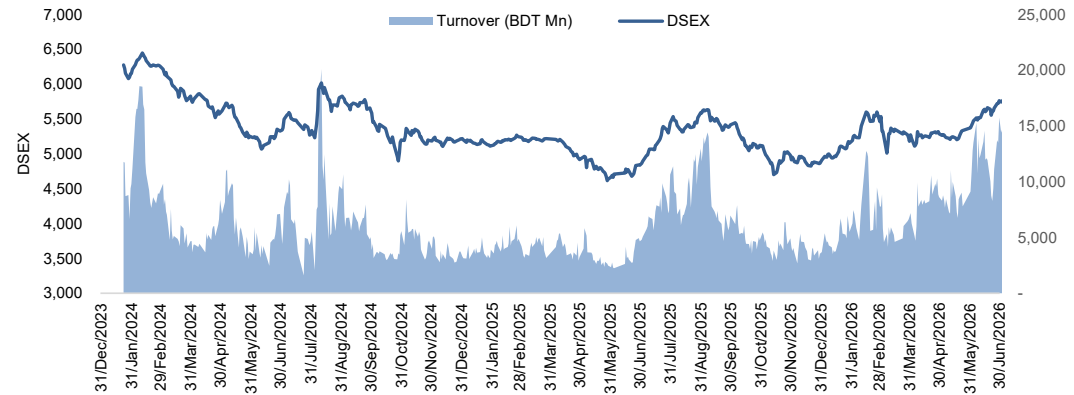


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.56%) lost 33.17 points and closed at 5,860.96. The blue-chip index DS30 (-0.45%), the Shariah-based index DSES (-0.44%), and the large-cap index CDSET (-0.49%) closed at 2,191.85, 1,180.71, and 1,148.75 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.57% followed by Engineering (-0.63%), Bank (-0.60%), Fuel & Power (-0.55%), NBFI (-0.53%), Pharmaceutical (-0.25%), and Telecommunication (-0.10%), respectively. Block trades contributed 5.3% of the overall market turnover. Sharp Industries PLC (-6.0%) was the most traded share with a turnover of BDT 488 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,860.96	5,894.13	-33.17	-0.56%	+20.5%
DS30	2,191.85	2,201.75	-9.90	-0.45%	+18.3%
DSES	1,180.71	1,185.98	-5.27	-0.44%	+18.0%
CDSET	1,148.75	1,154.35	-5.60	-0.49%	+14.3%

	Advanced	Declined	Unchanged	Total
All Category	88	263	41	392
A Category (Equity)	45	139	14	198
B Category (Equity)	18	52	4	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	25	72	23	120
Mutual Funds	2	30	2	34
Corporate Bonds	2	0	1	3
Treasury Bonds	0	3	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,079,147	7,104,492	-0.4%
	Mn USD	57,191	57,395	
Turnover	Mn BDT	11,477	11,115	+3.3%
	Mn USD	93	90	
Volume	Mn Shares	412	441	-6.5%
No. of Trade		274,233	268,395	+2.2%

* Average Interbank Exchange Rate is BDT 123.78 as of Aug 04, 2026

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Figure: Sectorial Turnover (BDT Mn)

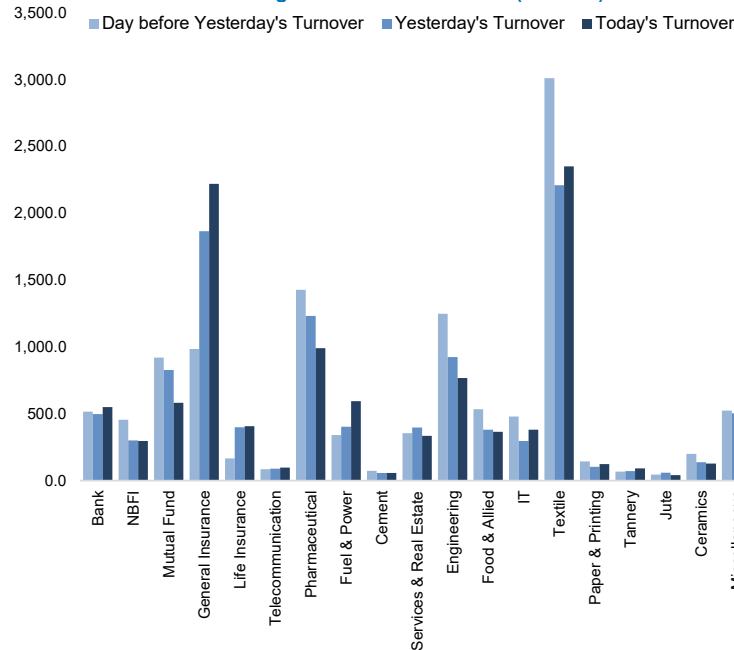
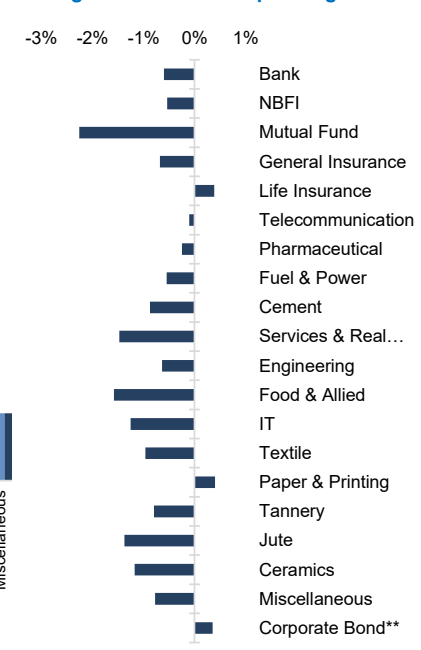


Figure: Sectorial Mcap Change



Market PE 13.8x

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	1,568	1,578	-9.39	-0.60%	36	747,456	10.6%	549.6	5.1%	7.3x	0.8x	GP	347,297	9.4%	37.3	9.8x	6.2x
NBFI	1,206	1,212	-6.45	-0.53%	23	114,688	1.6%	296.1	2.7%	NM	1.2x	SQURPHARMA	195,019	5.3%	41.3	7.5x	1.3x
Mutual Fund	726	742	-16.76	-2.26%	34	33,767	0.5%	581.8	5.4%	NM	0.6x	ROBI	166,566	4.5%	54.0	15.9x	2.5x
General Insurance	4,542	4,573	-30.93	-0.68%	43	128,323	1.8%	2,218.2	20.4%	19.0x	1.8x	BRACBANK	145,387	3.9%	64.1	6.4x	1.3x
Life Insurance	1,960	1,952	+7.60	+0.39%	15	55,240	0.8%	406.1	3.7%	NM	NM	WALTONHIL	130,556	3.5%	8.9	13.0x	1.1x
Telecommunication	4,680	4,685	-4.80	-0.10%	3	543,060	7.7%	96.6	0.9%	11.2x	3.9x	BATBC	130,140	3.5%	104.6	22.4x	2.2x
Pharmaceutical	3,201	3,209	-7.88	-0.25%	34	604,176	8.5%	990.7	9.1%	11.0x	1.5x	MARICO	85,696	2.3%	11.9	7.6x	18.6x
Fuel & Power	1,173	1,180	-6.45	-0.55%	23	309,762	4.4%	593.9	5.5%	10.0x	0.6x	BERGERPBL	72,377	2.0%	39.6	15.5x	3.4x
Cement	2,175	2,194	-19.08	-0.87%	7	102,347	1.4%	57.0	0.5%	23.7x	2.3x	UPGDCL	69,853	1.9%	17.6	7.5x	1.5x
Services & Real Estate	1,212	1,230	-18.09	-1.47%	9	65,936	0.9%	334.0	3.1%	26.8x	0.5x	LHB	67,476	1.8%	38.1	13.7x	3.6x
Engineering	2,783	2,801	-17.78	-0.63%	42	311,936	4.4%	767.0	7.1%	17.6x	0.9x	PUBALIBANK	59,970	1.6%	89.1	5.0x	0.8x
Food & Allied	13,136	13,346	-210.16	-1.57%	21	239,797	3.4%	365.0	3.4%	35.1x	3.6x	CITYBANK	55,106	1.5%	84.0	3.6x	0.8x
IT	2,648	2,682	-33.52	-1.25%	11	35,069	0.5%	380.4	3.5%	45.6x	2.1x	RENATA	54,183	1.5%	15.3	19.8x	1.5x
Textile	1,489	1,504	-14.46	-0.96%	58	154,901	2.2%	2,350.0	21.6%	NM	1.0x	DUTCHBANGL	49,534	1.3%	16.7	3.8x	0.8x
Paper & Printing	4,894	4,874	+19.65	+0.40%	6	22,922	0.3%	123.9	1.1%	NM	1.5x	ISLAMIBANK	48,783	1.3%	1.9	NM	0.8x
Tannery	2,221	2,239	-17.69	-0.79%	6	25,797	0.4%	90.7	0.8%	NM	1.6x	ICB	39,894	1.1%	4.4	NM	1.5x
Jute	13,737	13,928	-190.95	-1.37%	3	2,996	0.0%	41.3	0.4%	NM	1.9x	EBL	39,613	1.1%	52.1	4.4x	0.8x
Ceramics	503	509	-5.95	-1.17%	5	22,718	0.3%	128.0	1.2%	NM	1.5x	UNILEVERCL	39,350	1.1%	0.3	64.3x	24.1x
Miscellaneous	2,591	2,611	-20.12	-0.77%	15	140,674	2.0%	503.6	4.6%	40.3x	1.1x	POWERGRID	37,466	1.0%	2.6	9.3x	0.3x
Corporate Bond**	18,341	18,277	+64.63	+0.35%	16	40,579	0.6%	0.0	0.0%	NM	NM	PRIMEBANK	36,680	1.0%	12.3	4.0x	0.8x
Treasury Bond**	2,191	2,193	-2.57	-0.12%	232	3,365,145	47.6%	0.8	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
NITOLINS	42.7	+9.8%	72.3	21.0x	1.3x	SQURPHARMA	108,918	7.0%	7.5x	1.3x	SHARPIND	39.1	-6.0%	488.1	NM	4.9x
TUNGHAI	3.6	+9.1%	10.2	NM	NM	BRACBANK	78,262	5.0%	6.4x	1.3x	SIPLC	119.8	-7.9%	238.8	23.5x	3.9x
GBBPOWER	12.0	+9.1%	31.8	NM	0.6x	ISLAMIBANK	48,695	3.1%	NM	0.8x	ACMEPL	26.0	-1.1%	237.9	NM	1.7x
SAMATALETH	109.7	+7.8%	33.3	NM	7.6x	BXPHARMA	45,446	2.9%	7.5x	1.1x	SAPORTL	58.2	-2.3%	229.1	27.5x	1.6x
1STPRIMFMF	26.1	+4.8%	45.4	NM	2.7x	WALTONHIL	42,966	2.8%	13.0x	1.1x	MALEKSPIN	46.0	+1.5%	199.3	8.1x	0.7x
DHAKAINS	48.2	+4.33%	66.3	28.5x	1.3x	PUBALIBANK	40,858	2.6%	5.0x	0.8x	SAIHAMTEX	26.4	+2.3%	167.2	42.6x	0.6x
FAREASTFIN	2.5	+4.2%	8.9	NM	NM	CITYBANK	38,370	2.5%	3.6x	0.8x	BEXIMCO	23.5	+1.7%	162.9	NM	0.3x
BDAUTOCA	215.9	+4.0%	27.1	NM	29.2x	GP	34,730	2.2%	9.8x	6.2x	FEKDIL	25.8	-1.1%	155.7	NM	1.3x
FIRSTFIN	5.4	+3.8%	2.9	NM	NM	BATBC	34,422	2.2%	22.4x	2.2x	MONNOFABR	24.4	-	155.5	NM	1.0x
SONARGAON	108.9	+3.7%	130.7	NM	6.0x	EBL	27,159	1.7%	4.4x	0.8x	BPPL	21.7	+0.5%	148.1	6.2x	0.7x
						RENATA	26,392	1.7%	19.8x	1.5x						
						LHB	24,703	1.6%	13.7x	3.6x						
						PRIMEBANK	22,914	1.5%	4.0x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
						OLYMPIC	18,993	1.2%	16.0x	2.3x	BRACBANK	63.0	63.0	9.0	1,760	110.88
						UTTARABANK	17,862	1.1%	NM	0.8x	CITYGENINS	115.0	103.6	7.0	737	83.61
						ROBI	16,657	1.1%	15.9x	2.5x	DOMINAGE	82.5	77.0	18.0	892	70.76
						BSRMLTD	16,010	1.0%	4.7x	0.6x	IPDC	34.4	28.8	6.0	2,055	67.68
						ALARABANK	15,838	1.0%	20.8x	0.7x	SQURPHARMA	220.3	220.0	4.0	292	64.27
						BEACONPHAR	14,962	1.0%	17.1x	3.2x	ASIATICLAB	129.1	128.9	5.0	347	44.78
						BEXIMCO	14,827	1.0%	NM	0.3x	MARICO	2,700.0	2,700.0	1.0	10	27.00
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
SIPLC	119.8	-7.9%	238.8	23.5x	3.9x											
PREMIERLEA	2.9	-6.5%	2.9	NM	NM											
SHARPIND	39.1	-5.9%	2.6	40.0x	NM											
CNATEX	3.2	-5.9%	2.6	40.0x	NM											
QUEENSOUTH	18.8	-5.5%	115.4	NM	1.2x											
ICBSONALI1	7.3	-5.2%	30.4	NM	0.6x											
ARGONDENIM	23.8	-4.4%	125.1	20.7x	1.0x											
AIBL1STIMF	6.5	-4.4%	22.7	NM	0.7x											
NEWLINE	6.8	-4.2%	7.0	NM	0.3x											
ICBAGRANI1	9.1	-4.2%	13.6	NM	0.7x											

*. 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
BRACBANK	63.0	63.0	110.9	1,760	9
CITYGENINS	115.0	103.6	83.6	737	7
DOMINAGE	82.5	77.0	70.8	892	18
IPDC	34.4	28.8	67.7	2,055	6
SQURPHARMA	220.3	220.0	64.3	292	4
ASIATICLAB	129.1	128.9	44.8	347	5
MARICO	2,700.0	2,700.0	27.0	10	1
DAFODILCOM	161.3	160.0	21.6	135	6
KARNAPHULI	50.4	50.4	20.2	400	2
ACIFORMULA	184.5	180.0	9.9	54	2
MALEKSPIN	45.5	45.5	9.1	200	1
MLDYEING	18.0	18.0	7.2	400	1
GQBALLPEN	530.0	530.0	6.5	12	1
BNICL	119.0	119.0	6.2	52	1
ETL	15.2	13.0	5.9	446	4
FEKDIL	28.7	28.7	5.5	193	4
SIPLC	117.9	117.9	4.0	34	1
SAIHAMTEX	26.0	26.0	3.6	140	1
ISLAMIINS	67.5	61.0	3.2	51	3
PEOPLESINS	71.0	65.0	2.5	36	3
FINEFOODS	435.0	435.0	2.5	6	2
SONARGAON	96.5	96.5	2.4	25	1
Total			602.6		107

Important DSE News

NFML

(Q2 Un-audited): EPS was Tk. (0.03) for October-December 2025 as against Tk. 0.14 for October-December 2024; EPS was Tk. (0.11) for July-December 2025 as against Tk. (0.10) for July-December 2024. NOCFPS was Tk. 0.01 for July-December 2025 as against Tk. 0.05 for July-December 2024. NAV per share was Tk. 10.98 as on December 31, 2025 and Tk. 11.09 as on June 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PREMIERLEA		0.0%	0.0%	Record Date	23-Aug-26
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26

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