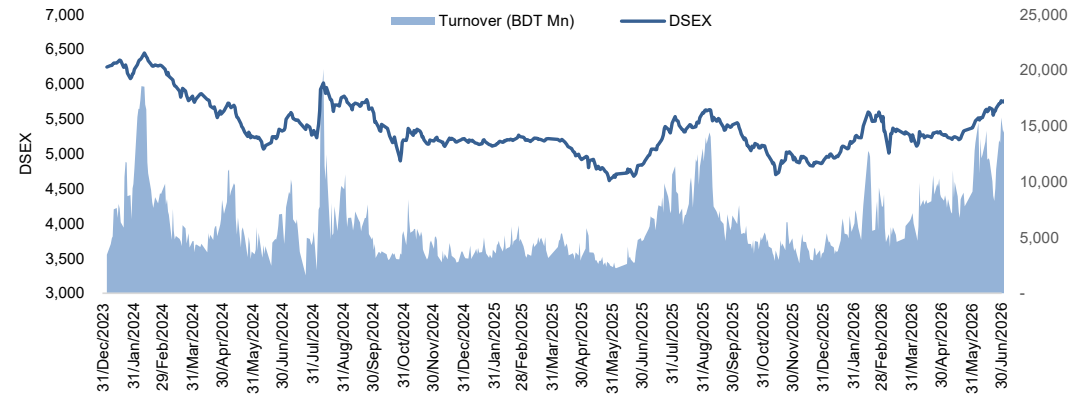


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 1.9 points and closed at 5,857.62. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (+0.04%) closed at 2,208.84, 1,197.20, and 1,161.26 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.60%, followed by NBFi (+0.45%), Telecommunication (+0.32%), Food & Allied (+0.19%), Engineering (-0.05%), Fuel & Power (-0.19%), and Pharmaceutical (-0.31%), respectively. Block trades contributed 1.9% of the overall market turnover. Malek Spinning Mills PLC. (+1.3%) was the most traded share with a turnover of BDT 472 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,857.62	5,855.72	+1.90	+0.03%	+20.4%
DS30	2,208.84	2,210.75	-1.91	-0.09%	+19.2%
DSES	1,197.20	1,197.81	-0.60	-0.05%	+19.6%
CDSET	1,161.26	1,160.78	+0.48	+0.04%	+15.6%

	Advanced	Declined	Unchanged	Total
All Category	148	182	58	388
A Category (Equity)	72	103	18	193
B Category (Equity)	28	39	7	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	48	40	33	121
Mutual Funds	21	6	7	34
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,068,250	7,082,583	-0.2%
	Mn USD	57,202	57,318	
Turnover	Mn BDT	9,665	10,704	-9.7%
	Mn USD	78	87	
Volume	Mn Shares	333	354	-5.9%
No. of Trade		254,077	277,180	-8.3%

* Average Interbank Exchange Rate is BDT 123.57 as of Jul 20, 2026

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Figure: Sectorial Turnover (BDT Mn)

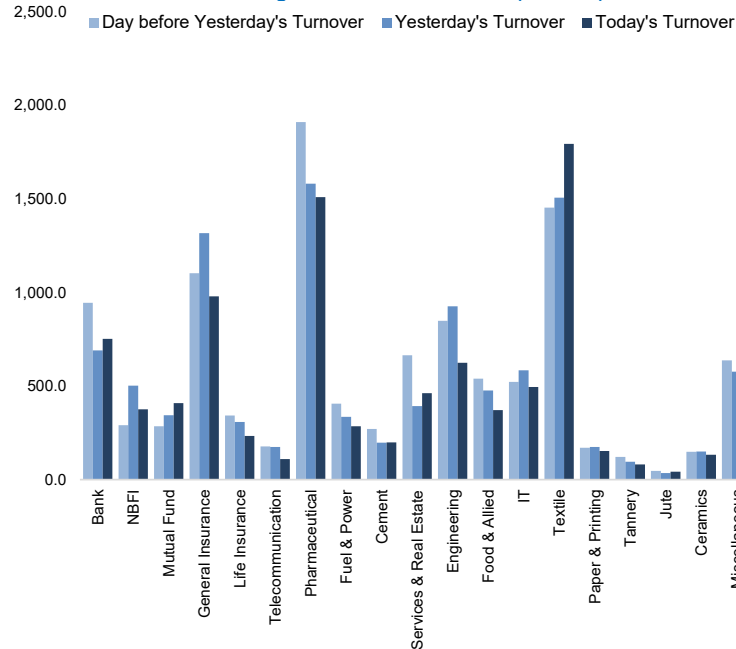
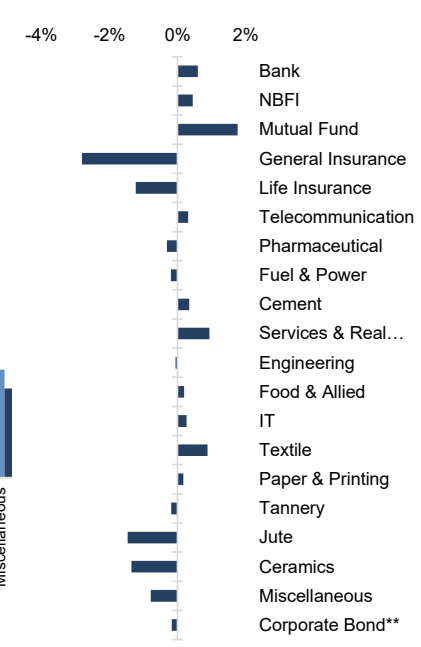


Figure: Sectorial Mcap Change



Market PE 13.7x

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	1,587	1,578	+9.40	+0.60%	36	756,377	10.7%	752.2	7.9%	7.1x	0.8x	GP	347,027	9.4%	21.8	9.8x	6.2x
NBFI	1,190	1,185	+5.29	+0.45%	23	113,204	1.6%	374.9	4.0%	NM	1.2x	SQURPHARMA	196,703	5.3%	62.8	7.6x	1.3x
Mutual Fund	640	629	+11.13	+1.77%	36	30,828	0.4%	408.1	4.3%	NM	0.6x	ROBI	171,804	4.7%	52.3	16.5x	2.4x
General Insurance	4,155	4,275	-119.93	-2.81%	43	117,391	1.7%	978.6	10.3%	18.8x	1.6x	BRACBANK	146,761	4.0%	90.1	7.4x	1.3x
Life Insurance	1,925	1,949	-23.97	-1.23%	15	54,273	0.8%	233.6	2.5%	NM	NM	WALTONHIL	132,689	3.6%	10.8	13.2x	1.1x
Telecommunication	4,732	4,717	+14.92	+0.32%	3	549,057	7.8%	110.3	1.2%	11.4x	3.7x	BATBC	119,610	3.2%	21.0	25.2x	2.1x
Pharmaceutical	3,248	3,258	-10.11	-0.31%	34	613,112	8.7%	1,508.5	15.9%	11.1x	1.6x	MARICO	86,575	2.3%	6.3	7.5x	29.9x
Fuel & Power	1,182	1,184	-2.27	-0.19%	23	311,897	4.4%	284.8	3.0%	10.0x	0.6x	UPGDCL	73,563	2.0%	9.9	7.9x	1.5x
Cement	2,277	2,269	+7.90	+0.35%	7	107,123	1.5%	199.2	2.1%	24.8x	2.3x	LHB	70,612	1.9%	138.0	14.6x	3.5x
Services & Real Estate	1,230	1,219	+11.48	+0.94%	9	66,955	0.9%	461.8	4.9%	27.3x	0.5x	BERGERPBL	68,586	1.9%	11.8	18.4x	3.5x
Engineering	2,811	2,813	-1.52	-0.05%	42	315,126	4.5%	623.7	6.6%	18.2x	0.9x	PUBALIBANK	58,252	1.6%	17.2	5.2x	0.8x
Food & Allied	12,711	12,687	+24.43	+0.19%	21	232,051	3.3%	370.7	3.9%	39.1x	3.5x	CITYBANK	55,106	1.5%	109.0	3.7x	0.8x
IT	2,677	2,670	+7.04	+0.26%	11	35,447	0.5%	495.2	5.2%	46.1x	2.2x	RENATA	53,976	1.5%	36.2	19.8x	1.5x
Textile	1,430	1,418	+12.55	+0.89%	58	148,750	2.1%	1,793.0	18.9%	NM	1.0x	ISLAMIBANK	52,325	1.4%	2.7	NM	0.8x
Paper & Printing	4,985	4,976	+8.70	+0.17%	6	23,347	0.3%	152.9	1.6%	NM	1.5x	DUTCHBANGL	50,041	1.4%	69.8	4.4x	0.8x
Tannery	2,200	2,204	-4.01	-0.18%	6	25,549	0.4%	81.1	0.9%	NM	1.6x	ICB	41,021	1.1%	6.5	NM	1.5x
Jute	13,508	13,709	-200.88	-1.47%	3	2,946	0.0%	41.6	0.4%	NM	1.8x	EBL	40,106	1.1%	52.9	4.7x	0.7x
Ceramics	514	521	-7.05	-1.35%	5	23,220	0.3%	133.3	1.4%	NM	1.5x	UNILEVERCL	39,830	1.1%	0.4	51.2x	16.9x
Miscellaneous	2,575	2,595	-20.30	-0.78%	15	139,800	2.0%	475.2	5.0%	54.7x	1.1x	PRIMEBANK	37,655	1.0%	49.8	4.2x	0.8x
Corporate Bond**	18,818	18,850	-32.09	-0.17%	16	41,632	0.6%	1.0	0.0%	NM	NM	POWERGRID	37,009	1.0%	5.0	9.1x	0.3x
Treasury Bond**	2,190	2,201	-10.51	-0.48%	232	3,364,239	47.6%	0.6	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
LRGLOBMF1	4.4	+10.0%	16.4	NM	0.5x	SQURPHARMA	109,859	7.0%	7.6x	1.3x	MALEKSPIN	45.2	+1.3%	471.6	8.0x	0.7x
MBL1STMF	5.5	+10.0%	16.8	NM	0.6x	BRACBANK	79,002	5.1%	7.4x	1.3x	TECHNODRUG	50.0	+3.1%	357.0	33.3x	1.6x
SONARGAON	90.8	+9.9%	40.2	NM	5.0x	ISLAMIBANK	52,231	3.4%	NM	0.8x	SAPORTL	53.5	+4.1%	247.7	25.2x	1.5x
NCCBLMF1	6.7	+9.8%	9.1	NM	0.7x	BXPHARMA	46,942	3.0%	7.8x	1.1x	ACIFORMULA	188.4	+4.7%	234.0	25.3x	2.3x
MLDYEING	15.1	+9.4%	150.1	NM	1.2x	WALTONHIL	43,668	2.8%	13.2x	1.1x	FEKDIL	25.8	+1.2%	231.0	NM	1.3x
GREENDELMF	4.8	+9.09%	28.6	NM	0.5x	PUBALIBANK	39,687	2.5%	5.2x	0.8x	BSC	122.4	-1.8%	205.2	6.5x	1.1x
ZEALBANGLA	225.9	+8.3%	8.9	NM	NM	CITYBANK	38,370	2.5%	3.7x	0.8x	GENEXIL	42.7	+4.1%	180.5	19.5x	1.8x
FAREASTFIN	1.4	+7.7%	0.6	NM	NM	GP	34,703	2.2%	9.8x	6.2x	IPDC	33.1	+1.8%	163.3	29.3x	1.9x
ILFSL	1.4	+7.7%	3.5	NM	NM	BATBC	31,637	2.0%	25.2x	2.1x	MLDYEING	15.1	+9.4%	150.1	NM	1.2x
UCB	9.9	+7.6%	29.4	4.5x	0.4x	EBL	27,497	1.8%	4.7x	0.7x	LHB	60.8	+1.0%	138.0	14.6x	3.5x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	RENATA	26,292	1.7%	19.8x	1.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PROVATIINS	57.4	-5.7%	36.3	31.2x	2.5x	LHB	25,851	1.7%	14.6x	3.5x	CITYBANK	28.8	28.4	3.0	1,350	38.55
KARNAPHULI	44.6	-5.1%	48.5	20.4x	2x	PRIMEBANK	23,523	1.5%	4.2x	0.8x	ORIONINFU	320.0	320.0	1.0	50	16.00
UNITEDINS	50.0	-4.7%	10.2	20.2x	2.1x	OLYMPIC	19,619	1.3%	16.5x	2.3x	BSRMSTEEL	102.0	99.8	2.0	140	14.17
STANDARINS	49.2	-4.7%	10.2	20.2x	2.1x	UTTARABANK	17,946	1.2%	NM	0.8x	SHARPIND	36.6	30.2	2.0	419	14.06
DHAKAINS	42.1	-4.5%	11.2	24.1x	1.1x	ROBI	17,180	1.1%	16.5x	2.4x	BNICL	121.5	115.7	3.0	105	12.36
AIBL1STMF	6.4	-4.5%	43.2	NM	0.7x	ALARABANK	17,011	1.1%	20.7x	0.8x	LOVELLO	76.0	73.2	2.0	162	12.28
MEGHNAINS	37.4	-4.3%	100.9	26.0x	2.5x	BSRMLTD	16,737	1.1%	4.9x	0.6x	TAKAFULINS	54.5	54.5	1.0	219	11.95
PURABIGEN	30.9	-4.3%	26.5	23.6x	2.1x	BEXIMCO	16,593	1.1%	NM	0.3x	DAFODILCOM	158.0	157.0	5.0	50	7.83
EIL	30.8	-4.0%	36.2	25.0x	1.5x	BEACONPHAR	15,295	1.0%	17.5x	3.3x	MEGHNAPE	86.0	86.0	5.0	77	6.66
CRYSTALINS	67.6	-4.0%	19.2	19.2x	2.4x						DBH	45.0	45.0	3.0	143	6.42

* 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
CITYBANK	28.8	28.4	38.6	1,350	3
ORIONINFU	320.0	320.0	16.0	50	1
BSRMSTEEL	102.0	99.8	14.2	140	2
SHARPIND	36.6	30.2	14.1	419	2
BNICL	121.5	115.7	12.4	105	3
LOVELLO	76.0	73.2	12.3	162	2
TAKAFULINS	54.5	54.5	11.9	219	1
DAFODILCOM	158.0	157.0	7.8	50	5
MEGHNA PET	86.0	86.0	6.7	77	5
DBH	45.0	45.0	6.4	143	3
MEGHNA INS	41.5	40.0	5.2	130	2
FEKDIL	25.2	25.2	5.0	198	1
STANDARINS	54.0	54.0	4.1	77	1
LHB	66.2	66.2	3.8	57	1
NITOLINS	38.4	38.4	3.3	87	2
PEOPLESINS	62.0	62.0	3.1	50	1
AAMRATECH	15.8	15.8	2.8	175	1
CAPMIBBLMF	15.2	15.2	2.3	150	1
SICL	41.9	41.9	2.0	48	1
PROVATIINS	66.8	66.8	1.9	29	1
TECHNODRUG	48.0	47.1	1.8	38	2
PREMIERBAN	5.0	5.0	1.6	317	1
Total			185.2		54

Important DSE News

SANDHANINS

The Board of Directors has recommended 12% cash dividend for the year ended December 31, 2025. Date of AGM: 29.09.2026, Time: 11:30 AM, Venue: Digital Platform. Record Date: 24.08.2026. The Company has also reported Consolidated EPS of Tk. 1.20, Consolidated NAV per share of Tk. 18.00 and Consolidated NOCFPS of Tk. 2.87 for the year ended December 31, 2025 as against Tk. 1.15, Tk. 18.31 and Tk. 0.29 respectively for the year ended December 31, 2024.

PRAGATIINS

(Q2 Un-audited): EPS was Tk. 1.52 for April - June 2026 as against Tk. 1.23 (restated) for April - June 2025; EPS was Tk. 3.11 for January - June 2026 as against Tk. 2.26 (restated) for January - June 2025; NOCFPS was Tk. 2.00 for January - June 2026 as against Tk. (0.58) (restated) for January - June 2025. NAV per share was Tk. 57.43 as on June 30, 2026 and Tk. 55.69 (restated) as on December 31, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BXPHARMA		0.0%	47.5%	Record Date	2-Aug-26
SONALILIFE		0.0%	15.0%	Record Date	2-Aug-26
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
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26

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