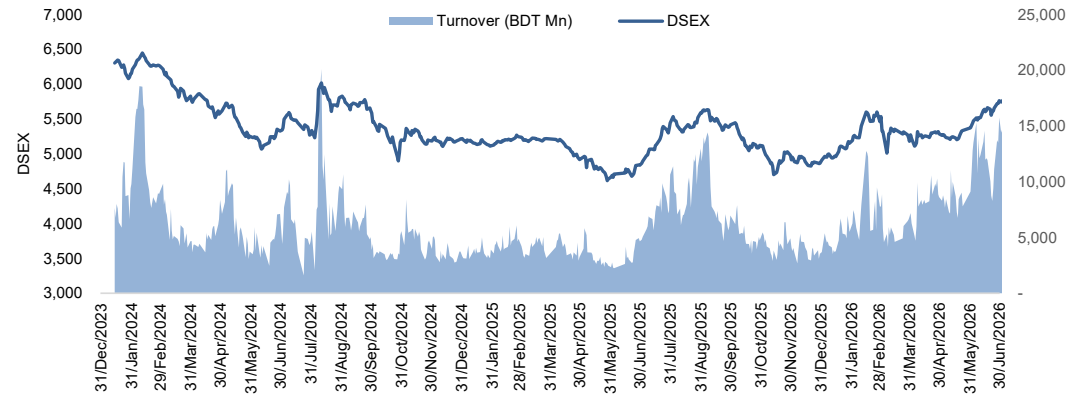


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.96%) gained 55.4 points and closed at 5,839.77. The blue-chip index DS30 (+0.70%), the Shariah-based index DSES (+0.96%), and the large-cap index CDSET (+0.74%) closed at 2,201.56, 1,188.58, and 1,154.97 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.86% followed by Engineering (+1.85%), NBFI (+1.45%), Bank (+1.04%), Fuel & Power (+0.92%), Telecommunication (+0.24%), and Pharmaceutical (+0.20%), respectively. Block trades contributed 4.1% of the overall market turnover. Far East Knitting & Dyeing Industries PLC. (+3.4%) was the most traded share with a turnover of BDT 318 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,839.77	5,784.37	+55.40	+0.96%	+20.0%
DS30	2,201.56	2,186.21	+15.35	+0.70%	+18.8%
DSES	1,188.58	1,177.30	+11.28	+0.96%	+18.8%
CDSET	1,154.97	1,146.46	+8.51	+0.74%	+14.9%

	Advanced	Declined	Unchanged	Total
All Category	299	53	39	391
A Category (Equity)	152	30	13	195
B Category (Equity)	61	9	4	74
N Category (Equity)	0	1	0	1
Z Category (Equity)	86	13	22	121
Mutual Funds	31	0	3	34
Corporate Bonds	2	1	1	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,021,197	6,988,907	+0.5%
	Mn USD	56,732	56,471	
Turnover	Mn BDT	8,721	7,806	+11.7%
	Mn USD	70	63	
Volume	Mn Shares	371	310	+19.5%
No. of Trade		215,895	227,923	-5.3%

* Average Interbank Exchange Rate is BDT 123.76 as of Jul 26, 2026

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Figure: Sectorial Turnover (BDT Mn)

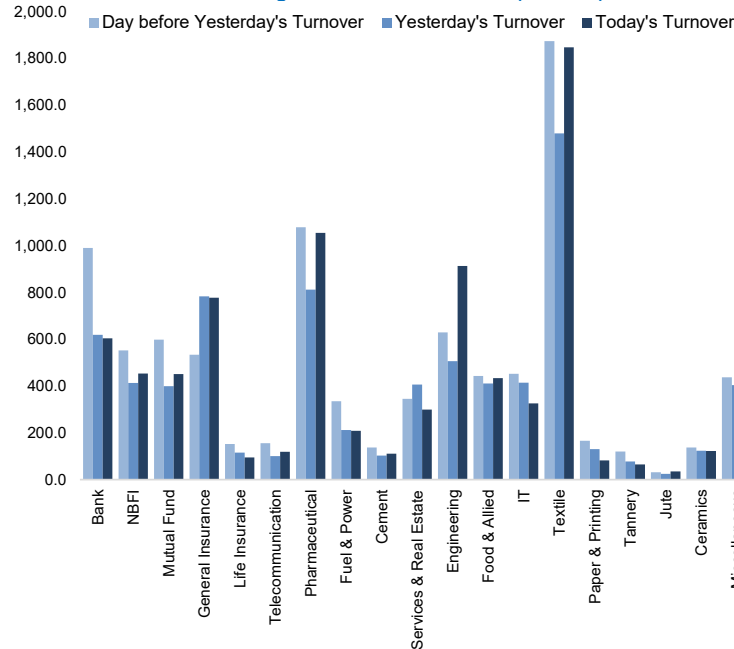
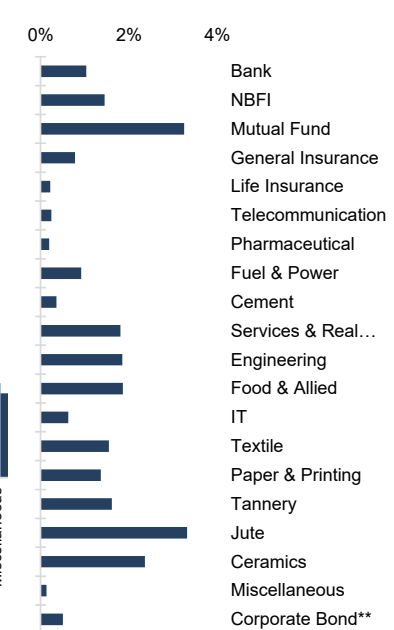


Figure: Sectorial Mcap Change



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	1,590	1,574	+16.35	+1.04%	36	757,930	10.8%	603.8	7.2%	7.2x	0.8x	GP	350,943	9.5%	45.2	10.0x	6.3x
NBFI	1,212	1,195	+17.36	+1.45%	23	115,261	1.6%	452.6	5.4%	NM	1.2x	SQURPHARMA	193,601	5.3%	157.1	7.5x	1.3x
Mutual Fund	681	660	+21.45	+3.25%	36	32,804	0.5%	450.9	5.4%	NM	0.6x	ROBI	170,233	4.6%	57.2	16.3x	2.4x
General Insurance	4,233	4,200	+32.89	+0.78%	43	119,584	1.7%	777.7	9.3%	18.5x	1.7x	BRACBANK	148,135	4.0%	114.0	7.4x	1.3x
Life Insurance	1,875	1,871	+4.13	+0.22%	15	52,863	0.8%	94.2	1.1%	NM	NM	WALTONHIL	131,589	3.6%	7.0	13.1x	1.1x
Telecommunication	4,744	4,732	+11.59	+0.24%	3	550,447	7.8%	118.9	1.4%	11.4x	3.8x	BATBC	126,360	3.4%	134.6	21.7x	2.2x
Pharmaceutical	3,199	3,193	+6.24	+0.20%	34	603,840	8.6%	1,054.4	12.6%	11.0x	1.5x	MARICO	86,518	2.4%	20.7	7.5x	29.8x
Fuel & Power	1,164	1,153	+10.63	+0.92%	23	307,230	4.4%	208.3	2.5%	9.9x	0.6x	UPGDCL	72,288	2.0%	7.2	7.8x	1.5x
Cement	2,195	2,187	+7.90	+0.36%	7	103,279	1.5%	110.8	1.3%	24.4x	2.2x	BERGERPBL	68,709	1.9%	3.5	18.5x	3.5x
Services & Real Estate	1,199	1,178	+21.30	+1.81%	9	65,250	0.9%	299.6	3.6%	26.6x	0.5x	LHB	67,940	1.8%	70.7	14.0x	3.4x
Engineering	2,782	2,732	+50.59	+1.85%	42	311,889	4.4%	913.2	10.9%	17.6x	0.9x	PUBALIBANK	59,345	1.6%	17.6	5.3x	0.8x
Food & Allied	12,990	12,752	+237.75	+1.86%	21	237,140	3.4%	434.1	5.2%	33.9x	3.5x	CITYBANK	55,631	1.5%	49.8	3.8x	0.8x
IT	2,657	2,640	+16.55	+0.63%	11	35,179	0.5%	325.2	3.9%	45.7x	2.1x	RENATA	54,584	1.5%	15.3	20.0x	1.5x
Textile	1,453	1,430	+22.10	+1.55%	58	151,088	2.2%	1,846.5	22.1%	NM	1.0x	ISLAMIBANK	51,198	1.4%	2.1	NM	0.7x
Paper & Printing	4,905	4,839	+66.20	+1.37%	6	22,974	0.3%	82.5	1.0%	NM	1.5x	DUTCHBANGL	49,534	1.3%	24.1	4.4x	0.8x
Tannery	2,224	2,189	+35.29	+1.61%	6	25,825	0.4%	64.6	0.8%	NM	1.6x	ICB	40,414	1.1%	3.5	NM	1.5x
Jute	13,497	13,063	+433.36	+3.32%	3	2,944	0.0%	34.8	0.4%	NM	1.8x	EBL	39,942	1.1%	80.9	4.7x	0.7x
Ceramics	510	498	+11.77	+2.36%	5	23,047	0.3%	122.3	1.5%	NM	1.5x	UNILEVERCL	39,578	1.1%	0.7	50.9x	16.8x
Miscellaneous	2,507	2,504	+3.37	+0.13%	15	136,134	1.9%	360.3	4.3%	53.3x	1.0x	PRIMEBANK	37,168	1.0%	13.4	4.1x	0.8x
Corporate Bond**	18,501	18,409	+92.88	+0.50%	16	40,933	0.6%	7.8	0.1%	NM	NM	BSRMSTEEL	35,753	1.0%	33.1	5.9x	1.0x
Treasury Bond**	2,168	2,168	-0.17	-0.01%	232	3,329,579	47.4%	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
RINGSHINE	4.4	+10.0%	44.3	NM	NM	SQURPHARMA	108,126	7.0%	7.5x	1.3x	FEKDIL	27.6	+3.4%	317.8	NM	1.4x
DESHBANDHU	23.4	+9.9%	139.9	NM	2.0x	BRACBANK	79,741	5.1%	7.4x	1.3x	IPDC	32.0	+3.6%	195.8	28.4x	1.9x
FARCHEM	26.2	+9.6%	129.6	NM	0.9x	ISLAMIBANK	51,106	3.3%	NM	0.7x	DOMINAGE	78.4	+3.7%	182.0	NM	4.6x
NEWLINE	6.0	+9.1%	6.2	NM	0.2x	BXPBARMA	45,851	3.0%	7.6x	1.1x	MLDYEING	18.0	-	181.2	NM	1.5x
GHCL	25.2	+8.6%	27.7	NM	0.4x	WALTONHIL	43,306	2.8%	13.1x	1.1x	DSSL	14.2	+2.2%	168.5	NM	0.8x
EBLNBRMF	3.9	+8.33%	19.6	NM	0.4x	PUBALIBANK	40,432	2.6%	5.3x	0.8x	ITC	53.1	+1.5%	158.8	15.9x	2.1x
LRBDL	15.7	+8.3%	36.0	NM	1x	CITYBANK	38,736	2.5%	3.8x	0.8x	SQURPHARMA	218.4	-0.5%	157.1	7.5x	1.3x
EXIM1STMF	5.3	+8.2%	23.9	NM	0.6x	GP	35,094	2.3%	10.0x	6.3x	SHARPIND	36.5	+6.1%	154.7	NM	4.6x
TRUSTB1MF	4.0	+8.1%	19.2	NM	0.4x	BATBC	33,422	2.2%	21.7x	2.2x	BEXIMCO	23.1	-1.7%	147.6	NM	0.3x
PHOENIXFIN	4.1	+7.9%	2.9	NM	NM	EBL	27,384	1.8%	4.7x	0.7x	IBP	20.1	+6.3%	147.1	NM	1.6x
						RENATA	26,588	1.7%	20.0x	1.5x						
						LHB	24,873	1.6%	14.0x	3.4x						
						PRIMEBANK	23,219	1.5%	4.1x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	OLYMPIC	19,319	1.2%	16.3x	2.3x	FEKDIL	26.7	25.0	8.0	5,280	133.60
PROGRESLIF	38.3	-3.3%	2.2	NM	NM	UTTARABANK	18,031	1.2%	NM	0.8x	DOMINAGE	76.5	76.5	1.0	655	50.11
NURANI	3.0	-3.2%	1.0	NM	0x	ROBI	17,023	1.1%	16.3x	2.4x	RELIANCINS	121.9	104.0	3.0	252	28.03
QUEENSOUTH	17.4	-2.0%	12.6	NM	4.7x	ALARABANK	17,011	1.1%	20.7x	0.8x	PARAMOUNT	68.0	67.5	3.0	325	21.95
YPL	25.0	-2.0%	12.6	NM	4.7x	BSRMLTD	16,263	1.0%	4.7x	0.6x	SUNLIFEINS	74.3	64.5	2.0	325	21.70
BEXIMCO	23.1	-1.7%	147.6	NM	0.3x	BEACONPHAR	15,045	1.0%	17.2x	3.2x	LOVELLO	76.6	71.9	2.0	230	17.58
HEIDELBCEM	220.0	-1.7%	13.5	NM	3.1x	BEXIMCO	14,574	0.9%	NM	0.3x	IPDC	33.9	33.9	1.0	460	15.59
UNITEDINS	50.3	-1.6%	13.3	13.3x	1.4x						CITYGENINS	103.0	98.1	4.0	137	13.51
SONARBAINS	38.2	-1.5%	9.4	NM	1.9x						ORIONINFU	304.5	304.5	1.0	42	12.79
SAFKOSPINN	20.4	-1.4%	1.1	85.0x	NM						EXIM1STMF	5.3	4.8	4.0	1,604	8.30
SSSTEEL	7.2	-1.4%	4.3	NM	0.3x											
						* 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										

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** 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
FEKDIL	26.7	25.0	133.6	5,280	8
DOMINAGE	76.5	76.5	50.1	655	1
RELIANCINS	121.9	104.0	28.0	252	3
PARAMOUNT	68.0	67.5	22.0	325	3
SUNLIFEINS	74.3	64.5	21.7	325	2
LOVELLO	76.6	71.9	17.6	230	2
IPDC	33.9	33.9	15.6	460	1
CITYGENINS	103.0	98.1	13.5	137	4
ORIONINFU	304.5	304.5	12.8	42	1
EXIM1STMF	5.3	4.8	8.3	1,604	4
MARICO	2,720.0	2,720.0	5.4	2	1
MLDYEING	19.8	19.8	5.2	263	2
GQBALLPEN	555.0	555.0	4.0	7	1
SIPLC	109.0	109.0	2.0	18	1
TECHNODRUG	47.8	47.8	1.8	39	2
IBP	17.1	17.1	1.7	101	1
BANGAS	121.7	121.7	1.4	12	1
SALVO	39.0	39.0	1.1	28	1
PRAGATIINS	69.0	69.0	1.0	15	1
PTL	66.9	66.9	1.0	15	2
RUPALILIFE	80.1	80.1	1.0	12	1
SIMTEX	25.9	25.9	0.9	36	1
Total			358.6		59

Important DSE News

RAKCERAMIC

(Q2 Un-audited): Consolidated EPS was Tk. 0.18 for April-June 2026 as against Tk. (0.43) for April-June 2025; Consolidated EPS was Tk. 0.05 for January-June 2026 as against Tk. (0.49) for January-June 2025. Consolidated NOCFPS was Tk. 0.12 for January-June 2026 as against Tk. 0.16 for January-June 2025. Consolidated NAV per share was Tk. 15.08 as on June 30, 2026 and Tk. 15.73 as on June 30, 2025.

PEOPLESINS

(Q2 Un-audited): EPS was Tk. 1.64 for April-June 2026 as against Tk. 0.86 for April-June 2025; EPS was Tk. 2.93 for January-June 2026 as against Tk. 1.49 for January-June 2025. NOCFPS was Tk. 2.68 for January-June 2026 as against Tk. 1.66 for January-June 2025. NAV per share was Tk. 40.88 as on June 30, 2026 and Tk. 36.30 as on June 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
AL-HAJTEX		0.0%	3.0%	Record Date	16-Aug-26
RUPALILIFE		0.0%	12.0%	Record Date	20-Aug-26
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26

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