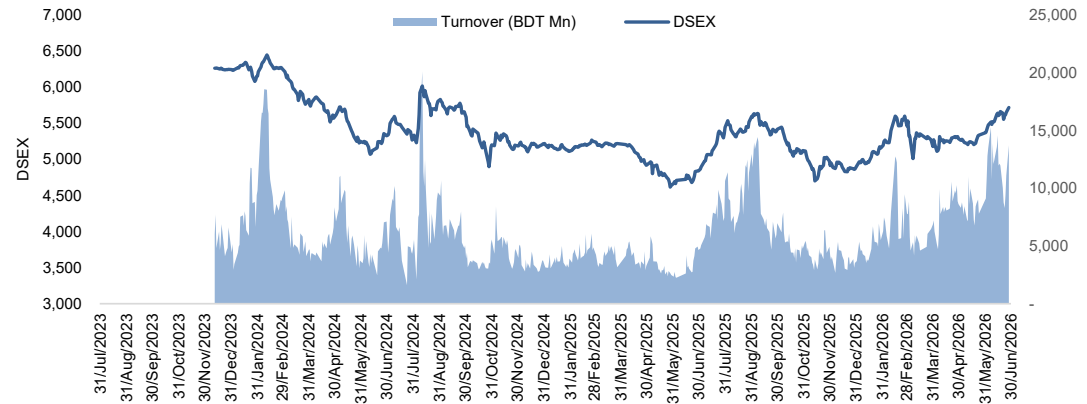


**Daily Market Update**

Market closed in green

The market closed in green today. The benchmark index DSEX (+1.18%) gained 66.94 points and closed at 5,719.76. The blue-chip index DS30 (+1.47%), the Shariah-based index DSES (+1.16%), and the large-cap index CDSET (+1.51%) closed at 2,162.57, 1,156.96, and 1,142.56 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.72% followed by Bank (+1.41%), Fuel & Power (+1.37%), Telecommunication (+1.28%), Engineering (+1.11%), Pharmaceutical (+0.97%), and NBFI (+0.04%), respectively. Block trades contributed 7.2% of the overall market turnover. Bangladesh Export Import Company Ltd. (+9.9%) was the most traded share with a turnover of BDT 1,056 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,719.76	5,652.82	+66.94	+1.18%	+17.6%
DS30	2,162.57	2,131.16	+31.41	+1.47%	+16.7%
DSES	1,156.96	1,143.65	+13.31	+1.16%	+15.6%
CDSET	1,142.56	1,125.52	+17.04	+1.51%	+13.7%

	Advanced	Declined	Unchanged	Total
All Category	213	133	48	394
A Category (Equity)	111	70	18	199
B Category (Equity)	37	33	5	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	65	30	25	120
Mutual Funds	14	6	14	34
Corporate Bonds	1	1	0	2
Treasury Bonds	3	3	0	6

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,968,094	6,925,268	+0.6%
	Mn USD	56,529	56,181	
Turnover	Mn BDT	13,710	11,107	+23.4%
	Mn USD	111	90	
Volume	Mn Shares	447	331	+35.0%
No. of Trade		285,232	245,814	+16.0%

\* Average Interbank Exchange Rate is BDT 123.27 as of Jun 28, 2026

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Figure: Sectorial Turnover (BDT Mn)

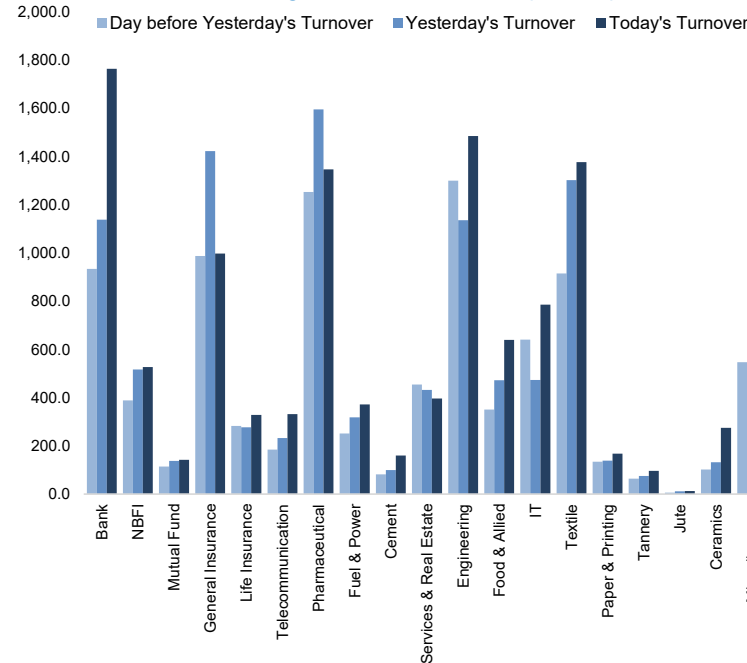
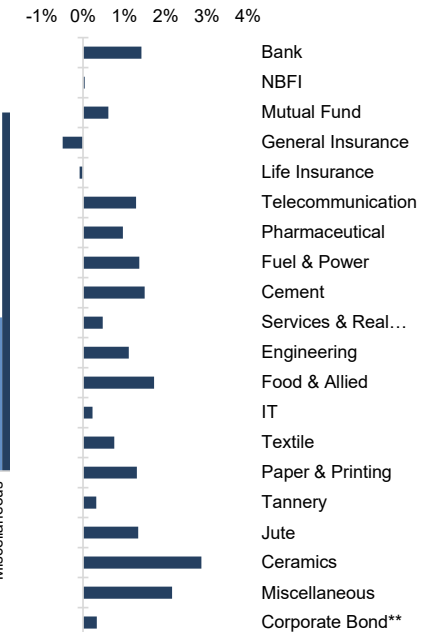


Figure: Sectorial Mcap Change



Market PE 13.7x

Market PB 1.6x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFI 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	1,571	1,549	+21.90	+1.41%	36	748,765	10.7%	1,763.2	13.9%	7.0x	0.7x	GP	350,403	9.7%	71.2	11.7x	5.6x
NBFI	1,140	1,139	+0.48	+0.04%	23	108,361	1.6%	526.8	4.1%	NM	1.2x	SQRPHARMA	200,781	5.6%	233.8	7.8x	1.3x
Mutual Fund	548	545	+3.34	+0.61%	36	26,397	0.4%	141.5	1.1%	NM	0.5x	ROBI	172,328	4.8%	215.0	16.5x	2.4x
General Insurance	4,202	4,223	-20.97	-0.50%	43	118,720	1.7%	997.0	7.8%	19.1x	1.7x	BRACBANK	152,714	4.2%	320.5	7.7x	1.4x
Life Insurance	1,929	1,931	-1.61	-0.08%	15	54,381	0.8%	328.2	2.6%	NM	NM	WALTONHIL	128,757	3.6%	16.8	12.8x	1.1x
Telecommunication	4,749	4,689	+60.17	+1.28%	3	551,086	7.9%	331.4	2.6%	12.8x	3.6x	BATBC	119,880	3.3%	74.2	25.2x	2.1x
Pharmaceutical	3,195	3,164	+30.64	+0.97%	34	603,084	8.6%	1,345.4	10.6%	11.0x	1.5x	MARICO	87,422	2.4%	26.8	7.6x	30.2x
Fuel & Power	1,139	1,123	+15.34	+1.37%	23	300,566	4.3%	371.5	2.9%	9.7x	0.6x	UPGDCL	72,404	2.0%	5.6	7.8x	1.5x
Cement	2,102	2,071	+30.93	+1.49%	7	98,915	1.4%	159.4	1.3%	22.9x	2.1x	BERGERPBL	70,187	1.9%	18.7	18.9x	3.6x
Services & Real Estate	1,159	1,153	+5.54	+0.48%	9	63,059	0.9%	396.3	3.1%	22.4x	0.5x	LHB	64,456	1.8%	56.2	13.3x	3.2x
Engineering	2,684	2,655	+29.45	+1.11%	42	300,878	4.3%	1,484.5	11.7%	17.4x	0.9x	PUBALIBANK	57,940	1.6%	28.3	5.1x	0.8x
Food & Allied	12,624	12,410	+213.71	+1.72%	21	230,462	3.3%	639.4	5.0%	38.9x	3.5x	CITYBANK	54,232	1.5%	278.3	3.7x	0.8x
IT	2,480	2,474	+5.61	+0.23%	11	32,840	0.5%	785.7	6.2%	37.1x	2.0x	RENATA	51,763	1.4%	42.9	19.0x	1.4x
Textile	1,310	1,301	+9.86	+0.76%	58	136,304	2.0%	1,376.3	10.8%	NM	0.9x	ISLAMIBANK	51,681	1.4%	21.8	NM	0.8x
Paper & Printing	4,794	4,732	+61.85	+1.31%	6	22,456	0.3%	167.9	1.3%	NM	1.5x	DUTCHBANGL	45,372	1.3%	27.8	4.0x	0.7x
Tannery	2,129	2,122	+6.76	+0.32%	6	24,722	0.4%	95.9	0.8%	NM	1.5x	ICB	40,935	1.1%	36.6	NM	1.5x
Jute	12,142	11,982	+160.43	+1.34%	3	2,648	0.0%	13.0	0.1%	NM	1.7x	EBL	40,928	1.1%	108.1	4.8x	0.8x
Ceramics	497	483	+13.86	+2.87%	5	22,445	0.3%	275.1	2.2%	NM	1.5x	UNILEVERCL	39,987	1.1%	8.3	51.4x	16.9x
Miscellaneous	2,652	2,596	+56.04	+2.16%	15	143,988	2.1%	1,485.8	11.7%	56.8x	1.1x	PRIMEBANK	36,680	1.0%	65.8	4.1x	0.8x
Corporate Bond**	18,097	18,037	+59.89	+0.33%	16	40,038	0.6%	28.3	0.2%	NM	NM	POWERGRID	35,821	1.0%	27.9	8.8x	0.3x
Treasury Bond**	2,176	2,175	+1.08	+0.05%	232	3,342,012	47.9%	12.7	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
BEXIMCO	31.2	+9.9%	1,055.6	NM	0.4x	SQRPHARMA	112,136	7.4%	7.8x	1.3x	BEXIMCO	31.2	+9.9%	1,055.6	NM	0.4x
WMSHIPYARD	10.5	+9.4%	48.9	NM	0.6x	BRACBANK	82,206	5.4%	7.7x	1.4x	NCCBANK	16.1	+0.6%	488.7	3.3x	0.6x
DSHGARME	156.4	+9.3%	73.4	NM	1.0x	ISLAMIBANK	51,588	3.4%	NM	0.8x	ITC	47.1	+4.7%	406.5	14.1x	1.9x
CENTRALPHL	10.8	+9.1%	47.3	NM	1.6x	BXPBARMA	44,355	2.9%	7.3x	1.1x	DOMINAGE	79.7	+5.0%	364.7	NM	4.7x
ILFSL	1.2	+9.1%	1.5	NM	NM	WALTONHIL	42,374	2.8%	12.8x	1.1x	IPDC	30.5	-1.3%	354.7	27.0x	1.8x
SHYAMPSUG	225.5	+8.73%	27.1	NM	NM	PUBALIBANK	39,474	2.6%	5.1x	0.8x	BRACBANK	66.7	+2.1%	320.5	7.7x	1.4x
IBP	16.6	+8.5%	150.5	NM	1x	CITYBANK	37,761	2.5%	3.7x	0.8x	CITYBANK	31.0	+2.0%	278.3	3.7x	0.8x
PLFSL	1.3	+8.3%	0.7	NM	NM	GP	35,040	2.3%	11.7x	5.6x	BXPBARMA	142.3	+2.0%	242.8	7.3x	1.1x
USMANIAGL	42.1	+7.9%	3.3	NM	0.7x	BATBC	31,708	2.1%	25.2x	2.1x	BDTHAI	21.9	-0.5%	237.9	NM	0.8x
AAMRATECH	16.4	+7.2%	11.2	NM	0.8x	EBL	28,060	1.8%	4.8x	0.8x	SQRPHARMA	226.5	+1.1%	233.8	7.8x	1.3x

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)
DAFODILCOM	146.4	-4.3%	43.8	NM	11.1x	JAMUNABANK	23.0	23.0	1.0	18,815	432.74
CAPMIBBLMF	9.7	-4.0%	4.1	NM	1x	GQBALLPEN	664.5	608.0	9.0	208	132.00
RELIANCINS	115.4	-3.8%	116.1	NM	2.1x	CITYGENINS	107.0	100.0	4.0	988	104.68
NFML	23.1	-3.8%	116.1	NM	2.1x	FINEFOODS	549.4	507.0	5.0	118	59.91
SUNLIFEINS	70.1	-3.7%	59.1	NM	NM	IPDC	32.0	31.0	3.0	1,314	41.42
MEGCONMILK	37.9	-3.6%	5.6	NM	NM	DOMINAGE	79.5	73.3	4.0	357	28.04
SKTRIMS	14.1	-3.4%	6.4	NM	1.2x	LOVELLO	77.2	70.0	7.0	355	25.01
TUNGHAI	2.9	-3.3%	0.5	NM	NM	BDTHAI	21.8	21.5	3.0	794	17.19
GENNEXT	3.0	-3.2%	1.9	27.3x	0.3x	MTB	14.3	14.3	2.0	1,171	16.75
REGENTTEX	6.4	-3.0%	2.2	NM	0.2x	MALEKSPIN	31.9	31.9	1.0	480	15.31

\* 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
JAMUNABANK	23.0	23.0	432.7	18,815	1
GQBALLPEN	664.5	608.0	132.0	208	9
CITYGENINS	107.0	100.0	104.7	988	4
FINEFOODS	549.4	507.0	59.9	118	5
IPDC	32.0	31.0	41.4	1,314	3
DOMINAGE	79.5	73.3	28.0	357	4
LOVELLO	77.2	70.0	25.0	355	7
BDTHAI	21.8	21.5	17.2	794	3
MTB	14.3	14.3	16.7	1,171	2
MALEKSPIN	31.9	31.9	15.3	480	1
TECHNODRUG	39.0	39.0	13.4	344	2
RAHIMTEXT	184.8	184.8	10.6	57	1
EBL	24.1	24.1	8.1	336	1
PTL	71.0	58.6	6.3	92	5
SONARBAINS	48.0	48.0	5.4	112	1
SEAPEARL	39.7	39.7	5.2	130	1
SPCL	59.5	59.5	4.9	83	2
ITC	40.5	40.5	3.8	95	1
ISLAMIINS	66.2	55.0	3.7	60	2
BEXIMCO	26.2	25.6	3.7	141	4
POPULARLIF	68.0	68.0	3.4	50	1
PRIMEINSUR	44.5	38.1	3.2	80	2
<b>Total</b>			<b>984.9</b>		<b>101</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SUNLIFEINS		0.0%	0.0%	Record Date	05-Jul-26
DGIC		0.0%	2.0%	Record Date	07-Jul-26
BERGERPBL		0.0%	525.0%	Record Date	07-Jul-26
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
SICL		0.0%	10.0%	Record Date	23-Jul-26
NHFIL		0.0%	10.0%	Record Date	23-Jul-26
BIFC		0.0%	0.0%	Record Date	30-Jul-26
FASFIN		0.0%	0.0%	Record Date	30-Jul-26
BXPBARMA		0.0%	47.5%	Record Date	02-Aug-26
ISLAMICFIN		0.0%	0.0%	Record Date	09-Aug-26

**Important DSE News**

**ISLAMICFIN**

The Board of Directors has recommended No Dividend for the year ended December 31, 2025. Date of AGM: 24.09.2026, Time: 11:00 AM, System of holding AGM: Will be informed. Venue: Will be notified through AGM notice. Record Date: 09.08.2026. The Company has also reported EPS of Tk. 0.39, NAV per share of Tk. 2.38 and NOCFPS of Tk. 0.49 for the year ended December 31, 2025 as against Tk. (12.22), Tk. 0.20 and Tk. (0.78) respectively for the year ended December 31, 2024.

EPS was Tk. (0.93) for January-March 2026 as against Tk. (0.62) for January-March 2025. NOCFPS was Tk. 0.10 for January-March 2026 as against Tk. (0.02) for January-March 2025. NAV per share was Tk. 1.46 as on March 31, 2026 and Tk. (0.42) as on March 31, 2025.

**POPULARLIF**

The Board of Directors has recommended 20% Cash Dividend for the year ended December 31, 2025. Date of AGM: 22.09.2026, Time: 12:00 PM, Venue/ Mode: Virtually by using Digital Platform through the link: <https://popularlifains.bdvirtualagm.com>. Record Date: 20.07.2026. The Company has also reported EPS of Tk. 1.47, NAV per share of Tk. 78.10 and NOCFPS of Tk. (18.86) for the year ended December 31, 2025 as against Tk. 2.53, Tk. 89.01 and Tk. (3.45) respectively for the year ended December 31, 2024.

**CLICL**

The Board of Directors has recommended 4% cash dividend for each shareholder excluding sponsors & directors for the year ended December 31, 2025. Among the total 3,75,00,000 shares, sponsors & directors hold 2,25,00,000 shares, which is 60% of total shareholding. Date of AGM: 10.08.2026, Time: 10:00 AM, Venue: Shooting Club (near Police Plaza) Gulshan 1, Dhaka. Record Date: 22.07.2026. The Company has also reported EPS of Tk. 0.17, NAV per share of Tk. 11.44 and NOCFPS of Tk. 1.68 for the year ended December 31, 2025 as against Tk. (0.11), Tk. 9.32 and Tk. 2.16 respectively for the year ended December 31, 2024.

**FASFIN**

The Board of Directors has recommended No Dividend for the year ended December 31, 2025. Date and Time of AGM: Will be notified through AGM notice. Venue: Through Hybrid System (Will be notified through AGM notice). Record Date: 30.07.2026. The Company has also reported consolidated EPS of Tk. (22.65), consolidated NAV per share of Tk. (148.05) and consolidated NOCFPS of Tk. (1.22) for the year ended December 31, 2025 as against Tk. (21.37), Tk. (125.55) and Tk. (1.21) respectively for the year ended December 31, 2024.

Consolidated EPS was Tk. (5.16) for January-March 2026 as against Tk. (4.63) for January-March 2025. Consolidated NOCFPS was Tk. (0.23) for January-March 2026 as against Tk. (0.16) for January-March 2025. Consolidated NAV per share was Tk. (153.21) as on March 31, 2026 and Tk. (129.96) as on March 31, 2025.

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