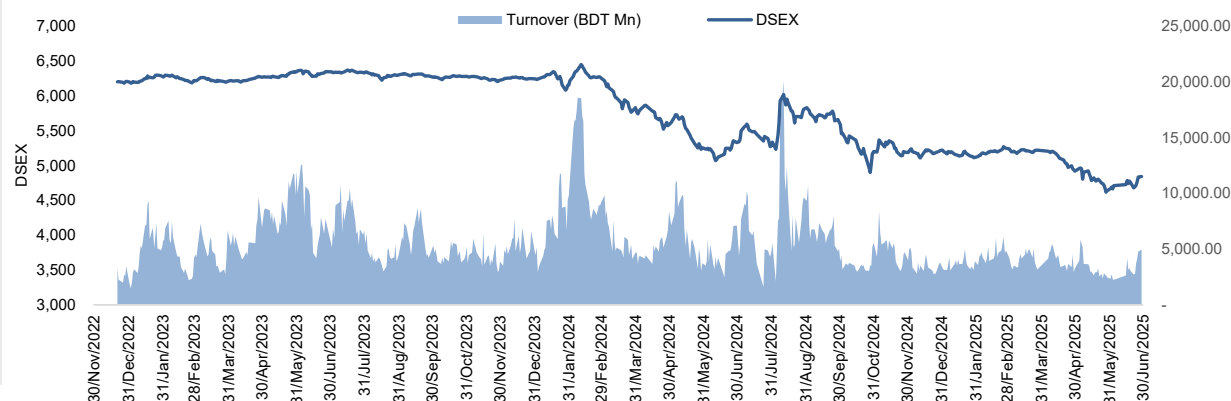


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 6.95 points and closed at 4,839.78. The blue-chip index DS30 (-0.20%), the Shariah-based index DSES (+0.22%), and the large-cap index CDSET (+0.13%) closed at 1,816.51, 1,061.48, and 992.34 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.29% followed by NBF1 (+1.28%), Bank (+0.97%), Telecommunication (+0.47%), Engineering (+0.38%), Fuel & Power (-0.05%), and Pharmaceutical (-0.26%), respectively. Block trades contributed 5.7% of the overall market turnover. BRAC Bank Ltd. (-1.6%) was the most traded share with a turnover of BDT 370 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,839.78	4,832.83	+6.95	+0.14%	-7.2%
DS30	1,816.51	1,820.10	-3.59	-0.20%	-6.4%
DSES	1,061.48	1,059.10	+2.37	+0.22%	-9.2%
CDSET	992.34	991.08	+1.26	+0.13%	-6.9%

1,200.0

Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

900.0

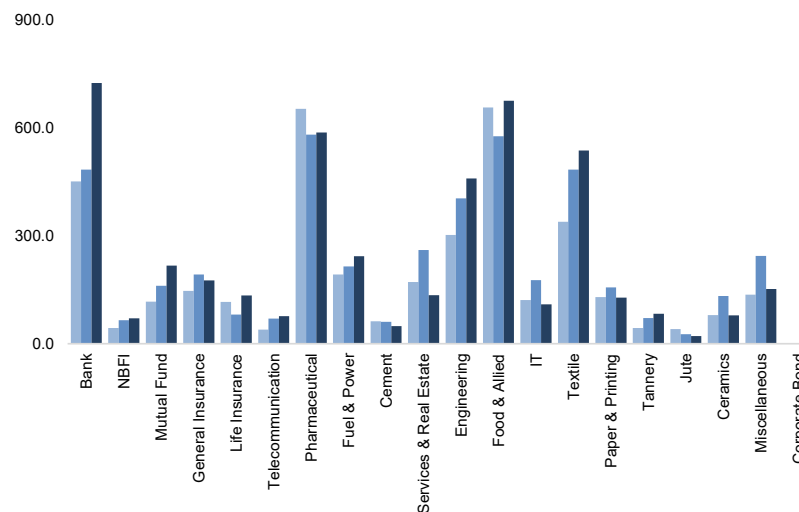
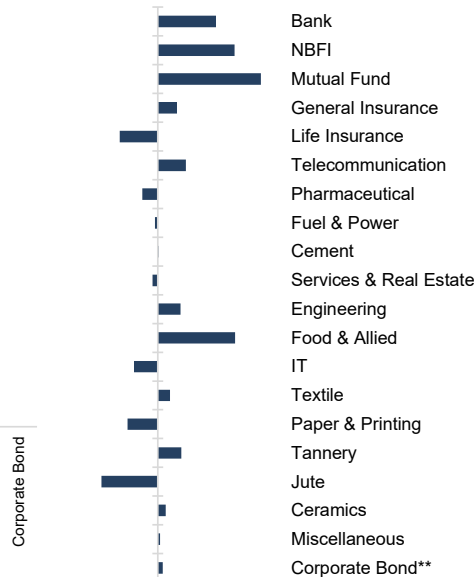


Figure: Sectorial Mcap Change

-2% -1% 0% 1% 2%



Market PE 13.1x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, ABBANK, IFIC, FIRSTSBANK and NBL

	Advanced	Declined	Unchanged	Total
All Category	186	148	60	394
A Category (Equity)	101	87	29	217
B Category (Equity)	36	35	11	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	49	26	20	95
Mutual Funds	30	2	4	36
Corporate Bonds	2	0	1	3
Treasury Bonds	1	3	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,616,435	6,615,652	+0.0%
	Mn USD	53,864	53,858	
Turnover	Mn BDT	4,943	4,787	+3.3%
	Mn USD	40	39	
Volume	Mn Shares	223	187	+19.1%
No. of Trade		161,447	152,594	+5.8%

* Average Interbank Exchange Rate is BDT 122.84 as of Jun 29, 2025

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Md Rakibul Hasan
Research Associate

(880) 1708805229

rakibul.hasan@bracepl.com

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	1,322	1,309	+12.72	+0.97%	36	625,375	9.5%	723.9	15.5%	18.1x	0.6x	GP	409,816	12.4%	39.9	14.0x	5.8x
NBFI	942	930	+11.93	+1.28%	23	89,795	1.4%	70.3	1.5%	NM	NM	SQURPHARMA	185,357	5.6%	174.1	7.9x	1.4x
Mutual Fund	620	610	+10.49	+1.72%	37	28,504	0.4%	217.0	4.7%	NM	0.5x	BATBC	154,008	4.7%	64.9	9.3x	2.9x
General Insurance	2,438	2,430	+7.85	+0.32%	43	69,579	1.1%	175.7	3.8%	11.6x	1.0x	ROBI	130,425	3.9%	32.3	18.0x	1.9x
Life Insurance	1,551	1,561	-9.94	-0.64%	15	41,249	0.6%	134.3	2.9%	NM	NM	WALTONHIL	124,685	3.8%	7.5	9.7x	1.1x
Telecommunication	4,797	4,775	+22.45	+0.47%	3	562,517	8.5%	76.7	1.6%	14.9x	3.6x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Pharmaceutical	2,787	2,794	-7.24	-0.26%	34	528,393	8.0%	586.3	12.6%	12.2x	1.4x	BRACBANK	100,144	3.0%	370.4	7.4x	1.2x
Fuel & Power	1,064	1,064	-0.50	-0.05%	23	281,820	4.3%	242.8	5.2%	17.8x	0.6x	BERGERPBL	80,540	2.4%	0.0	23.5x	5.6x
Cement	1,800	1,800	+0.17	+0.01%	7	85,794	1.3%	49.0	1.1%	20.5x	1.8x	MARICO	76,510	2.3%	17.1	13.0x	10.2x
Services & Real Estate	922	922	-0.80	-0.09%	9	50,689	0.8%	134.5	2.9%	23.3x	0.4x	UPGDCL	69,274	2.1%	1.6	5.9x	1.6x
Engineering	2,268	2,260	+8.55	+0.38%	42	255,877	3.9%	459.1	9.9%	11.8x	0.8x	RENATA	56,247	1.7%	13.3	20.0x	1.6x
Food & Allied	14,418	14,234	+183.73	+1.29%	21	263,803	4.0%	674.3	14.5%	15.2x	4.2x	LHB	55,281	1.7%	33.4	15.4x	2.8x
IT	1,724	1,731	-6.89	-0.40%	11	22,740	0.3%	109.7	2.4%	19.1x	1.4x	UNILEVERCL	45,304	1.4%	41.3	77.9x	17.5x
Textile	1,010	1,008	+2.06	+0.20%	58	105,192	1.6%	536.4	11.5%	NM	0.7x	ICB	39,894	1.2%	9.2	NM	0.9x
Paper & Printing	3,959	3,979	-20.08	-0.50%	6	17,885	0.3%	127.7	2.7%	NM	0.8x	DUTCHBANGL	38,861	1.2%	3.4	8.9x	0.7x
Tannery	1,878	1,871	+7.31	+0.39%	6	20,926	0.3%	83.5	1.8%	64.3x	1.5x	BXPBARMA	38,856	1.2%	18.7	6.1x	0.8x
Jute	10,763	10,865	-102.01	-0.94%	3	2,369	0.0%	21.1	0.5%	NM	NM	EBL	36,385	1.1%	16.7	5.4x	0.7x
Ceramics	373	373	+0.50	+0.13%	5	16,745	0.3%	79.1	1.7%	NM	1.1x	PUBALIBANK	32,666	1.0%	5.0	4.2x	0.6x
Miscellaneous	4,120	4,118	+1.55	+0.04%	15	223,727	3.4%	152.1	3.3%	88.1x	1.8x	OLYMPIC	30,431	0.9%	15.7	16.5x	2.5x
Corporate Bond**	14,955	14,942	+12.66	+0.08%	16	33,017	0.5%	0.6	0.0%	NM	NM	CITYBANK	29,968	0.9%	36.0	3.0x	0.6x
Treasury Bond**	2,053	2,036	+17.08	+0.84%	236	3,289,694	49.7%	6.1	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
ISLAMIBANK	36.9	+9.8%	38.8	12.7x	0.8x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	BRACBANK	50.3	-1.6%	370.4	7.4x	1.2x
HRTEX	27.0	+9.8%	45.4	NM	9.1x	ISLAMIBANK	74,730	5.3%	12.7x	0.8x	BEACHHATCH	47.6	+2.8%	177.7	10.1x	2.9x
DESHBANDHU	18.1	+9.7%	34.0	NM	1.1x	BEXIMCO	69,463	4.9%	NM	1.3x	SQURPHARMA	209.1	-0.5%	174.1	7.9x	1.4x
CENTRALINS	39.9	+8.7%	47.2	22.9x	0.8x	BATBC	50,233	3.6%	9.3x	2.9x	LOVELLO	104.0	-1.3%	174.0	46.9x	8.2x
DBH1STMF	5.1	+8.5%	18.2	NM	0.6x	WALTONHIL	46,773	3.3%	9.7x	1.1x	SEAPEARL	53.8	-2.0%	82.0	NM	3.2x
NFML	10.8	+6.93%	1.3	NM	1.0x	BRACBANK	46,489	3.3%	7.4x	1.2x	LEGACYFOOT	60.3	+2.9%	68.2	NM	5.5x
ABBANK	6.3	+6.8%	14.8	NM	1x	GP	44,708	3.2%	14.0x	5.8x	DSSL	10.4	+5.1%	66.2	35.9x	0.6x
PHENIXINS	24.7	+6.5%	2.0	17.4x	0.7x	RENATA	32,968	2.3%	20.0x	1.6x	BATBC	285.2	+1.7%	64.9	9.3x	2.9x
MIDASFIN	6.8	+6.2%	0.3	NM	2.1x	BXPHARMA	23,409	1.7%	6.1x	0.8x	BSC	90.7	+0.2%	62.3	4.6x	0.9x
SHURWID	7.0	+6.1%	1.6	NM	0.5x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	ASIATICLAB	37.0	-1.6%	62.0	15.3x	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.0x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACFL	14.7	-5.2%	1.0	NM	0.4x	LHB	20,953	1.5%	15.4x	2.8x	LOVELLO	108.0	96.6	15.0	451	46.19
NEWLINE	7.1	-4.1%	10.5	NM	0x	OLYMPIC	20,496	1.5%	16.5x	2.5x	NBL	3.4	3.1	4.0	13,850	45.04
YPL	13.1	-3.7%	3.8	NM	2.4x	ALARABANK	18,282	1.3%	34.9x	0.8x	BRACBANK	51.0	46.3	2.0	575	29.21
WMSHIPYARD	8.2	-3.5%	2.0	NM	0.5x	BEACONPHAR	17,838	1.3%	28.2x	3.8x	ABBANK	6.4	6.4	2.0	4,000	25.60
SAMATALETH	55.4	-3.5%	6.0	NM	3.9x	PRIMEBANK	16,142	1.1%	3.3x	0.7x	FINEFOODS	234.3	234.0	11.0	105	24.58
BDLAMPs	117.8	-3.3%	1.4	NM	2.7x	ROBI	14,876	1.1%	18.0x	1.9x	RENATA	489.6	489.6	1.0	50	24.48
RAHIMTEXT	113.1	-3.3%	2.0	94.3x	4.5x	UTTARABANK	13,699	1.0%	NM	0.6x	AL-HAJTEX	130.0	122.0	10.0	117	14.48
GIB	3.0	-3.2%	2.2	5.7x	NM	NBL	13,055	0.9%	NM	7.6x	SEMLLECMF	11.2	10.5	5.0	1,350	14.38
STYLECRAFT	60.2	-3.2%	17.7	NM	10.4x	BSRMLTD	12,852	0.9%	4.4x	0.5x	PIONEERINS	42.5	42.5	3.0	250	10.63
BEACONPHAR	104.7	-3.1%	6.1	28.2x	3.8x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only. ** 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										

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

** 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
LOVELLO	108.0	96.6	46.2	451	15
NBL	3.4	3.1	45.0	13,850	4
BRACBANK	51.0	46.3	29.2	575	2
ABBANK	6.4	6.4	25.6	4,000	2
FINEFOODS	234.3	234.0	24.6	105	11
RENATA	489.6	489.6	24.5	50	1
AL-HAJTEX	130.0	122.0	14.5	117	10
SEMLLECMF	11.2	10.5	14.4	1,350	5
PIONEERINS	42.5	42.5	10.6	250	3
IFIC	5.5	5.5	6.3	1,151	1
REPUBLIC	29.3	29.3	4.3	147	1
NEWLINE	8.1	8.1	3.9	480	2
PREMIERCEM	50.6	49.0	3.6	71	5
DBH	34.4	34.4	3.4	100	1
TECHNODRUG	30.5	30.5	3.1	101	1
SONALILIFE	51.0	51.0	2.0	40	1
EIL	48.3	48.3	2.0	41	1
EHL	71.0	71.0	1.9	27	1
AMANFEED	24.0	24.0	1.9	80	1
SHEPHERD	17.5	17.5	1.8	100	1
ONEBANKPLC	7.0	7.0	1.6	228	1
SIMTEX	16.4	16.2	1.4	86	2
Total			283.3		87

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SICL		0.0%	5.0%	Record Date	26-Jun-25
PHOENIXFIN		0.0%	0.0%	Record Date	26-Jun-25
SBACBANK		0.0%	0.0%	Record Date	26-Jun-25
NRBCBANK		0.0%	0.0%	Record Date	26-Jun-25
ABBANK		0.0%	0.0%	Record Date	26-Jun-25
PURABIGEN		0.0%	10.0%	Record Date	29-Jun-25
ALARABANK		0.0%	0.0%	Record Date	29-Jun-25
STANDBANKL		0.0%	0.0%	Record Date	29-Jun-25
MERCANBANK		0.0%	0.0%	Record Date	29-Jun-25
UCB		0.0%	0.0%	Record Date	29-Jun-25
DELTALIFE		0.0%	30.0%	Record Date	30-Jun-25
PREMIERBAN		0.0%	0.0%	Record Date	3-Jul-25
EXIMBANK		0.0%	0.0%	Record Date	10-Jul-25
DHAKAINS		0.0%	10.0%	Record Date	10-Jul-25
UNIONINS		0.0%	10.0%	Record Date	15-Jul-25

Important DSE News
POPULARLIF

The Board of Directors has recommended 20% Cash Dividend for the year ended December 31, 2024. Date of AGM: 23.09.2025, Time: 12:00 PM, Venue: Digital Platform through the link- <https://pplcl.bdvirtualagm.com>. Record Date: 29.07.2025.

The company has informed that NOCFPS was Tk. 37.48 for January-March 2025 as against Tk. 33.88 for January-March 2024. The company has also informed that it was not possible to provide figures of NAV per share and Earnings Per Share as audited financials and actuarial valuation are done once in a year.

BAYLEASING

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 28.08.2025, Time: 11:30 AM, Venue/ Mode: Hybrid System (The Institution of Engineers Bangladesh (IEB), Conference Room (2nd floor) Ramna, Dhaka. Record Date: 21.07.2025. The Company has also reported Consolidated EPS of Tk. (31.16), Consolidated NAV per share of Tk. (25.20) and Consolidated NOCFPS of Tk. 0.48 for the year ended December 31, 2024 as against Tk. (5.88), Tk. 6.01 and Tk. (2.64) respectively for the year ended December 31, 2023.

BIFC

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date, Time and Venue of AGM: To be notified later. Record Date: 15.07.2025. The Company has also reported EPS of Tk. (6.66), NAV per share of Tk. (126.11) and NOCFPS of Tk. (0.01) for the year ended December 31, 2024 as against Tk. (5.66), Tk. (119.45) and Tk. (0.78) respectively for the year ended December 31, 2023.

(Q1 Un-audited): EPS was Tk. (1.65) for January-March 2025 as against Tk. (0.94) for January-March 2024. NOCFPS was Tk. (0.06) for January-March 2025 as against Tk. (0.06) for January-March 2024. NAV per share was Tk. (127.76) as on March 31, 2025 and Tk. (120.39) as on March 31, 2024.

OLYMPIC

The Board of Directors of the company has decided to purchase the following 4 lands for undertaking construction to accommodate future expansions: Decision taken to purchase total 460.00 decimals land under Mouza: Biti Bagun, Police Station: Kaligonj and District: Gazipur in the name of Olympic Industries Limited at an agreed total price of Tk. 13,70,00,000.00 from SEAM AGRO FOODS LIMITED (Represented by its Chairman Mr. Nasir Mohammed Helal,) House No.: 18, Road No.: 3, Sector 10, Uttara, Dhaka. Decision taken to purchase total 208.50 decimals land near under Mouza: Biti Bagun, Police Station: Kaligonj and District: Gazipur in the name of Olympic Industries Limited at an agreed total price of Tk. 6,30,00,000.00 (Taka six crore thirty lac) 1) Mst. Tanjur Akter, 2) Mr. Nasir Mohammed Helal, 3) Mr. Ahmed Mohammad Helal, 4) Mrs. Nasima Mohammad Helal and 5) Mrs. Joynob Mohammad Helal, all are Bangladeshi Nationals. Decision taken to purchase total 25.83 decimals land near Lolati Factory of the company under Mouza: Lolati, Union: Kanchpur, P.S.: Sonargaron, District: Narayanganj in the name of Olympic Industries Limited at an agreed total price of Tk. 90,40,500.00 (Taka ninety lac forty thousand five hundred) i.e.@Tk.3,50,000.00 per decimal. from Mr. Abdur Rahman and Mrs. Umma Salma, Sonargaon, Narayanganj. Decision taken to purchase total 7.75 decimals land near Lolati Factory of the company under Mouza: Lolati, Union: Kanchpur, P.S.: Sonargaron, District: Narayanganj in the name of Olympic Industries Limited at an agreed total price of Tk. 27,12,500.00 (Taka twenty seven lac twelve thousand five hundred) i.e.@Tk.3,50,000.00 per decimal from Mst. Minu Begum, Sonargaon, Narayanganj. The purchaser, Olympic Industries Limited shall also bear the total registration costs inclusive of VAT, Tax and other Charges.

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TITASGAS

The company has informed that the Board of Directors of the Company has taken the following decisions:
Preference Share: Company will convert its share money deposit amount of Taka 282,74,74,695.00 to number of Non-Cumulative Preference Shares 28,27,47,469.00 in favor of the Government (Finance Division, Ministry of Finance) of which Face Value and Issue Price both is Taka 10.00 each.

MPETROLEUM

The Company has informed that Mr. Mohammad Ahsanul Amin has joined as the Company Secretary of the company.

AZIZPIPES

The company has informed that Mr. Md. Mokbul Hossain has been appointed as the Company Secretary (Current Charge) of the company.

PTL

The company has informed that the Board has taken Decision for issuance of non-convertible, transferable, fully redeemable, unsecured zero-coupon bond BDT 3,300 million in face value, and decision for raising BDT 3,000,000,000 (Three Billion) investment as non-convertible redeemable preference share of Paramount Textile PLC. For details, please visit the following link: <https://www.dsebd.org/Annexure/2025/Extract-of-BoD-Meeting-of-PTL-PSI2025.pdf>

PIONEERINS

Mr. A.K.M. Rahmatullah, a shareholder Director of the company, has further informed that he has completed his transfer of 533,333 shares of the company to his daughter Mrs. Shahana Rahmatullah by way of gift outside the trading system of the Exchange as per declaration disseminated by DSE on 19.06.2025.

NCCBANK

Mrs. Sohela Hossain, a Sponsor of the Company, has further informed that she has completed her sale of 1,11,04,231 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated by DSE on 17.06.2025.

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