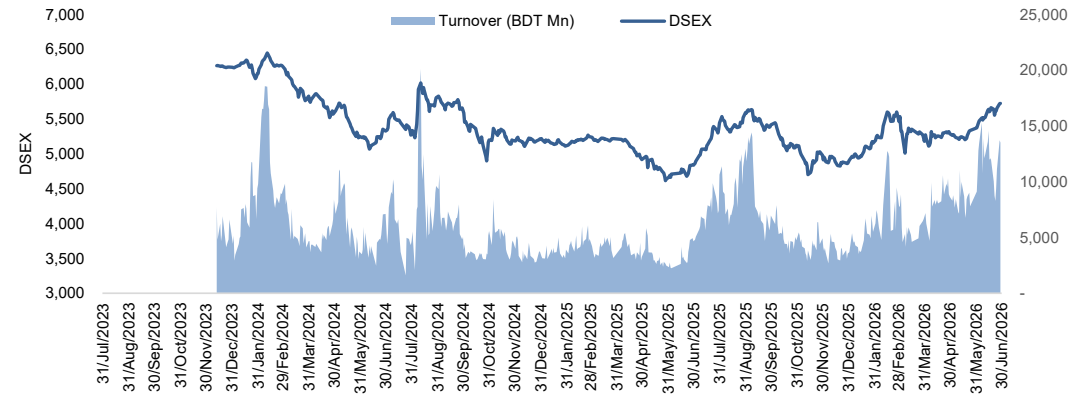


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.05%) gained 2.78 points and closed at 5,722.54. The blue-chip index DS30 (+0.18%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (-0.07%) closed at 2,166.46, 1,156.73, and 1,141.72 points, respectively. Most of the large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.37%, followed by NBF1 (+0.20%), Telecommunication (+0.18%), Engineering (+0.07%), Bank (-0.23%), Pharmaceutical (-0.26%), and Food & Allied (-0.37%), respectively. Block trades contributed 5.5% of the overall market turnover. Bangladesh Export Import Company Ltd. (-1.6%) was the most traded share with a turnover of BDT 725 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,722.54	5,719.76	+2.78	+0.05%	+17.6%
DS30	2,166.46	2,162.57	+3.89	+0.18%	+16.9%
DSES	1,156.73	1,156.96	-0.23	-0.02%	+15.6%
CDSET	1,141.72	1,142.56	-0.84	-0.07%	+13.6%

	Advanced	Declined	Unchanged	Total
All Category	178	158	63	399
A Category (Equity)	100	65	39	204
B Category (Equity)	30	44	1	75
N Category (Equity)	0	0	0	0
Z Category (Equity)	48	49	23	120
Mutual Funds	7	7	20	34
Corporate Bonds	3	1	1	5
Treasury Bonds	6	1	0	7

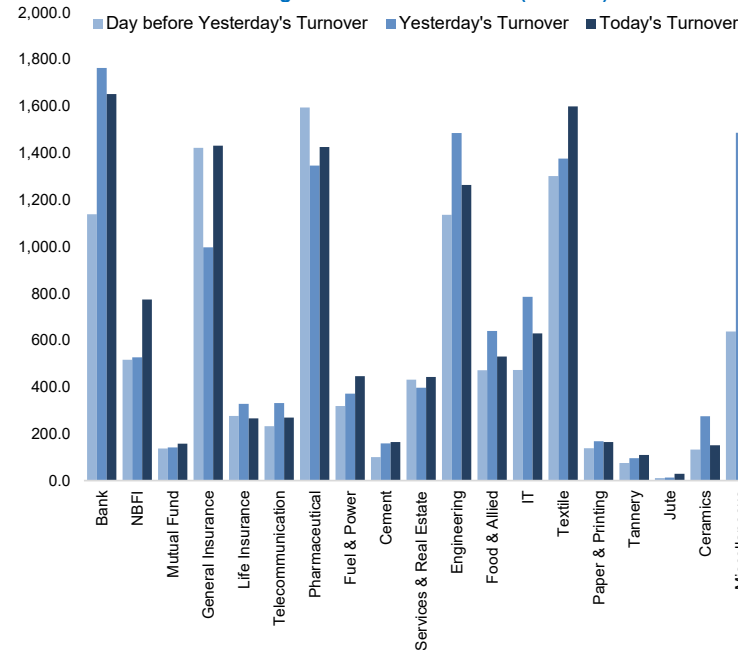
\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,976,834	6,968,094	+0.1%
	Mn USD	56,651	56,580	
Turnover	Mn BDT	13,515	13,710	
	Mn USD	110	111	-1.4%
Volume	Mn Shares	404	447	-9.6%
	No. of Trade	297,770	285,232	+4.4%

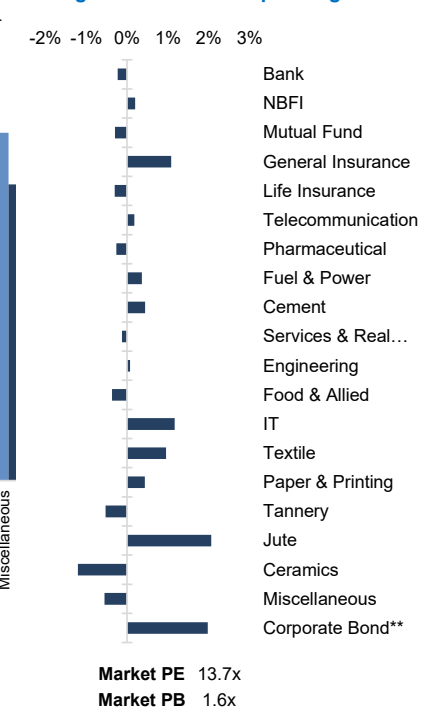
\* Average Interbank Exchange Rate is BDT 123.16 as of Jun 28, 2026

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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	1,568	1,571	-3.54	-0.23%	36	747,077	10.7%	1,651.3	12.9%	7.0x	0.7x	GP	351,753	9.7%	82.5	11.8x	5.6x
NBFI	1,142	1,140	+2.28	+0.20%	23	108,579	1.6%	773.9	6.1%	NM	1.2x	SQRPHARMA	199,363	5.5%	208.4	7.7x	1.3x
Mutual Fund	546	548	-1.59	-0.29%	36	26,320	0.4%	158.0	1.2%	NM	0.5x	ROBI	171,804	4.8%	129.8	16.5x	2.4x
General Insurance	4,247	4,202	+45.51	+1.08%	43	120,005	1.7%	1,431.3	11.2%	19.3x	1.7x	BRACBANK	151,798	4.2%	426.9	7.6x	1.4x
Life Insurance	1,923	1,929	-5.81	-0.30%	15	54,217	0.8%	265.5	2.1%	NM	NM	WALTONHIL	130,023	3.6%	26.6	12.9x	1.1x
Telecommunication	4,758	4,749	+8.57	+0.18%	3	552,081	7.9%	269.7	2.1%	12.9x	3.6x	BATBC	119,016	3.3%	51.4	25.0x	2.1x
Pharmaceutical	3,187	3,195	-8.29	-0.26%	34	601,520	8.6%	1,425.4	11.2%	10.9x	1.5x	MARICO	86,981	2.4%	45.0	7.6x	30.0x
Fuel & Power	1,143	1,139	+4.16	+0.37%	23	301,664	4.3%	445.7	3.5%	9.7x	0.6x	UPGDCL	72,404	2.0%	10.1	7.8x	1.5x
Cement	2,112	2,102	+9.31	+0.44%	7	99,353	1.4%	165.2	1.3%	23.0x	2.2x	BERGERPBL	70,231	1.9%	19.7	18.9x	3.6x
Services & Real Estate	1,157	1,159	-1.43	-0.12%	9	62,981	0.9%	442.3	3.5%	22.4x	0.5x	LHB	63,992	1.8%	84.8	13.2x	3.2x
Engineering	2,686	2,684	+1.97	+0.07%	42	301,099	4.3%	1,263.7	9.9%	17.4x	0.9x	PUBALIBANK	57,784	1.6%	9.6	5.1x	0.8x
Food & Allied	12,578	12,624	-46.23	-0.37%	21	229,618	3.3%	530.0	4.1%	38.7x	3.5x	CITYBANK	55,806	1.5%	254.8	3.8x	0.8x
IT	2,509	2,480	+28.95	+1.17%	11	33,223	0.5%	628.5	4.9%	37.5x	2.0x	RENATA	51,763	1.4%	42.1	19.0x	1.4x
Textile	1,323	1,310	+12.50	+0.95%	58	137,605	2.0%	1,599.0	12.5%	NM	0.9x	ISLAMIBANK	50,393	1.4%	14.4	NM	0.7x
Paper & Printing	4,815	4,794	+21.04	+0.44%	6	22,554	0.3%	164.4	1.3%	NM	1.5x	DUTCHBANGL	44,966	1.2%	25.8	4.0x	0.7x
Tannery	2,118	2,129	-11.21	-0.53%	6	24,592	0.4%	109.6	0.9%	NM	1.5x	EBL	40,763	1.1%	144.2	4.8x	0.8x
Jute	12,392	12,142	+250.13	+2.06%	3	2,703	0.0%	29.7	0.2%	NM	1.7x	UNILEVERCL	40,202	1.1%	2.0	51.7x	17.0x
Ceramics	491	497	-5.98	-1.20%	5	22,175	0.3%	150.9	1.2%	NM	1.5x	ICB	40,067	1.1%	16.3	NM	1.5x
Miscellaneous	2,637	2,652	-14.56	-0.55%	15	143,197	2.1%	1,265.4	9.9%	56.4x	1.1x	PRIMEBANK	36,559	1.0%	78.1	4.0x	0.8x
Corporate Bond**	18,454	18,097	+357.54	+1.98%	16	40,829	0.6%	1.8	0.0%	NM	NM	POWERGRID	36,187	1.0%	7.7	8.9x	0.3x
Treasury Bond**	2,181	2,176	+4.97	+0.23%	232	3,349,642	48.0%	5.3	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
RAHIMTEXT	225.3	+8.7%	48.0	88.0x	8.2x	SQRPHARMA	111,344	7.3%	7.7x	1.3x	BEXIMCO	30.7	-1.6%	724.8	NM	0.4x
FASFIN	1.3	+8.3%	0.7	NM	NM	BRACBANK	81,713	5.4%	7.6x	1.4x	IPDC	32.5	+6.6%	623.1	28.8x	1.9x
JMISMDL	146.0	+7.4%	24.4	NM	1.8x	ISLAMIBANK	50,302	3.3%	NM	0.7x	BRACBANK	66.3	-0.6%	426.9	7.6x	1.4x
IPDC	32.5	+6.6%	623.1	28.8x	1.9x	BXPBARMA	44,043	2.9%	7.3x	1.0x	NCCBANK	16.0	-0.6%	301.9	3.2x	0.6x
CAPMIBBLMF	10.3	+6.2%	19.3	NM	0.9x	WALTONHIL	42,791	2.8%	12.9x	1.1x	MALEKSPIN	34.0	+5.6%	298.0	6.0x	0.5x
IBP	17.6	+6.02%	174.5	NM	1.4x	PUBALIBANK	39,368	2.6%	5.1x	0.8x	BDTHAI	20.7	-5.5%	288.8	NM	0.8x
TAMIJTEX	136.9	+5.7%	59.0	21.8x	1x	CITYBANK	38,858	2.6%	3.8x	0.8x	RELIANCINS	117.7	+2.0%	278.0	13.0x	1.4x
MALEKSPIN	34.0	+5.6%	298.0	6.0x	0.5x	GP	35,175	2.3%	11.8x	5.6x	BXPBARMA	141.3	-0.7%	275.2	7.3x	1.0x
CROWNCEMNT	64.7	+5.5%	16.1	24.2x	1.0x	BATBC	31,480	2.1%	25.0x	2.1x	ITC	47.9	+1.7%	263.5	14.4x	1.9x
SUNLIFEINS	73.7	+5.1%	88.8	NM	NM	EBL	27,947	1.8%	4.8x	0.8x	CITYBANK	31.9	+2.9%	254.8	3.8x	0.8x

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)
PLFSL	1.2	-7.7%	1.3	NM	NM	CITYGENINS	106.6	96.0	5.0	1,331	137.39
BDTHAI	20.7	-5.5%	288.8	NM	1x	DOMINAGE	80.1	74.0	10.0	1,175	90.36
SSSTEEL	6.7	-3.8%	4.7	NM	0.2x	FINEFOODS	512.0	480.0	8.0	173	87.90
FAMILYTEX	2.5	-3.8%	4.7	NM	0.2x	ENVOYTEX	54.5	54.5	1.0	1,347	73.42
SAIFPOWER	10.8	-3.6%	24.2	30.9x	0.6x	GQBALLPEN	660.0	580.0	10.0	79	48.68
NURANI	2.9	-3.3%	0.2	NM	0.3x	SIPLC	103.0	100.0	3.0	373	37.60
EBLNRBMF	3.0	-3.2%	1.7	NM	0.3x	BRACBANK	73.3	70.0	3.0	299	21.23
FBFIF	3.0	-3.2%	1.4	NM	0.3x	BNICL	124.0	124.0	1.0	150	18.60
ICBPMF1S1	6.2	-3.1%	7.7	NM	0.5x	ORIONINFU	324.5	324.5	1.0	50	16.23
TRUSTB1MF	3.1	-3.1%	2.3	NM	0.3x	NCCBANK	17.7	16.5	5.0	931	15.55

\* 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	106.6	96.0	137.4	1,331	5
DOMINAGE	80.1	74.0	90.4	1,175	10
FINEFOODS	512.0	480.0	87.9	173	8
ENVOYTEX	54.5	54.5	73.4	1,347	1
GQBALLPEN	660.0	580.0	48.7	79	10
SIPLC	103.0	100.0	37.6	373	3
BRACBANK	73.3	70.0	21.2	299	3
BNICL	124.0	124.0	18.6	150	1
ORIONINFU	324.5	324.5	16.2	50	1
NCCBANK	17.7	16.5	15.6	931	5
CITYBANK	31.9	27.9	13.2	417	3
PEOPLESINS	61.6	61.6	11.9	193	1
LHB	60.0	60.0	11.7	195	1
JAMUNABANK	23.0	23.0	11.5	500	1
SHASHADNIM	24.2	23.6	11.0	461	4
SHAHJABANK	16.0	16.0	10.6	663	1
TAKAFULINS	39.5	39.5	9.4	238	2
SHYAMPSUG	227.5	210.0	7.5	34	9
ICICL	29.0	29.0	7.0	240	2
PTL	72.5	62.5	6.8	108	2
MERCINS	39.1	39.1	5.9	151	1
PRIMEINSUR	42.5	42.4	5.9	138	6
<b>Total</b>			<b>738.6</b>		<b>129</b>

**Important DSE News**

**FIRSTFIN**

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 17.09.2026, Time: 3:00 PM, Venue: Hybrid system meeting by using digital platform and physical presence. Physical meeting will be held at Trading Corporation of Bangladesh (TCB) Auditorium, 1 Karwanbazar (1st Floor), Dhaka-1215. Record Date: 22.07.2026. The Company has also reported EPS of Tk. (6.66), NAV per share of Tk. (46.01) and NOCFPS of Tk. (0.74) for the year ended December 31, 2025 as against Tk. (5.88), Tk. (37.86) and Tk. (0.69) respectively for the year ended December 31, 2024.

EPS was Tk. (1.87) for January-March 2026 as against Tk. (1.27) for January-March 2025. NOCFPS was Tk. (0.06) for January-March 2026 as against Tk. (0.09) for January-March 2025. NAV per share was Tk. (47.88) as on March 31, 2026 and Tk. (39.13) as on March 31, 2025.

**MEGHNALIFE**

The Board of Directors has recommended 15% cash dividend for the year ended December 31, 2025. Date of AGM: 20.08.2026, Time: 11:00 AM, Venue/Mode: Digital Platform. Record Date: 23.07.2026. The Company has also reported NOCFPS of Tk. (4.19) for the year ended December 31, 2025 as against Tk. (13.71) for the year ended December 31, 2024.

As per consolidated life revenue account of the company for January to March, 2026, excess of total expenses including claims over total income (deficit) was BDT 459.13 million as against excess of total expenses including claims over total income (deficit) of BDT 781.01 million in the corresponding previous period of 2025. Balance of Life Insurance Fund was BDT 15,275.99 million as on March 31, 2026 as against BDT 15,273.01 million as on March 31, 2025 resulting a net increase of BDT 2.98 million. NOCFPS was Tk. (12.78) as on March 31, 2026 and Tk. (10.39) as on March 31, 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
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
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
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	2-Aug-26
ISLAMICFIN		0.0%	0.0%	Record Date	9-Aug-26

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