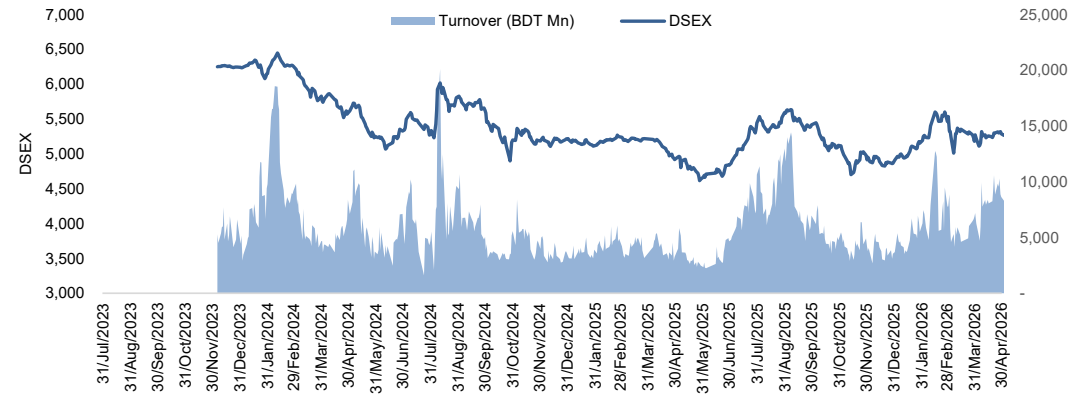


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.52%) lost 85.71 points and closed at 5,554.18. The blue-chip index DS30 (-1.65%), the Shariah-based index DSES (-1.68%), and the large-cap index CDSET (-1.23%) closed at 2,110.03, 1,129.34, and 1,119.14 points, respectively. All the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 2.85% followed by Engineering (-1.96%), Telecommunication (-1.53%), Bank (-1.23%), Food & Allied (-1.21%), Pharmaceutical (-1.12%), and Fuel & Power (-1.11%), respectively. Block trades contributed 3.4% of the overall market turnover. Beximco Pharmaceuticals PLC. (-1.6%) was the most traded share with a turnover of BDT 655 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,554.18	5,639.89	-85.71	-1.52%	+14.2%
DS30	2,110.03	2,145.54	-35.50	-1.65%	+13.8%
DSES	1,129.34	1,148.65	-19.31	-1.68%	+12.9%
CDSET	1,119.14	1,133.11	-13.97	-1.23%	+11.4%

	Advanced	Declined	Unchanged	Total
All Category	36	319	34	389
A Category (Equity)	16	171	8	195
B Category (Equity)	4	69	2	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	16	79	24	119
Mutual Funds	0	28	6	34
Corporate Bonds	1	1	0	2
Treasury Bonds	1	1	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,869,079	6,928,539	-0.9%
	Mn USD	55,867	56,351	
Turnover	Mn BDT	8,761	10,024	
	Mn USD	71	82	-12.6%
Volume	Mn Shares	287	329	-12.6%
No. of Trade		238,925	251,939	-5.2%

* Average Interbank Exchange Rate is BDT 122.95 as of Jun 22, 2026

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Figure: Sectorial Turnover (BDT Mn)

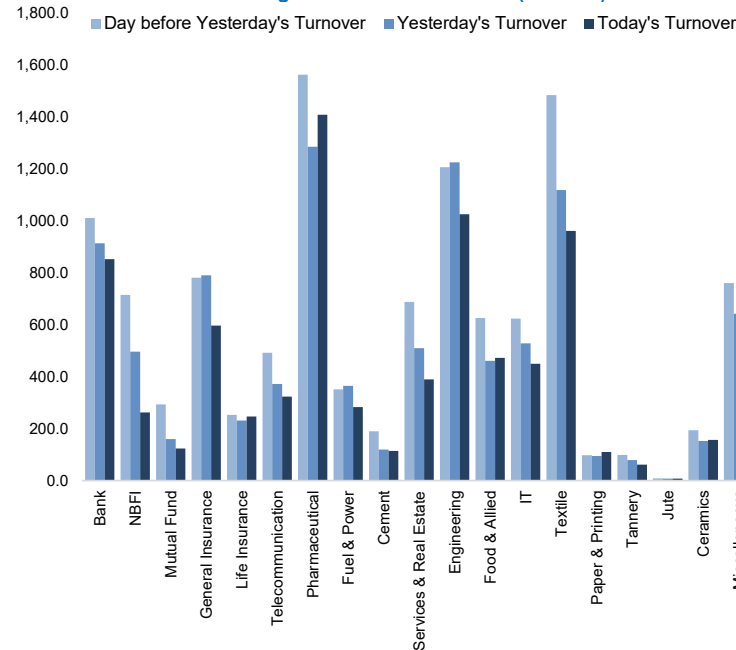
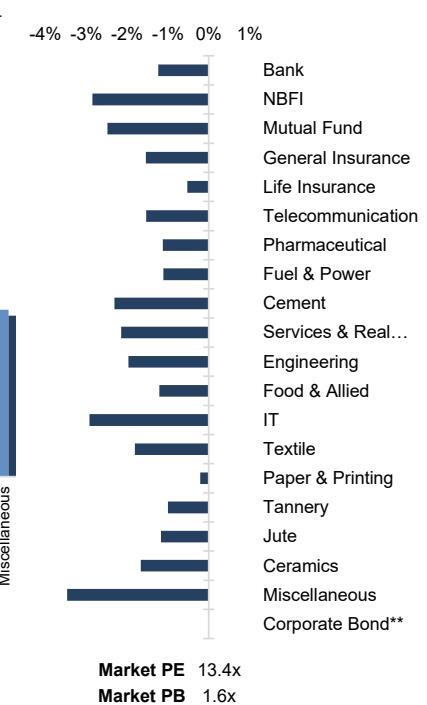


Figure: Sectorial Mcap Change



* 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	1,547	1,566	-19.28	-1.23%	36	737,261	10.7%	851.1	10.1%	7.1x	0.7x	GP	343,111	9.7%	72.3	11.5x	5.5x
NBFI	1,074	1,106	-31.50	-2.85%	23	102,163	1.5%	261.8	3.1%	NM	1.1x	SQURPHARMA	195,285	5.5%	171.5	7.6x	1.3x
Mutual Fund	536	550	-13.62	-2.48%	36	25,831	0.4%	123.6	1.5%	NM	0.5x	ROBI	168,138	4.8%	217.1	16.1x	2.3x
General Insurance	3,954	4,016	-61.74	-1.54%	43	111,714	1.6%	596.0	7.0%	18.0x	1.6x	BRACBANK	149,509	4.2%	191.9	7.5x	1.3x
Life Insurance	1,880	1,890	-9.89	-0.52%	15	52,986	0.8%	246.3	2.9%	NM	NM	WALTONHIL	126,024	3.6%	10.3	12.5x	1.0x
Telecommunication	4,644	4,716	-72.12	-1.53%	3	538,818	7.8%	322.9	3.8%	12.6x	3.5x	BATBC	115,830	3.3%	30.6	24.4x	2.1x
Pharmaceutical	3,135	3,170	-35.54	-1.12%	34	591,695	8.6%	1,407.2	16.6%	11.3x	1.5x	MARICO	86,915	2.5%	14.2	7.6x	30.0x
Fuel & Power	1,103	1,116	-12.39	-1.11%	23	291,235	4.2%	282.4	3.3%	9.3x	0.6x	UPGDCL	70,723	2.0%	6.7	7.6x	1.5x
Cement	2,033	2,081	-48.04	-2.31%	7	95,657	1.4%	114.4	1.4%	22.2x	2.1x	BERGERPBL	69,156	2.0%	15.7	11.2x	3.5x
Services & Real Estate	1,103	1,127	-24.11	-2.14%	9	60,012	0.9%	389.1	4.6%	23.4x	0.4x	BXPHERMA	63,794	1.8%	655.0	10.0x	1.3x
Engineering	2,593	2,645	-51.97	-1.96%	42	290,624	4.2%	1,024.6	12.1%	14.9x	0.9x	PUBALIBANK	57,159	1.6%	4.1	5.1x	0.8x
Food & Allied	12,225	12,375	-149.62	-1.21%	21	223,172	3.2%	472.3	5.6%	37.5x	3.4x	ISLAMIBANK	54,257	1.5%	8.1	NM	0.8x
IT	2,409	2,481	-72.39	-2.92%	11	31,900	0.5%	449.7	5.3%	36.0x	1.9x	CITYBANK	52,657	1.5%	102.8	3.6x	0.8x
Textile	1,243	1,266	-22.89	-1.81%	58	129,285	1.9%	960.2	11.3%	NM	0.9x	RENATA	51,292	1.5%	37.0	18.8x	1.4x
Paper & Printing	4,618	4,628	-9.48	-0.20%	6	21,630	0.3%	110.5	1.3%	NM	1.4x	DUTCHBANGL	43,647	1.2%	15.4	3.8x	0.7x
Tannery	2,054	2,075	-20.71	-1.00%	6	23,852	0.3%	61.1	0.7%	NM	1.5x	EBL	40,763	1.2%	105.1	4.8x	0.8x
Jute	11,608	11,745	-137.47	-1.17%	3	2,532	0.0%	8.1	0.1%	NM	1.6x	UNILEVERCL	39,632	1.1%	2.0	51.0x	16.8x
Ceramics	482	490	-8.15	-1.66%	5	21,757	0.3%	156.5	1.9%	NM	1.4x	ICB	37,552	1.1%	9.0	NM	1.4x
Miscellaneous	2,735	2,833	-98.20	-3.47%	15	148,510	2.2%	618.8	7.3%	29.6x	1.1x	BEXIMCO	36,503	1.0%	45.0	NM	0.5x
Corporate Bond**	18,889	18,888	+1.27	+0.01%	16	41,791	0.6%	0.7	0.0%	NM	NM	PRIMEBANK	36,437	1.0%	30.7	4.0x	0.8x
Treasury Bond**	2,168	2,171	-3.06	-0.14%	232	3,330,738	48.5%	2.5	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
PLFSL	1.3	+8.3%	0.8	NM	NM	SQURPHARMA	109,067	7.3%	7.6x	1.3x	BXPHERMA	143.0	-1.6%	655.0	10.0x	1.3x
FAREASTFIN	1.3	+8.3%	0.6	NM	NM	BRACBANK	80,480	5.4%	7.5x	1.3x	SAPORTL	52.8	-2.9%	275.9	24.9x	1.5x
SAFKOSPINN	20.3	+6.3%	3.4	84.6x	NM	ISLAMIBANK	54,159	3.6%	NM	0.8x	NFML	22.4	+1.8%	243.3	NM	2.0x
FIRSTFIN	4.3	+4.9%	0.7	NM	NM	BXPHERMA	44,573	3.0%	10.0x	1.3x	BDTHAI	19.5	-8.0%	217.4	NM	0.7x
BNICL	105.9	+4.6%	56.1	19.8x	3.2x	WALTONHIL	41,475	2.8%	12.5x	1.0x	ROBI	32.1	-2.4%	217.1	16.1x	2.3x
BBS	15.6	+4.00%	87.2	NM	1.4x	PUBALIBANK	41,040	2.8%	5.1x	0.8x	BRACBANK	65.3	-1.2%	191.9	7.5x	1.3x
SBACBANK	6.4	+3.2%	1.1	6.0x	0x	CITYBANK	36,665	2.5%	3.6x	0.8x	SQURPHARMA	220.3	-1.0%	171.5	7.6x	1.3x
JMISMDL	138.9	+3.0%	23.3	NM	1.7x	GP	34,311	2.3%	11.5x	5.5x	DOMINAGE	71.6	-9.9%	170.8	NM	4.2x
PRAGATILIF	186.9	+2.6%	64.8	NM	NM	BATBC	30,637	2.1%	24.4x	2.1x	NCCBANK	15.6	-2.5%	131.4	3.2x	0.5x
HAMI	148.9	+2.5%	3.9	NM	16.4x	EBL	27,947	1.9%	4.8x	0.8x	APEXSPINN	352.4	-5.3%	126.8	NM	4.2x
						RENATA	24,984	1.7%	18.8x	1.4x						
						BEXIMCO	24,417	1.6%	NM	0.5x						
						LHB	23,045	1.6%	13.0x	3.1x						
						PRIMEBANK	22,762	1.5%	4.0x	0.8x						
						OLYMPIC	18,743	1.3%	15.8x	2.2x						
						UTTARABANK	18,397	1.2%	21.7x	0.8x						
						ROBI	16,814	1.1%	16.1x	2.3x						
						BEACONPHAR	14,865	1.0%	17.0x	3.2x						
						BSRMLTD	14,479	1.0%	4.2x	0.5x						
						ALARABANK	14,470	1.0%	17.6x	0.7x						

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DOMINAGE	71.6	-9.9%	170.8	NM	4.2x	CITYGENINS	106.3	106.3	1.0	795	84.51
BEXIMCO	38.7	-9.8%	45.0	NM	0x	NBL	3.6	3.6	2.0	7,650	27.54
BDTHAI	19.5	-7.6%	125.4	23.8x	1.6x	APEXSPINN	369.0	369.0	2.0	40	14.91
IPDC	26.8	-7.6%	125.4	23.8x	1.6x	TECHNODRUG	38.5	38.5	1.0	319	12.30
QBALLPEN	593.8	-7.5%	27.9	NM	4.2x	IPDC	31.5	26.1	5.0	420	11.09
FINEFOODS	488.2	-7.5%	51.0	62.3x	23.1x	CITYBANK	30.9	30.3	2.0	251	7.73
BIFC	4.0	-7.0%	0.7	NM	NM	BXPHERMA	150.0	150.0	1.0	50	7.52
USMANIAGL	37.3	-6.3%	3.3	NM	0.6x	FINEFOODS	545.9	488.2	3.0	15	7.50
ACFL	22.9	-6.1%	3.4	99.6x	0.7x	PRIMEBANK	30.3	30.3	1.0	221	6.68
BDTHAIFOOD	25.0	-6.0%	72.5	NM	2.1x	SUNLIFEINS	69.5	69.5	1.0	90	6.26

* 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
CITYGENINS	106.3	106.3	84.5	795	1
NBL	3.6	3.6	27.5	7,650	2
APEXSPINN	369.0	369.0	14.9	40	2
TECHNODRUG	38.5	38.5	12.3	319	1
IPDC	31.5	26.1	11.1	420	5
CITYBANK	30.9	30.3	7.7	251	2
BXPHARMA	150.0	150.0	7.5	50	1
FINEFOODS	545.9	488.2	7.5	15	3
PRIMEBANK	30.3	30.3	6.7	221	1
SUNLIFEINS	69.5	69.5	6.3	90	1
EBL	25.0	25.0	6.2	249	1
ISLAMIINS	65.0	63.9	6.1	94	3
MEGHNA PET	68.2	68.2	5.9	86	1
ICBAGRANI1	8.0	8.0	5.6	700	1
PIONEERINS	70.7	70.7	5.0	71	1
BRACBANK	65.7	65.7	4.9	75	1
ETL	14.0	14.0	4.6	325	1
TILIL	56.7	56.7	4.5	80	3
PEOPLESINS	60.6	60.6	4.3	71	1
ICICL	31.3	31.2	3.7	117	2
ADNTEL	60.5	60.5	3.5	58	1
CLICL	54.0	54.0	3.4	63	1
Total			300.9		91

Important DSE News
PRAGATILIF

The Board of Directors has recommended 15% Cash and 10% Stock dividend for all shareholders for the year ended on 31-Dec-2025. Date of AGM: 13-Aug-2026, Time: 12:30 PM, Venue: Digital platform (Zoom cloud meeting). Record Date: 14-Jul-2026. Reasons for stock dividend recommendation: 1. BMRE (Building Construction); 2. Increase Paid up Capital; 3 Investment.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
UNIONINS		0.0%	10.0%	Record Date	25-Jun-26
PURABIGEN		0.0%	10.0%	Record Date	25-Jun-26
NORTHRNINS		5.0%	5.0%	Record Date	28-Jun-26
SUNLIFEINS		0.0%	0.0%	Record Date	5-Jul-26
DGIC		0.0%	2.0%	Record Date	7-Jul-26
BERGERPBL		0.0%	525.0%	Record Date	7-Jul-26
PRIMELIFE		0.0%	0.3%	Record Date	16-Jul-26
GLOBALINS		0.0%	10.0%	Record Date	20-Jul-26
SICL		0.0%	10.0%	Record Date	23-Jul-26

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