.6x	1.3x
Mutual Fund	620	626	-5.71	-0.91%	36	29,861	0.4%	429.4	3.1%	NM	0.5x	ROBI	169,709	4.6%	97.1	16.3x	2.4x
General Insurance	4,520	4,497	+23.08	+0.51%	43	127,711	1.8%	1,946.2	14.2%	20.5x	1.8x	BRACBANK	145,845	3.9%	302.4	7.3x	1.3x
Life Insurance	2,053	2,067	-13.47	-0.65%	15	57,881	0.8%	636.4	4.7%	NM	NM	WALTONHIL	136,587	3.7%	20.7	13.6x	1.1x
Telecommunication	4,730	4,748	-18.69	-0.39%	3	548,806	7.8%	173.1	1.3%	12.8x	3.6x	BATBC	120,960	3.3%	68.9	25.5x	2.2x
Pharmaceutical	3,234	3,228	+6.30	+0.20%	34	610,556	8.6%	1,088.2	8.0%	11.1x	1.5x	MARICO	86,071	2.3%	14.9	7.5x	29.7x
Fuel & Power	1,201	1,198	+3.88	+0.32%	23	317,145	4.5%	512.9	3.8%	10.2x	0.6x	UPGDCL	75,766	2.1%	16.0	8.2x	1.6x
Cement	2,190	2,177	+13.13	+0.60%	7	103,045	1.5%	315.0	2.3%	23.9x	2.2x	BERGERPBL	68,748	1.9%	10.3	18.5x	3.5x
Services & Real Estate	1,227	1,232	-5.37	-0.44%	9	66,758	0.9%	650.7	4.8%	27.2x	0.5x	BXPBARMA	68,344	1.8%	157.6	7.9x	1.1x
Engineering	2,847	2,836	+11.11	+0.39%	42	319,135	4.5%	1,315.6	9.6%	18.5x	0.9x	PUBALIBANK	58,408	1.6%	17.0	5.2x	0.8x
Food & Allied	12,850	12,713	+137.76	+1.08%	21	234,593	3.3%	798.5	5.8%	39.6x	3.5x	CITYBANK	54,407	1.5%	131.2	3.7x	0.8x
IT	2,677	2,675	+1.36	+0.05%	11	35,446	0.5%	609.1	4.5%	46.1x	2.2x	RENATA	53,254	1.4%	16.5	19.5x	1.5x
Textile	1,415	1,406	+9.33	+0.66%	58	147,225	2.1%	2,134.3	15.6%	NM	1.0x	ISLAMIBANK	51,842	1.4%	6.1	NM	0.8x
Paper & Printing	5,102	5,022	+79.44	+1.58%	6	23,896	0.3%	369.4	2.7%	NM	1.6x	DUTCHBANGL	47,605	1.3%	31.4	4.2x	0.8x
Tannery	2,188	2,159	+28.73	+1.33%	6	25,404	0.4%	159.5	1.2%	NM	1.6x	ICB	40,935	1.1%	17.6	NM	1.5x
Jute	14,126	13,855	+270.47	+1.95%	3	3,081	0.0%	67.7	0.5%	NM	1.9x	EBL	40,270	1.1%	83.0	4.7x	0.7x
Ceramics	504	507	-2.54	-0.50%	5	22,792	0.3%	205.1	1.5%	NM	1.5x	UNILEVERCL	39,850	1.1%	0.7	51.3x	16.9x
Miscellaneous	2,586	2,590	-3.15	-0.12%	15	140,446	2.0%	647.9	4.7%	55.4x	1.1x	POWERGRID	37,832	1.0%	18.0	9.3x	0.3x
Corporate Bond**	18,899	18,853	+46.10	+0.24%	16	41,813	0.6%	2.2	0.0%	NM	NM	PRIMEBANK	36,559	1.0%	80.5	4.0x	0.8x
Treasury Bond**	2,193	2,188	+5.32	+0.24%	232	3,369,073	47.6%	9.7	0.1%	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
DSHGARME	164.1	+10.0%	54.5	NM	1.0x	SQURPHARMA	109,611	7.0%	7.6x	1.3x	MALEKSPIN	45.5	+2.9%	531.9	8.0x	0.7x
USMANIAGL	74.2	+9.9%	9.1	NM	1.2x	BRACBANK	78,509	5.0%	7.3x	1.3x	BRACBANK	63.7	+0.6%	302.4	7.3x	1.3x
EMERALDOIL	28.9	+9.9%	18.4	NM	NM	ISLAMIBANK	51,748	3.3%	NM	0.8x	EHL	99.3	-3.6%	262.7	11.1x	1.1x
ILFSL	1.2	+9.1%	2.8	NM	NM	BXPBARMA	47,752	3.1%	7.9x	1.1x	LOVELLO	75.7	-0.9%	255.3	24.8x	5.6x
SAMATALETH	102.6	+8.9%	21.7	NM	7.1x	WALTONHIL	44,951	2.9%	13.6x	1.1x	SHARPIND	29.2	+7.4%	255.2	NM	3.7x
SHYAMPSUG	320.0	+8.73%	17.6	NM	NM	PUBALIBANK	39,794	2.6%	5.2x	0.8x	FEKDIL	24.2	+1.7%	218.0	NM	1.3x
JUTESPINN	227.1	+8.7%	3.1	NM	NM	CITYBANK	37,883	2.4%	3.7x	0.8x	MEGHNAINS	44.8	+8.0%	216.6	31.1x	3.0x
ICBAGRANI1	8.9	+8.5%	19.1	NM	0.7x	GP	34,865	2.2%	11.7x	5.6x	BSC	123.6	-0.5%	200.6	6.6x	1.1x
FASFIN	1.3	+8.3%	1.4	NM	NM	BATBC	31,994	2.1%	25.5x	2.2x	LHB	57.4	+1.6%	198.2	13.8x	3.3x
MEGHNAINS	44.8	+8.0%	216.6	31.1x	3.0x	EBL	27,609	1.8%	4.7x	0.7x	RDFOOD	30.5	+3.0%	172.1	NM	1.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	25,940	1.7%	19.5x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FAREASTFIN	1.1	-8.3%	0.8	NM	NM	LHB	24,405	1.6%	13.8x	3.3x	MEGHNAINS	41.0	37.5	10.0	2,285	91.42
TUNGHAI	2.5	-7.4%	1.5	NM	NM	PRIMEBANK	22,838	1.5%	4.0x	0.8x	BRACBANK	63.6	63.3	3.0	818	51.96
ABB1STMF	3.6	-4.7%	3.9	NM	0.5x	OLYMPIC	20,157	1.3%	17.0x	2.4x	DHAKABANK	12.1	12.1	1.0	4,120	49.85
GREENDELMF	4.1	-4.7%	3.9	NM	0.5x	UTTARABANK	18,031	1.2%	NM	0.8x	MARICO	2,720.0	2,700.0	5.0	17	45.22
FAMILYTEX	2.2	-4.3%	4.1	NM	0.2x	BEXIMCO	17,098	1.1%	NM	0.3x	CITYGENINS	107.3	97.0	4.0	348	36.95
SUNLIFEINS	75.7	-4.3%	85.0	NM	NM	ROBI	16,971	1.1%	16.3x	2.4x	EBL	24.5	24.5	1.0	1,000	24.50
EHL	99.3	-3.6%	262.7	11.1x	1.1x	BSRMLTD	16,879	1.1%	4.9x	0.6x	BXPBARMA	136.5	136.5	1.0	132	18.03
AIBL1STMF	5.6	-3.4%	26.6	NM	0.6x	BEACONPHAR	15,907	1.0%	18.2x	3.4x	BATBC	222.0	222.0	2.0	78	17.40
SHURWID	5.9	-3.3%	2.7	NM	0.5x	ALARABANK	15,643	1.0%	19.0x	0.8x	ISLAMIINS	63.2	63.2	1.0	236	14.94
GRAMEENS2	13.0	-3.0%	12.2	NM	1.2x	** Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022					DOMINAGE	75.0	74.0	7.0	184	13.72

* 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
MEGHNAIS	41.0	37.5	91.4	2,285	10
BRACBANK	63.6	63.3	52.0	818	3
DHAKABANK	12.1	12.1	49.9	4,120	1
MARICO	2,720.0	2,700.0	45.2	17	5
CITYGENINS	107.3	97.0	37.0	348	4
EBL	24.5	24.5	24.5	1,000	1
BXPHERMA	136.5	136.5	18.0	132	1
BATBC	222.0	222.0	17.4	78	2
ISLAMIINS	63.2	63.2	14.9	236	1
DOMINAGE	75.0	74.0	13.7	184	7
PUBALIBANK	33.4	33.4	13.0	390	1
MALEKSPIN	48.0	42.0	12.4	285	4
ASIATICLAB	155.0	139.0	11.9	80	4
FINEFOODS	465.0	465.0	11.3	24	2
NAHEEACP	39.0	38.0	10.7	280	4
ROBI	35.4	35.4	10.6	300	2
RENATA	423.4	423.4	10.1	24	1
COPPERTECH	28.0	28.0	9.5	340	1
APEXSPINN	390.0	390.0	5.9	15	1
FEKDIL	26.1	23.0	5.1	220	2
DSHGARME	156.0	155.0	4.8	31	3
GQBALLPEN	627.8	596.6	4.8	8	2
Total			519.6		101

Important DSE News
AAMRATECH

The Board of Directors has recommended 0.25% Cash Dividend excluding Sponsors and Directors for the year ended June 30, 2025. The Sponsors and Directors hold 19,418,373 shares of the company and Cash Dividend payable to the General Shareholders is Tk. 1,132,226.73. Date, Time, Venue of AGM and Record Date will be notified later subject to consent accorded from the honorable High Court. The Company has also reported EPS of Tk. (3.17), NAV per share of Tk. 18.46 and NOCFPS of Tk. 0.70 for the year ended June 30, 2025 as against Tk. (0.12), Tk. 21.73 and Tk. 4.21 respectively for the year ended June 30, 2024.

SONALILIFE

The Board of Directors has recommended 15% Cash Dividend for the year ended December 31, 2025. Date of AGM: August 27, 2026, at 10.00 A.M., Venue: (Hybrid System) Conference Room (5th Floor) SLICL, 68/B, DIT Road, Malibagh Chowdhury Para. Record Date: August 02, 2026. The Company has also reported EPS of Tk. 1.62, NAV per share of Tk. 32.15 and NOCFPS of Tk. 11.81 for the year ended December 31, 2025 as against Tk. 1.73, Tk. 39.64 and Tk. 17.37 respectively for the year ended December 31, 2024.

BGIC

(Q2 Un-audited): EPS was Tk. 0.55 for April-June 2026 as against Tk. 0.56 for April-June 2025; EPS was Tk. 1.24 for January-June 2026 as against Tk. 1.23 for January-June 2025. NOCFPS was Tk. 0.52 for January-June 2026 as against Tk. 0.66 for January-June 2025. NAV per share was Tk. 22.05 as on June 30, 2026 and Tk. 20.16 as on June 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PLFSL		0.0%	0.0%	Record Date	26-Jul-26
ICBIBANK		0.0%	0.0%	Record Date	28-Jul-26
BIFC		0.0%	0.0%	Record Date	30-Jul-26
FASFIN		0.0%	0.0%	Record Date	30-Jul-26
BXPHERMA		0.0%	47.5%	Record Date	2-Aug-26
SONALILIFE		0.0%	15.0%	Record Date	2-Aug-26

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.