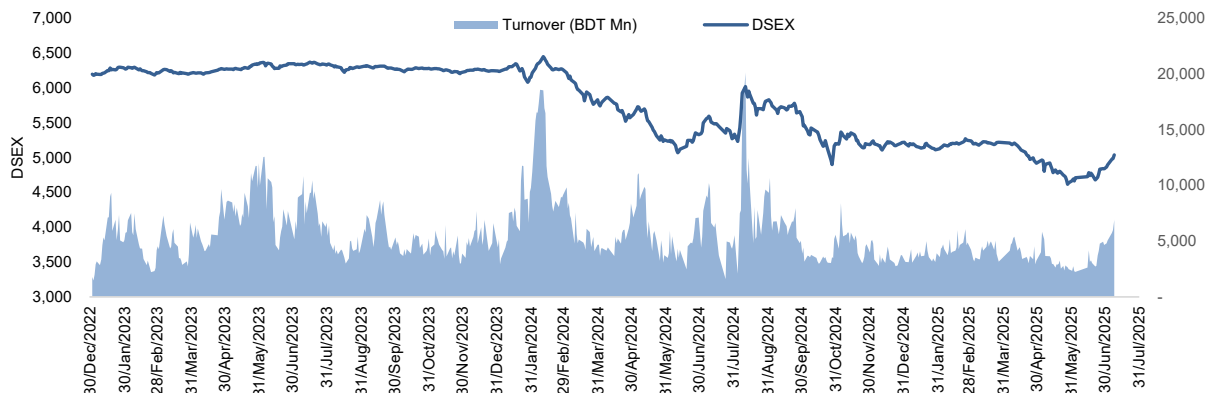


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.08%) gained 53.83 points and closed at 5,035.47. The blue-chip index DS30 (+1.00%), the Shariah-based index DSES (+0.96%), and the large-cap index CDSET (+0.88%) closed at 1,894.21, 1,094.11, and 1,026.02 points, respectively. All of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 2.29% followed by Fuel & Power (+1.59%), NBFI (+1.17%), Food & Allied (+1.03%), Telecommunication (+0.84%), Pharmaceutical (+0.81%), and Bank (+0.34%), respectively. Block trades contributed 2.2% of the overall market turnover. BRAC Bank Ltd. (+0.7%) was the most traded share with a turnover of BDT 194 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,035.47	4,981.64	+53.83	+1.08%	-3.5%
DS30	1,894.21	1,875.39	+18.82	+1.00%	-2.3%
DSES	1,094.11	1,083.76	+10.35	+0.96%	-6.4%
CDSET	1,026.02	1,017.04	+8.98	+0.88%	-3.8%

	Advanced	Declined	Unchanged	Total
All Category	273	78	46	397
A Category (Equity)	147	44	26	217
B Category (Equity)	59	17	7	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	67	17	13	97
Mutual Funds	14	7	15	36
Corporate Bonds	0	0	1	1
Treasury Bonds	0	2	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,726,696	6,686,997	+0.6%
	Mn USD	55,133	54,807	
Turnover	Mn BDT	6,906	6,018	+14.8%
	Mn USD	57	49	
Volume	Mn Shares	309	253	+22.2%
No. of Trade		208,093	182,387	+14.1%

* Average Interbank Exchange Rate is BDT 122.01 as of Jul 09, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Rakibul Hasan Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

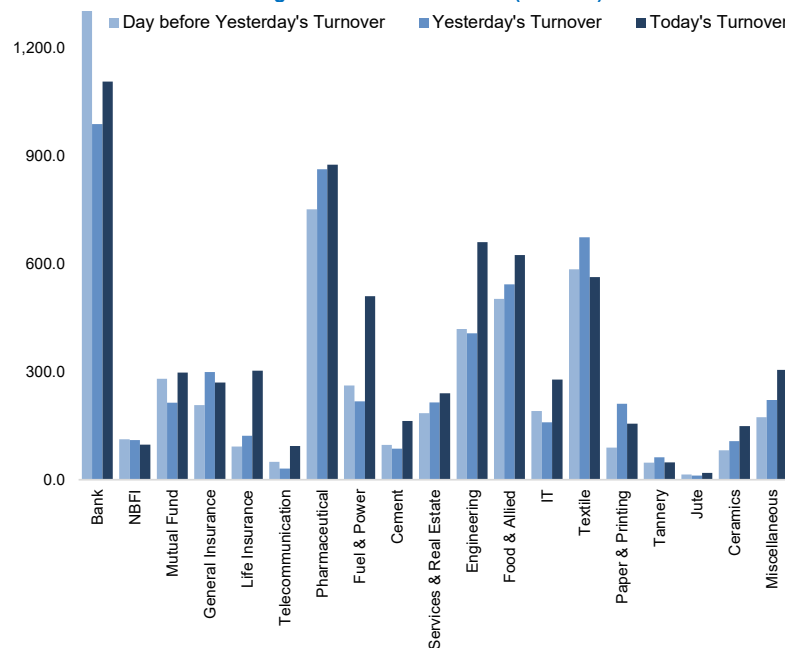
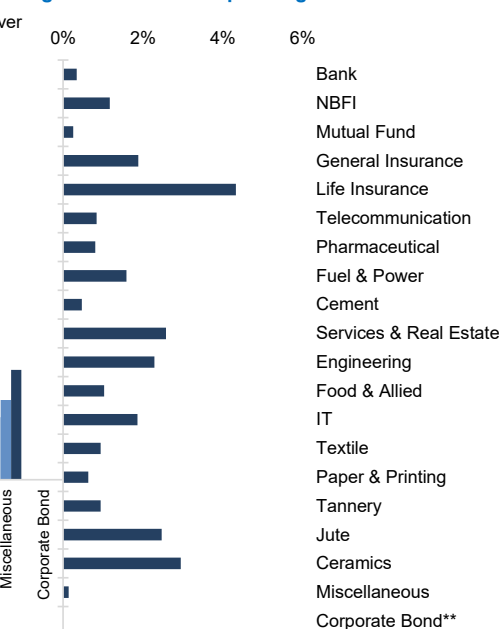


Figure: Sectorial Mcap Change



Market PE 13.6x

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	1,443	1,438	+4.92	+0.34%	36	682,859	10.2%	1,105.3	16.4%	19.8x	0.7x	GP	404,550	11.8%	29.1	13.8x	5.7x
NBFI	997	985	+11.52	+1.17%	23	94,982	1.4%	97.2	1.4%	NM	NM	SQURPHARMA	185,180	5.4%	81.3	7.9x	1.4x
Mutual Fund	642	640	+1.62	+0.25%	37	29,510	0.4%	297.8	4.4%	NM	0.6x	BATBC	153,198	4.5%	36.0	9.3x	2.9x
General Insurance	2,564	2,517	+47.50	+1.89%	43	73,176	1.1%	270.2	4.0%	12.3x	1.1x	ROBI	133,043	3.9%	59.3	18.4x	1.9x
Life Insurance	1,671	1,602	+69.41	+4.33%	15	44,449	0.7%	302.6	4.5%	NM	NM	WALTONHIL	129,138	3.8%	17.6	10.0x	1.1x
Telecommunication	4,782	4,742	+39.88	+0.84%	3	560,711	8.3%	93.4	1.4%	14.8x	3.6x	BRACBANK	112,288	3.3%	194.3	8.3x	1.3x
Pharmaceutical	2,861	2,838	+22.90	+0.81%	34	542,395	8.1%	874.7	12.9%	12.5x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,106	1,089	+17.30	+1.59%	23	292,995	4.4%	509.2	7.5%	18.5x	0.6x	MARICO	79,412	2.3%	13.6	13.4x	10.5x
Cement	1,837	1,829	+8.64	+0.47%	7	87,552	1.3%	163.5	2.4%	21.0x	1.9x	BERGERPBL	74,646	2.2%	16.7	20.9x	4.6x
Services & Real Estate	974	950	+24.47	+2.58%	9	53,578	0.8%	240.2	3.6%	24.6x	0.4x	UPGDCL	72,114	2.1%	3.8	6.2x	1.7x
Engineering	2,373	2,319	+53.08	+2.29%	42	267,645	4.0%	659.6	9.8%	12.3x	0.8x	RENATA	56,305	1.6%	24.9	20.0x	1.6x
Food & Allied	14,476	14,328	+147.81	+1.03%	21	264,865	3.9%	623.9	9.2%	15.3x	4.2x	LHB	54,701	1.6%	49.4	15.2x	2.7x
IT	1,785	1,752	+32.68	+1.87%	11	23,540	0.3%	277.8	4.1%	19.8x	1.5x	UNILEVERCL	46,657	1.4%	0.4	80.2x	18.1x
Textile	1,036	1,026	+9.68	+0.94%	58	107,911	1.6%	562.4	8.3%	NM	0.7x	BXPBARMA	41,801	1.2%	59.6	6.5x	0.8x
Paper & Printing	4,123	4,097	+25.81	+0.63%	6	18,628	0.3%	156.0	2.3%	NM	0.9x	ICB	41,542	1.2%	10.3	NM	1.0x
Tannery	1,906	1,888	+17.82	+0.94%	6	21,234	0.3%	48.2	0.7%	65.3x	1.6x	DUTCHBANGL	40,118	1.2%	5.2	9.2x	0.8x
Jute	11,056	10,789	+266.93	+2.47%	3	2,434	0.0%	19.1	0.3%	NM	NM	EBL	39,257	1.1%	41.7	5.8x	0.8x
Ceramics	386	375	+11.05	+2.95%	5	17,321	0.3%	149.1	2.2%	NM	1.1x	PUBALIBANK	33,577	1.0%	9.6	4.3x	0.6x
Miscellaneous	4,029	4,023	+5.51	+0.14%	15	218,785	3.3%	304.7	4.5%	81.8x	1.7x	CITYBANK	32,250	0.9%	57.1	3.2x	0.7x
Corporate Bond**	15,045	15,045	-	-	16	33,215	0.5%	0.3	0.0%	NM	NM	POWERGRID	31,526	0.9%	2.1	NM	0.2x
Treasury Bond**	2,052	2,049	+3.46	+0.17%	236	3,288,133	48.9%	0.5	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	140.2	+10.0%	12.0	NM	5.5x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	BRACBANK	56.4	+0.7%	194.3	8.3x	1.3x
NATLIFEINS	94.3	+9.9%	47.3	NM	NM	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	BEACHHATCH	50.9	+3.7%	168.4	10.9x	3.1x
SHARPIND	17.8	+9.9%	27.9	27.8x	1.7x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	28.3	-2.1%	137.3	22.3x	1.9x
SPCL	41.3	+9.8%	89.4	NM	1.1x	BATBC	50,233	3.6%	9.3x	2.9x	BSC	94.0	+1.7%	131.0	4.8x	1.0x
FAMILYTEX	2.4	+9.1%	1.6	NM	0.2x	WALTONHIL	46,773	3.3%	10.0x	1.1x	BPPL	15.8	+6.0%	114.8	68.7x	0.6x
REGENTTEX	3.9	+8.33%	0.7	NM	0.1x	BRACBANK	46,489	3.3%	8.3x	1.3x	LOVELLO	94.8	-0.9%	111.8	42.7x	7.5x
MIRACLEIND	28.9	+7.8%	9.6	NM	2x	GP	44,708	3.2%	13.8x	5.7x	ORIONINFU	324.8	+0.5%	101.9	NM	20.7x
SALAMCRST	22.3	+7.2%	64.4	NM	1.2x	RENATA	32,968	2.3%	20.0x	1.6x	SEAPEARL	58.0	+1.9%	100.5	NM	3.5x
BAYLEASING	4.8	+6.7%	1.3	NM	NM	BXPBARMA	23,409	1.7%	6.5x	0.8x	IBP	14.1	-0.7%	95.0	NM	1.0x
EXIM1STMF	4.9	+6.5%	44.1	NM	0.5x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	AGNISYSL	27.1	+1.1%	89.6	20.4x	1.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.2x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEMLLECMF	12.4	-8.1%	56.2	NM	1.4x	LHB	20,953	1.5%	15.2x	2.7x	MIDLANDBNK	27.9	27.0	12.0	1,883	51.78
YPL	13.9	-6.1%	8.5	NM	3x	OLYMPIC	20,496	1.5%	16.6x	2.5x	LOVELLO	102.2	86.5	7.0	327	30.12
EIL	46.8	-3.7%	23.1	38.7x	2.4x	ALARABANK	18,282	1.3%	34.9x	0.8x	PREMIERCEM	52.6	51.5	10.0	405	21.27
DSHGARME	112.4	-3.4%	30.2	NM	6.1x	BEACONPHAR	17,838	1.3%	30.8x	4.1x	FINEFOODS	234.1	234.0	2.0	38	8.89
BIFC	5.9	-3.3%	0.4	NM	NM	PRIMEBANK	16,142	1.1%	3.6x	0.7x	BRACBANK	56.5	53.0	2.0	150	8.44
FIRSTFIN	3.0	-3.2%	0.4	NM	NM	ROBI	14,876	1.1%	18.4x	1.9x	TILIL	40.0	40.0	5.0	100	4.00
HEIDELBCEM	243.3	-3.0%	16.6	51.9x	3.2x	UTTARABANK	13,699	1.0%	NM	0.6x	HAMI	111.6	107.8	2.0	20	2.19
FBFIF	3.6	-2.7%	3.8	NM	0.4x	NBL	13,055	0.9%	NM	8.2x	CENTRALINS	34.1	34.0	2.0	59	2.01
SIBL	8.1	-2.4%	3.9	NM	0.5x	BSRMLTD	12,852	0.9%	4.7x	0.5x	DUTCHBANGL	45.3	45.3	1.0	43	1.96
TOSRIFA	20.4	-2.4%	26.7	31.4x	0.7x	* 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					SEAPEARL	56.0	55.1	2.0	32	1.78

* 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	27.9	27.0	51.8	1,883	12
LOVELLO	102.2	86.5	30.1	327	7
PREMIERCEM	52.6	51.5	21.3	405	10
FINEFOODS	234.1	234.0	8.9	38	2
BRACBANK	56.5	53.0	8.4	150	2
TILIL	40.0	40.0	4.0	100	5
HAMI	111.6	107.8	2.2	20	2
CENTRALINS	34.1	34.0	2.0	59	2
DUTCHBANGL	45.3	45.3	2.0	43	1
SEAPEARL	56.0	55.1	1.8	32	2
AL-HAJTEX	121.0	120.4	1.3	11	2
ASIATICLAB	41.2	41.2	1.3	32	1
NLTUBES	91.1	91.1	1.3	14	1
BEACONPHAR	123.1	123.1	1.2	10	1
AMANFEED	24.2	24.2	1.2	50	1
SPCL	39.8	39.8	1.2	30	1
BEACHHATCH	46.6	46.6	1.1	23	1
CAPITECGBF	7.9	7.9	1.0	130	1
AGNISYSL	29.4	29.4	0.9	29	1
MONNOAGML	295.0	295.0	0.7	3	1
SHEPHERD	18.1	18.1	0.7	41	1
REPUBLIC	28.7	28.7	0.7	24	1
Total			150.6		68

Important DSE News
DHAKABANK

Mr. Abdul Wahed, a Sponsor of the company, has further informed that he has completed the transfer of 10,326,262 shares of the company to his wife Ms. Zaheda Wahed Khan by way of gift outside the trading system of the Exchange as per declaration disseminated by DSE on 07.07.2025.

DOREENPWR

The Company has informed that the Board of Directors in its meeting held on April 23, 2025 has appointed Mr. Mohammad Abir Islam, FCS as the Company Secretary of the company with effect from July 03, 2025.

IBP

The company has informed that the Board of Directors of the company, in its meeting held on 08th July, 2025, has approved the signing of a Memorandum of Understanding (MoU) with Salar Yousafzai Pharma Ltd., a company based in Afghanistan, for the export of pharmaceutical products (medicine) to the Afghan market. Key Points of MoU: Exclusive Export Rights: Salar Yousafzai Pharma Ltd., will act as the sole agent in Afghanistan. Tenure: The MoU is valid for 15 years from 2025 to 2040, and renewable upon mutual agreement. Minimum Order Value: USD 1.5 Lac per shipment, with regular exports plan. Payment terms: 40% advance TT, 60% pre-shipment. Export on Free on Board (FOB) Chittagong basis. This strategic collaboration is expected to strengthen the Company's financial position through boost export revenue, strengthen foreign currency earnings, and support long-term business growth, thereby enhancing shareholder value.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MEGHNALIFE		0.0%	15.0%	Record Date	22-Jul-25

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