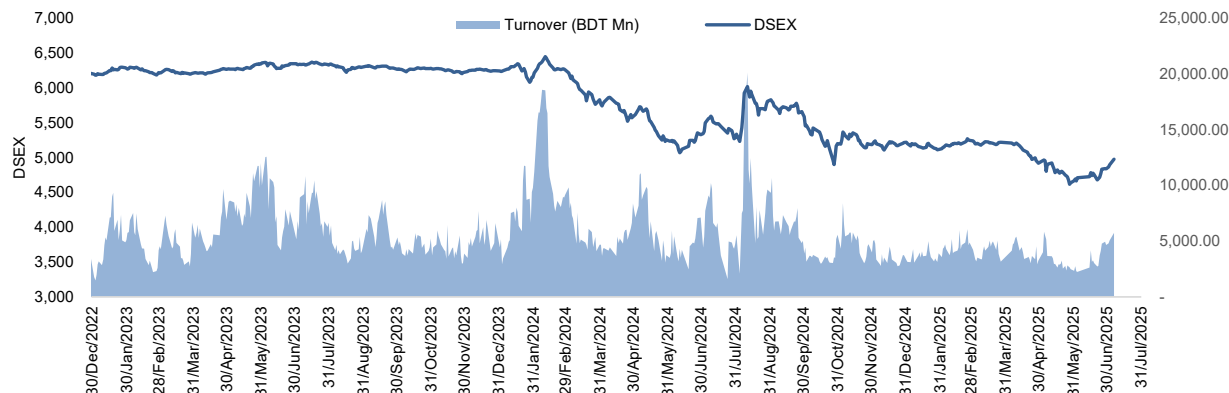


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.68%) gained 82.1 points and closed at 4,976.16. The blue-chip index DS30 (+2.01%), the Shariah-based index DSES (+1.48%), and the large-cap index CDSET (+1.60%) closed at 1,873.00, 1,081.19, and 1,018.35 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 3.86% followed by NBFI (+2.23%), Pharmaceutical (+1.20%), Fuel & Power (+1.16%), Engineering (+1.08%), Telecommunication (+0.40%), and Food & Allied (-0.23%), respectively. Block trades contributed 1.6% of the overall market turnover. BRAC Bank Ltd. (+4.1%) was the most traded share with a turnover of BDT 378 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,976.16	4,894.07	+82.10	+1.68%	-4.6%
DS30	1,873.00	1,836.12	+36.89	+2.01%	-3.4%
DSES	1,081.19	1,065.39	+15.80	+1.48%	-7.5%
CDSET	1,018.35	1,002.34	+16.01	+1.60%	-4.5%

	Advanced	Declined	Unchanged	Total
All Category	278	73	45	396
A Category (Equity)	172	27	17	216
B Category (Equity)	49	25	9	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	57	21	19	97
Mutual Funds	30	2	4	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,680,614	6,660,061	+0.3%
	Mn USD	54,468	54,301	
Turnover	Mn BDT	5,735	5,062	+13.3%
	Mn USD	47	41	
Volume	Mn Shares	280	231	+21.4%
No. of Trade		169,260	159,410	+6.2%

* Average Interbank Exchange Rate is BDT 122.65 as of Jul 07, 2025

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Figure: Sectorial Turnover (BDT Mn)

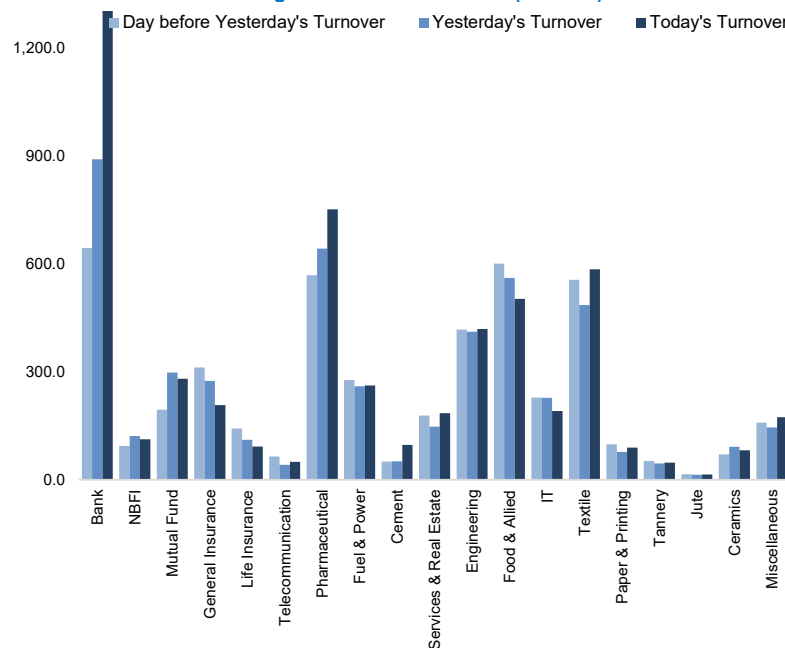
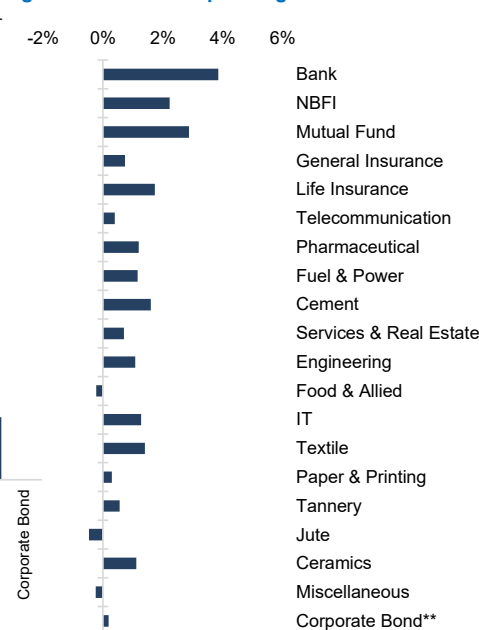


Figure: Sectorial Mcap Change



Market PE 13.4x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, 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	1,445	1,391	+53.68	+3.86%	36	683,746	10.2%	1,505.5	26.7%	19.8x	0.7x	GP	404,685	11.9%	22.4	13.8x	5.7x
NBFI	992	970	+21.62	+2.23%	23	94,531	1.4%	112.3	2.0%	NM	NM	SQURPHARMA	185,357	5.5%	115.8	7.9x	1.4x
Mutual Fund	649	631	+18.16	+2.88%	37	29,820	0.4%	280.6	5.0%	NM	0.6x	BATBC	151,902	4.5%	46.3	9.2x	2.9x
General Insurance	2,509	2,490	+18.35	+0.74%	43	71,597	1.1%	207.2	3.7%	12.0x	1.1x	ROBI	129,901	3.8%	23.0	18.0x	1.9x
Life Insurance	1,584	1,557	+27.06	+1.74%	15	42,126	0.6%	92.3	1.6%	NM	NM	WALTONHIL	125,958	3.7%	9.0	9.8x	1.1x
Telecommunication	4,754	4,736	+18.91	+0.40%	3	557,498	8.3%	49.9	0.9%	14.7x	3.6x	BRACBANK	111,492	3.3%	377.8	8.2x	1.3x
Pharmaceutical	2,825	2,791	+33.37	+1.20%	34	535,493	8.0%	750.9	13.3%	12.4x	1.5x	BEXIMCO	103,850	3.1%	0.0	NM	1.3x
Fuel & Power	1,091	1,078	+12.50	+1.16%	23	288,941	4.3%	261.6	4.6%	18.2x	0.6x	MARICO	78,485	2.3%	9.5	13.3x	10.4x
Cement	1,812	1,783	+28.60	+1.60%	7	86,357	1.3%	96.7	1.7%	20.7x	1.9x	BERGERPBL	74,838	2.2%	16.5	21.0x	4.6x
Services & Real Estate	942	935	+6.57	+0.70%	9	51,791	0.8%	185.1	3.3%	23.8x	0.4x	ISLAMIBANK	73,416	2.2%	58.8	15.7x	1.0x
Engineering	2,317	2,293	+24.73	+1.08%	42	261,409	3.9%	418.3	7.4%	12.0x	0.8x	RENATA	55,915	1.6%	6.8	19.9x	1.6x
Food & Allied	14,327	14,359	-32.36	-0.23%	21	262,143	3.9%	502.0	8.9%	15.2x	4.2x	LHB	54,236	1.6%	48.0	15.1x	2.7x
IT	1,753	1,731	+22.09	+1.28%	11	23,127	0.3%	190.7	3.4%	19.5x	1.5x	UNILEVERCL	46,426	1.4%	0.7	79.8x	18.0x
Textile	1,032	1,018	+14.32	+1.41%	58	107,496	1.6%	584.0	10.3%	NM	0.7x	ICB	41,542	1.2%	10.8	NM	1.0x
Paper & Printing	3,989	3,977	+11.88	+0.30%	6	18,021	0.3%	89.1	1.6%	NM	0.9x	BXPHERMA	41,444	1.2%	85.5	6.5x	0.8x
Tannery	1,879	1,869	+10.47	+0.56%	6	20,939	0.3%	47.4	0.8%	64.4x	1.5x	DUTCHBANGL	39,828	1.2%	7.3	9.2x	0.8x
Jute	10,685	10,735	-49.75	-0.46%	3	2,352	0.0%	14.7	0.3%	NM	NM	EBL	38,778	1.1%	37.9	5.7x	0.8x
Ceramics	374	370	+4.12	+1.11%	5	16,779	0.3%	81.7	1.4%	NM	1.1x	PUBALIBANK	34,228	1.0%	11.2	4.4x	0.6x
Miscellaneous	4,013	4,023	-9.55	-0.24%	15	217,935	3.3%	173.4	3.1%	81.5x	1.7x	CITYBANK	32,402	1.0%	153.8	3.2x	0.7x
Corporate Bond**	14,981	14,952	+28.76	+0.19%	16	33,074	0.5%	0.4	0.0%	NM	NM	POWERGRID	31,161	0.9%	4.3	NM	0.2x
Treasury Bond**	2,044	2,061	-16.76	-0.81%	236	3,274,681	49.0%	0.0	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	23.1	+10.0%	88.2	NM	0.7x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	BRACBANK	56.0	+4.1%	377.8	8.2x	1.3x
REGENTTEX	3.3	+10.0%	0.7	NM	0.1x	ISLAMIBANK	74,730	5.3%	15.7x	1.0x	CITYBANK	21.3	+5.4%	153.8	3.2x	0.7x
TOSRIFA	20.9	+10.0%	55.6	32.2x	0.7x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	29.2	+7.7%	152.5	23.0x	2.0x
RAHIMTEXT	123.3	+10.0%	7.7	NM	4.9x	BATBC	50,233	3.6%	9.2x	2.9x	BEACHHATCH	48.9	-0.8%	117.7	10.4x	3.0x
ABBBANK	7.0	+9.4%	36.5	NM	1.6x	WALTONHIL	46,773	3.3%	9.8x	1.1x	SQURPHARMA	209.1	+0.7%	115.8	7.9x	1.4x
EXIMBANK	6.1	+8.93%	14.8	40.7x	0.3x	BRACBANK	46,489	3.3%	8.2x	1.3x	SEAPPEARL	53.2	-1.1%	107.6	NM	3.2x
HEIDELBCEM	240.0	+8.7%	20.1	51.2x	3x	GP	44,708	3.2%	13.8x	5.7x	LOVELLO	92.3	-4.1%	104.2	41.6x	7.3x
EBLNRBMF	3.8	+8.6%	5.7	NM	0.4x	RENATA	32,968	2.3%	19.9x	1.6x	BSC	92.5	+2.5%	102.4	4.7x	0.9x
DESCO	25.0	+7.8%	8.4	NM	0.7x	BXPHERMA	23,409	1.7%	6.5x	0.8x	AGNISYSL	26.9	-	98.4	20.2x	1.6x
MIDLANDBNK	29.2	+7.7%	152.5	23.0x	2.0x	PUBALIBANK	22,905	1.6%	4.4x	0.6x	ASIATICLAB	40.7	+1.5%	93.2	16.9x	0.8x
						CITYBANK	21,020	1.5%	3.2x	0.7x						
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)
RENWICKJA	622.9	-6.3%	0.1	NM	NM	OLYMPIC	20,496	1.5%	16.5x	2.5x	SEMLLECMF	13.6	12.5	3.0	2,837	37.70
PRIMELIFE	35.0	-4.1%	5.2	NM	NM	ALARABANK	18,282	1.3%	35.3x	0.8x	MIDLANDBNK	28.1	25.5	9.0	715	19.65
LOVELLO	92.3	-4.1%	104.2	41.6x	7.3x	BEACONPHAR	17,838	1.3%	28.6x	3.8x	NLTUBES	85.6	82.7	3.0	64	5.34
SAIFPOWER	7.2	-4.0%	6.2	10.3x	0.4x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	BXPHERMA	90.7	89.9	2.0	57	5.14
MEGCONMILK	17.9	-3.8%	0.8	NM	NM	ROBI	14,876	1.1%	18.0x	1.9x	IFIC	6.1	6.1	1.0	450	2.75
APOLOISPAT	3.3	-2.9%	0.3	NM	0.2x	UTTARABANK	13,699	1.0%	NM	0.6x	ISLAMIBANK	46.5	45.0	2.0	50	2.29
FAREASTFIN	3.5	-2.8%	1.1	NM	NM	NBL	13,055	0.9%	NM	7.8x	SAIHAMTEX	14.0	14.0	1.0	150	2.10
NEWLINE	7.3	-2.7%	2.6	NM	0.3x	BSRMLTD	12,852	0.9%	4.6x	0.5x	EIL	49.9	49.9	2.0	41	2.05
ISLAMICFIN	7.8	-2.5%	5.0	NM	NM	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
MEGHNAPE	24.8	-2.4%	0.2	NM	0.3x	** 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	Important DSE News
SEMLLECMF	13.6	12.5	37.7	2,837	3	BPPL The company has informed that the Board has appointed Mr. Faisal Ahmed Chowdhury as new Managing Director of the Company for a term of 5 (five) years with effect from July 04, 2025.
MIDLANDBNK	28.1	25.5	19.6	715	9	
NLTUBES	85.6	82.7	5.3	64	3	The company has informed that the Board has elected Mr. Gulam Rabbani Chowdhury as new Chairman of the Company for a term of 5 (five) years with effect from July 04, 2025.
BXPHARMA	90.7	89.9	5.1	57	2	
IFIC	6.1	6.1	2.7	450	1	
ISLAMIBANK	46.5	45.0	2.3	50	2	
SAIHAMTEX	14.0	14.0	2.1	150	1	
EIL	49.9	49.9	2.0	41	2	
SHEPHERD	18.5	18.5	1.9	100	1	
IFADAUTOS	24.7	24.7	1.2	50	1	
ABB1STMF	4.2	4.2	1.2	290	1	
AL-HAJTEX	123.0	123.0	1.2	10	1	
MEGHNAINS	23.5	23.5	1.2	50	1	
KBPPWBIL	99.5	99.5	1.0	10	1	
JANATAINS	24.4	24.4	0.9	35	1	
GENEXIL	21.0	21.0	0.8	36	1	
BEACHHATCH	44.6	44.6	0.7	16	1	
PREMIERCEM	49.6	49.6	0.7	14	1	
ACFL	15.7	15.7	0.7	44	1	
CITYGENINS	45.6	45.6	0.7	15	1	
ACMEPL	12.5	12.5	0.6	50	1	
LOVELLO	96.5	96.5	0.6	6	1	
Total			90.7		38	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PREMIERBAN		0.0%	0.0%	Record Date	3-Jul-25
DHAKABANK		5.0%	0.0%	Record Date	8-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

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