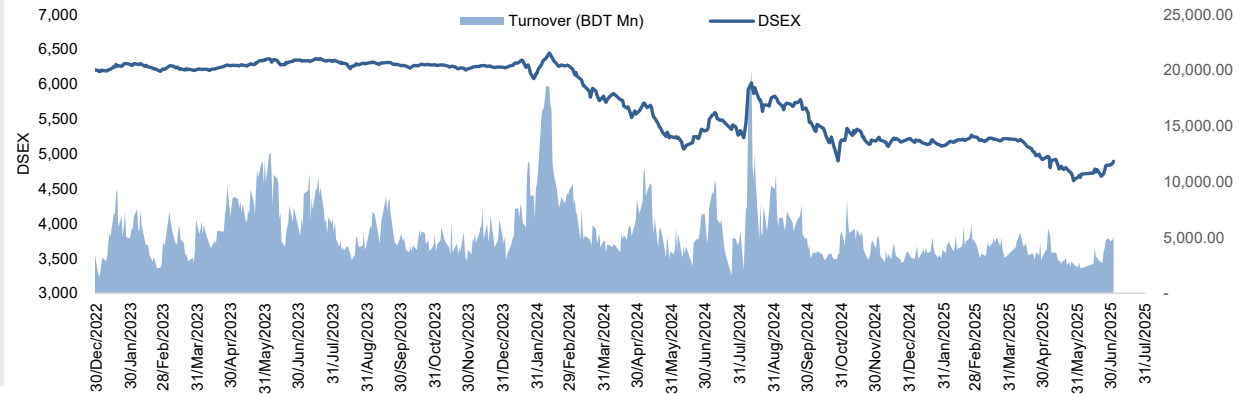


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.59%) gained 28.74 points and closed at 4,894.07. The blue-chip index DS30 (+1.01%), the Shariah-based index DSES (-0.04%), and the large-cap index CDSET (+0.81%) closed at 1,836.12, 1,065.39, and 1,002.34 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 2.80%, followed by NBF1 (+1.78%), Engineering (+0.54%), Fuel & Power (+0.17%), Pharmaceutical (-0.01%), Telecommunication (-0.42%), and Food & Allied (-0.62%), respectively. Block trades contributed 3.3% of the overall market turnover. BRAC Bank Ltd. (+5.1%) was the most traded share with a turnover of BDT 249 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,894.07	4,865.33	+28.74	+0.59%	-6.2%
DS30	1,836.12	1,817.70	+18.42	+1.01%	-5.3%
DSES	1,065.39	1,065.79	-0.40	-0.04%	-8.9%
CDSET	1,002.34	994.27	+8.07	+0.81%	-6.0%

	Advanced	Declined	Unchanged	Total
All Category	154	181	62	397
A Category (Equity)	93	103	21	217
B Category (Equity)	32	39	12	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	39	29	97
Mutual Funds	22	5	9	36
Corporate Bonds	0	2	0	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,660,061	6,664,036	-0.1%
	Mn USD	54,265	54,298	
Turnover	Mn BDT	5,062	4,795	+5.6%
	Mn USD	41	39	
Volume	Mn Shares	231	209	+10.2%
No. of Trade		159,410	158,466	+0.6%

* Average Interbank Exchange Rate is BDT 122.73 as of Jul 03, 2025

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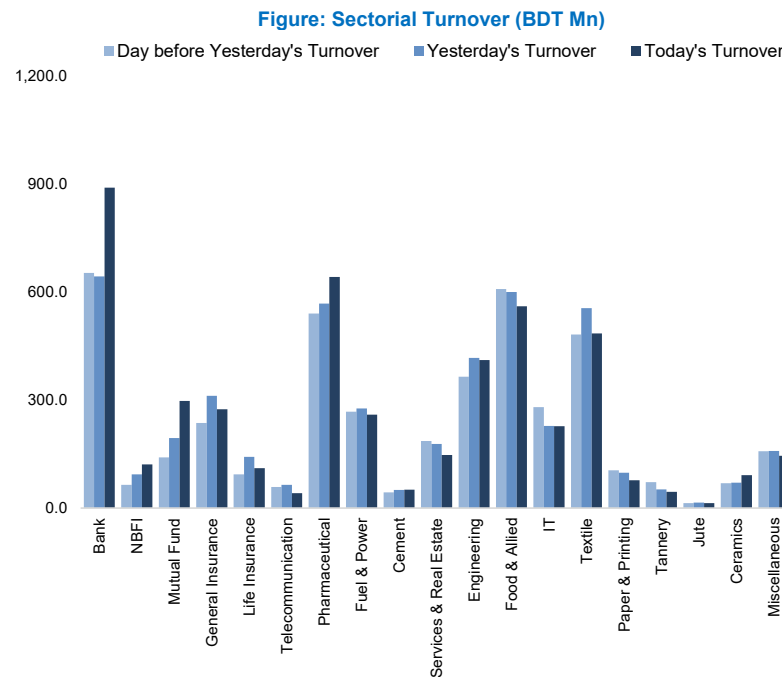
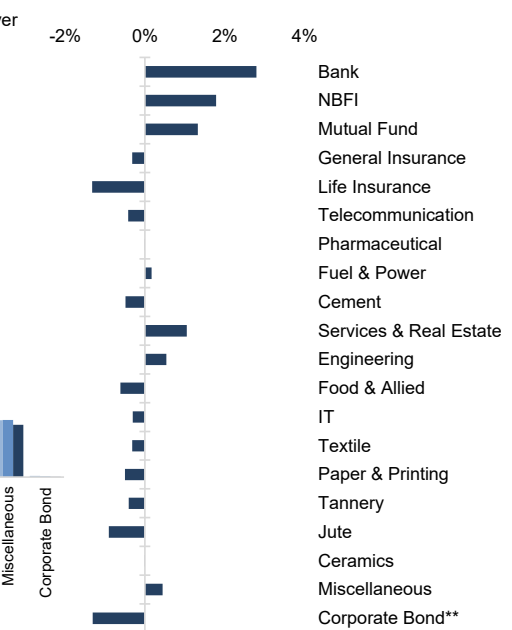


Figure: Sectorial Mcap Change



Market PE 13.3x

Market PB 1.1x

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

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	1,391	1,354	+37.85	+2.80%	36	658,348	9.9%	889.8	18.2%	19.1x	0.7x	GP	403,740	12.1%	17.4	13.8x	5.7x
NBFI	970	953	+17.00	+1.78%	23	92,471	1.4%	121.5	2.5%	NM	NM	SQURPHARMA	184,027	5.5%	122.7	7.8x	1.4x
Mutual Fund	631	622	+8.28	+1.33%	37	28,985	0.4%	297.2	6.1%	NM	0.6x	BATBC	151,686	4.5%	19.0	9.2x	2.9x
General Insurance	2,490	2,498	-7.98	-0.32%	43	71,073	1.1%	274.3	5.6%	11.9x	1.1x	ROBI	128,853	3.9%	21.3	17.8x	1.8x
Life Insurance	1,557	1,578	-20.88	-1.32%	15	41,407	0.6%	110.5	2.3%	NM	NM	WALTONHIL	124,625	3.7%	3.1	9.7x	1.1x
Telecommunication	4,736	4,755	-19.78	-0.42%	3	555,281	8.3%	41.4	0.8%	14.7x	3.5x	BRACBANK	107,112	3.2%	248.8	7.9x	1.3x
Pharmaceutical	2,791	2,792	-0.40	-0.01%	34	529,168	7.9%	642.1	13.1%	12.2x	1.4x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,078	1,076	+1.78	+0.17%	23	285,630	4.3%	259.2	5.3%	18.0x	0.6x	MARICO	77,465	2.3%	2.9	13.1x	10.3x
Cement	1,783	1,792	-8.69	-0.48%	7	84,994	1.3%	51.4	1.0%	20.3x	1.8x	BERGERPBL	75,604	2.3%	14.1	21.2x	4.6x
Services & Real Estate	935	925	+9.69	+1.05%	9	51,430	0.8%	147.6	3.0%	23.7x	0.4x	ISLAMIBANK	71,001	2.1%	80.0	15.2x	1.0x
Engineering	2,293	2,280	+12.35	+0.54%	42	258,620	3.9%	410.9	8.4%	11.9x	0.8x	RENATA	55,800	1.7%	3.8	19.8x	1.6x
Food & Allied	14,359	14,448	-89.09	-0.62%	21	262,735	3.9%	560.5	11.5%	15.2x	4.2x	LHB	54,352	1.6%	30.1	15.1x	2.7x
IT	1,731	1,737	-5.26	-0.30%	11	22,836	0.3%	227.2	4.6%	19.2x	1.4x	UNILEVERCL	47,295	1.4%	0.3	81.3x	18.3x
Textile	1,018	1,021	-3.26	-0.32%	58	106,005	1.6%	484.7	9.9%	NM	0.7x	ICB	40,674	1.2%	37.1	NM	1.0x
Paper & Printing	3,977	3,997	-20.05	-0.50%	6	17,967	0.3%	77.1	1.6%	NM	0.9x	BXPHERMA	38,812	1.2%	12.8	6.1x	0.8x
Tannery	1,869	1,876	-7.58	-0.40%	6	20,822	0.3%	45.4	0.9%	64.0x	1.5x	DUTCHBANGL	38,668	1.2%	8.1	8.9x	0.7x
Jute	10,735	10,833	-97.62	-0.90%	3	2,363	0.0%	13.7	0.3%	NM	NM	EBL	37,821	1.1%	28.0	5.6x	0.8x
Ceramics	370	370	-0.05	-0.01%	5	16,595	0.2%	91.5	1.9%	NM	1.1x	PUBALIBANK	33,577	1.0%	3.7	4.3x	0.6x
Miscellaneous	4,023	4,005	+17.66	+0.44%	15	218,454	3.3%	145.3	3.0%	81.6x	1.7x	CITYBANK	30,729	0.9%	71.1	3.0x	0.6x
Corporate Bond**	14,952	15,150	-197.70	-1.31%	16	33,010	0.5%	0.6	0.0%	NM	NM	POWERGRID	30,521	0.9%	2.3	NM	0.2x
Treasury Bond**	2,061	2,073	-12.64	-0.61%	236	3,301,124	49.6%	2.0	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
RUPALIBANK	21.0	+9.9%	12.3	NM	0.6x	SQURPHARMA	108,958	7.7%	7.8x	1.4x	BRACBANK	53.8	+5.1%	248.8	7.9x	1.3x
IBP	13.9	+9.4%	59.5	NM	1.0x	ISLAMIBANK	74,730	5.3%	15.2x	1.0x	AGNISYSL	26.9	-1.8%	154.1	20.2x	1.6x
CAPMIBBLMF	9.1	+8.3%	7.7	NM	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	27.1	+6.3%	149.6	21.3x	1.8x
PREMIERLEA	3.0	+7.1%	0.3	NM	NM	BATBC	50,233	3.6%	9.2x	2.9x	BEACHHATCH	49.3	-0.6%	130.3	10.5x	3.0x
1STPRIMFMF	19.8	+6.5%	42.3	NM	1.9x	WALTONHIL	46,773	3.3%	9.7x	1.1x	SQURPHARMA	207.6	-0.0%	122.7	7.8x	1.4x
UNIONCAP	5.0	+6.38%	2.7	NM	NM	BRACBANK	46,489	3.3%	7.9x	1.3x	ASIATICLAB	40.1	+2.8%	117.0	16.6x	0.7x
MIDLANDBNK	27.1	+6.3%	149.6	21.3x	2x	GP	44,708	3.2%	13.8x	5.7x	LOVELLO	96.2	-4.7%	107.2	43.4x	7.6x
GPHISPAT	18.9	+6.2%	31.7	24.0x	0.4x	RENATA	32,968	2.3%	19.8x	1.6x	FINEFOODS	233.9	-1.1%	88.2	52.7x	16.0x
GHCL	20.9	+6.1%	4.2	NM	0.3x	BXPHERMA	23,409	1.7%	6.1x	0.8x	ISLAMIBANK	44.1	+2.8%	80.0	15.2x	1.0x
PRIMEBANK	24.5	+6.1%	32.8	3.5x	0.7x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	CITYBANK	20.2	+3.1%	71.1	3.0x	0.6x
						CITYBANK	21,020	1.5%	3.0x	0.6x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	15.1x	2.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMICFIN	8.0	-9.1%	5.3	NM	NM	OLYMPIC	20,496	1.5%	16.3x	2.5x	MIDLANDBNK	25.9	24.2	7.0	2,315	58.98
FAREASTFIN	3.6	-7.7%	1.3	NM	NM	ALARABANK	18,282	1.3%	35.3x	0.8x	NTLTUBES	88.1	85.1	10.0	292	24.88
LOVELLO	96.2	-4.7%	107.2	43.4x	7.6x	BEACONPHAR	17,838	1.3%	28.4x	3.8x	BRACBANK	52.0	52.0	3.0	400	20.80
BAYLEASING	4.3	-4.4%	0.7	NM	NM	PRIMEBANK	16,142	1.1%	3.5x	0.7x	SEMLLECMF	13.2	12.5	6.0	902	11.38
EASTRNLAB	2,512.3	-3.7%	58.6	59.9x	13.1x	ROBI	14,876	1.1%	17.8x	1.8x	AL-HAJTEX	125.6	125.0	4.0	45	5.64
GQBALLPEN	167.5	-3.3%	6.7	NM	1.2x	UTTARABANK	13,699	1.0%	NM	0.6x	RELIANCE1	19.1	19.0	2.0	269	5.12
STANDBANKL	5.9	-3.3%	14.7	7.9x	0.4x	NBL	13,055	0.9%	NM	7.6x	IFADAUTOS	24.7	24.7	1.0	200	4.94
CNATEX	3.1	-3.1%	1.1	NM	NM	BSRMLTD	12,852	0.9%	4.5x	0.5x	CAPMBDBLMF	9.8	9.7	3.0	460	4.48
FAREASTLIF	25.2	-3.1%	0.4	NM	NM						AIL	49.4	49.0	2.0	67	3.29
LEGACYFOOT	58.1	-3.0%	35.7	NM	5.3x						NEWLINE	8.2	8.2	1.0	300	2.46

* 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
MIDLANDBNK	25.9	24.2	59.0	2,315	7
NLTUBES	88.1	85.1	24.9	292	10
BRACBANK	52.0	52.0	20.8	400	3
SEMLLECMF	13.2	12.5	11.4	902	6
AL-HAJTEX	125.6	125.0	5.6	45	4
RELIANCE1	19.1	19.0	5.1	269	2
IFADAUTOS	24.7	24.7	4.9	200	1
CAPMBDBLMF	9.8	9.7	4.5	460	3
AIL	49.4	49.0	3.3	67	2
NEWLINE	8.2	8.2	2.5	300	1
PADMALIFE	20.5	20.5	2.3	114	1
MIRAKHTER	29.1	26.5	2.3	83	2
SHEPHERD	18.5	18.4	1.8	100	2
GPHISPAT	17.8	17.8	1.8	100	1
IFIC	5.9	5.9	1.8	300	1
ORIONINFU	335.0	335.0	1.7	5	1
DUTCHBANGL	35.3	35.3	1.5	43	1
SAPORTL	22.2	22.2	1.4	63	1
RDFOOD	23.0	23.0	1.4	60	1
ASIATICLAB	38.5	38.5	1.0	27	1
LHB	47.6	47.6	0.9	20	1
MERCANBANK	8.0	8.0	0.9	107	1
Total			167.8		64

Important DSE News

REPUBLIC

Refer to their earlier news disseminated by DSE on 04.05.2025 regarding dividend declaration, the company has further informed that the reasons for declaration of Stock Dividend for the year ended December 31, 2024, 1. The primary reason of declaration of Stock Dividend is to maintain steady growth of Investments, e.g. FDR, Govt. Treasury Bond to enhance the company's financial strength and part of the profit of the company has already been invested in FDR & related accrued interest by Tk. 4.50 crore and Government Treasury Bond by Tk. 50 lac during the year. The company has also plan to invest in renovation of the company's acquired Floor space at S.F. Tower, Agrabad C/A, Chattogram. 2. The bonus share is declared from current year's profit of the Company. 3. The declaration of bonus shares is no use of capital reserve or revaluation reserve or any unrealized gain or out of profit earned prior to incorporation of the company or through reducing paid up capital or through doing anything so that the post-dividend retained earnings become negative or a debit balance.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
RUPALIBANK		0.0%	0.0%	Record Date	15-Jul-25
BIFC		0.0%	0.0%	Record Date	15-Jul-25
TAKAFULINS		0.0%	10.0%	Record Date	16-Jul-25
DGIC		0.0%	1.0%	Record Date	17-Jul-25
IFIC		0.0%	0.0%	Record Date	17-Jul-25
FIRSTSBANK		0.0%	0.0%	Record Date	20-Jul-25
SOUTHEASTB		0.0%	0.0%	Record Date	20-Jul-25
NRBBANK		0.0%	0.0%	Record Date	21-Jul-25
SONARBAINS		0.0%	10.0%	Record Date	21-Jul-25
BAYLEASING		0.0%	0.0%	Record Date	21-Jul-25
FIRSTFIN		0.0%	0.0%	Record Date	22-Jul-25

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