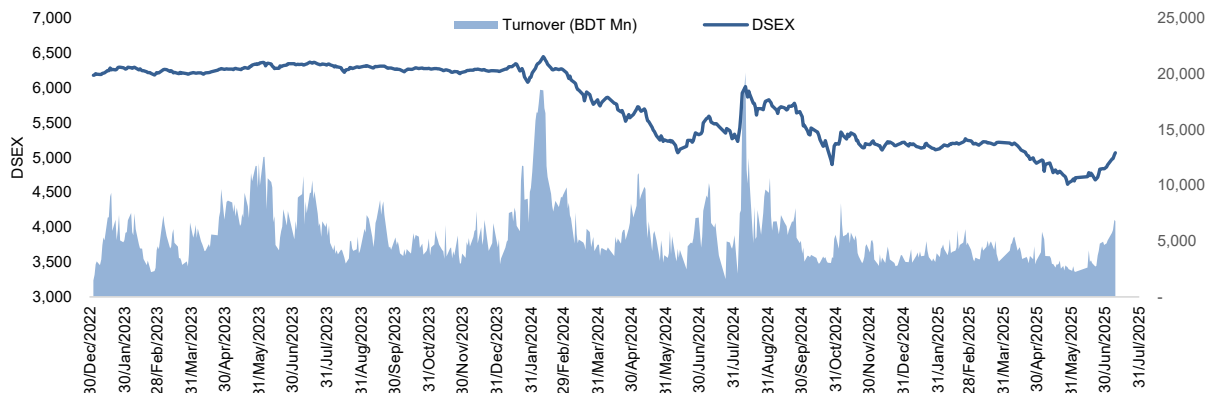


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.65%) gained 32.57 points and closed at 5,068.04. The blue-chip index DS30 (+0.76%), the Shariah-based index DSES (+0.63%), and the large-cap index CDSET (+0.55%) closed at 1,908.62, 1,100.96, and 1,031.70 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 1.07% followed by Pharmaceutical (+0.52%), Food & Allied (+0.37%), NBFI (+0.07%), Engineering (+0.05%), Telecommunication (-0.19%), and Fuel & Power (-0.26%), respectively. Block trades contributed 2.1% of the overall market turnover. BRAC Bank Ltd. (+4.1%) was the most traded share with a turnover of BDT 212 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,068.04	5,035.47	+32.57	+0.65%	-2.8%
DS30	1,908.62	1,894.21	+14.41	+0.76%	-1.6%
DSES	1,100.96	1,094.11	+6.84	+0.63%	-5.8%
CDSET	1,031.70	1,026.02	+5.68	+0.55%	-3.2%

	Advanced	Declined	Unchanged	Total
All Category	196	128	70	394
A Category (Equity)	101	76	37	214
B Category (Equity)	37	36	10	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	58	16	23	97
Mutual Funds	11	8	17	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	6,767,391	6,726,696	+0.6%
	Mn USD	55,642	55,307	
Turnover	Mn BDT	6,790	6,906	-1.7%
	Mn USD	56	57	
Volume	Mn Shares	273	309	-11.6%
No. of Trade		208,356	208,093	+0.1%

* Average Interbank Exchange Rate is BDT 121.62 as of Jul 10, 2025

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Figure: Sectorial Turnover (BDT Mn)

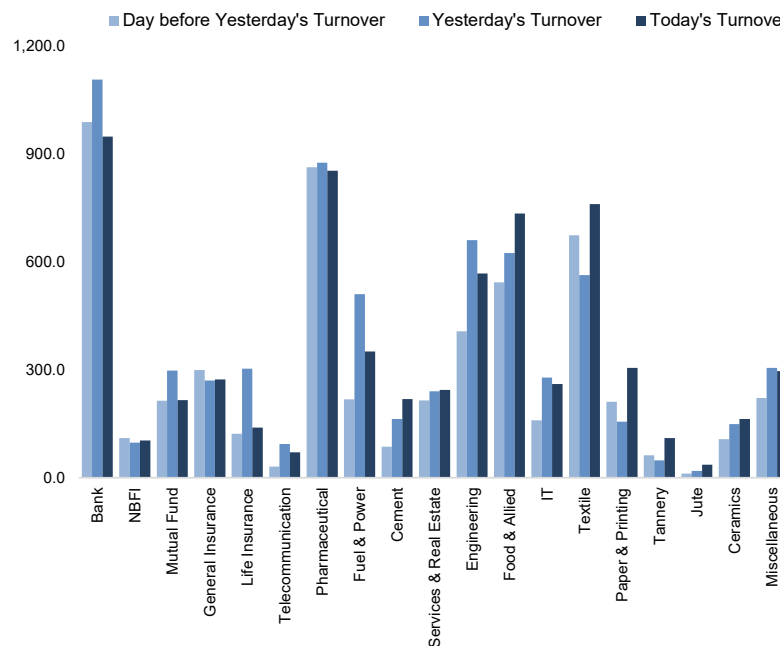
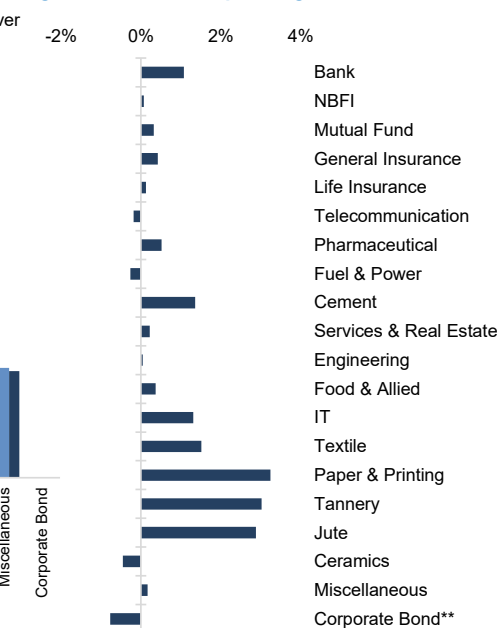


Figure: Sectorial Mcap Change



Market PE 14.4x

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	1,459	1,443	+15.50	+1.07%	36	690,195	10.2%	947.2	14.3%	33.1x	0.7x	GP	404,145	11.8%	17.1	13.8x	5.7x
NBFI	997	997	+0.72	+0.07%	23	95,050	1.4%	103.4	1.6%	NM	NM	SQURPHARMA	185,977	5.4%	75.1	7.9x	1.4x
Mutual Fund	644	642	+2.06	+0.32%	37	29,604	0.4%	215.2	3.2%	NM	0.6x	BATBC	152,550	4.4%	52.0	9.2x	2.9x
General Insurance	2,575	2,564	+10.83	+0.42%	43	73,485	1.1%	273.2	4.1%	12.4x	1.1x	ROBI	131,996	3.8%	46.9	18.3x	1.9x
Life Insurance	1,673	1,671	+2.19	+0.13%	15	44,508	0.7%	139.4	2.1%	NM	NM	WALTONHIL	129,169	3.8%	7.3	10.0x	1.1x
Telecommunication	4,773	4,782	-8.88	-0.19%	3	559,670	8.3%	70.9	1.1%	14.8x	3.6x	BRACBANK	116,867	3.4%	212.5	8.6x	1.4x
Pharmaceutical	2,876	2,861	+14.75	+0.52%	34	545,192	8.1%	852.1	12.8%	12.6x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,103	1,106	-2.91	-0.26%	23	292,225	4.3%	350.4	5.3%	18.4x	0.6x	MARICO	80,290	2.3%	5.9	13.6x	10.7x
Cement	1,862	1,837	+24.95	+1.36%	7	88,741	1.3%	218.5	3.3%	21.2x	1.9x	BERGERPBL	74,813	2.2%	8.9	21.0x	4.6x
Services & Real Estate	976	974	+2.18	+0.22%	9	53,698	0.8%	243.4	3.7%	24.7x	0.4x	UPGDCL	71,592	2.1%	4.4	6.1x	1.7x
Engineering	2,374	2,373	+1.16	+0.05%	42	267,775	4.0%	566.8	8.5%	12.3x	0.8x	LHB	56,559	1.6%	149.6	15.8x	2.8x
Food & Allied	14,529	14,476	+53.34	+0.37%	21	265,841	3.9%	733.5	11.0%	15.4x	4.2x	RENATA	56,052	1.6%	16.5	19.9x	1.6x
IT	1,808	1,785	+23.49	+1.32%	11	23,850	0.4%	259.9	3.9%	20.1x	1.5x	UNILEVERCL	46,627	1.4%	0.4	80.2x	18.1x
Textile	1,052	1,036	+15.68	+1.51%	58	109,544	1.6%	759.3	11.4%	NM	0.7x	BXPHARMA	42,648	1.2%	89.1	6.7x	0.9x
Paper & Printing	4,257	4,123	+133.74	+3.24%	6	19,232	0.3%	304.7	4.6%	NM	0.9x	ICB	41,455	1.2%	12.0	NM	1.0x
Tannery	1,963	1,906	+57.67	+3.03%	6	21,876	0.3%	109.8	1.7%	67.2x	1.6x	DUTCHBANGL	40,891	1.2%	9.6	9.4x	0.8x
Jute	11,375	11,056	+318.84	+2.88%	3	2,504	0.0%	36.4	0.5%	NM	NM	EBL	39,576	1.2%	40.0	5.8x	0.8x
Ceramics	384	386	-1.74	-0.45%	5	17,243	0.3%	163.0	2.5%	NM	1.1x	PUBALIBANK	33,967	1.0%	13.4	4.3x	0.6x
Miscellaneous	4,036	4,029	+6.72	+0.17%	15	219,150	3.2%	296.4	4.5%	81.9x	1.8x	CITYBANK	32,250	0.9%	49.7	3.2x	0.7x
Corporate Bond**	14,930	15,045	-115.27	-0.77%	16	32,961	0.5%	1.1	0.0%	NM	NM	OLYMPIC	31,570	0.9%	32.4	17.1x	2.6x
Treasury Bond**	2,068	2,052	+15.97	+0.78%	236	3,314,267	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
RAHIMTEXT	154.2	+10.0%	13.4	NM	6.1x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	BRACBANK	58.7	+4.1%	212.5	8.6x	1.4x
DSHGARME	123.6	+10.0%	49.5	NM	6.7x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	BEACHHATCH	50.2	-1.4%	158.7	10.7x	3.0x
GEMINISEA	137.3	+9.9%	26.9	NM	11.2x	BEXIMCO	69,463	4.9%	NM	1.3x	LHB	48.7	+3.4%	149.6	15.8x	2.8x
FORTUNE	16.9	+9.7%	35.5	NM	1.2x	BATBC	50,233	3.6%	9.2x	2.9x	SEAPEARL	59.9	+3.3%	145.3	NM	3.6x
RAHIMAFOOD	102.0	+9.7%	68.2	NM	11.1x	WALTONHIL	46,773	3.3%	10.0x	1.1x	LOVELLO	99.5	+5.0%	129.2	44.8x	7.9x
EPGL	18.2	+9.64%	53.4	NM	0.5x	BRACBANK	46,489	3.3%	8.6x	1.4x	MAGURAPLEX	88.1	+6.0%	129.2	25.7x	1.2x
SHARPIND	19.5	+9.6%	31.2	30.5x	2x	GP	44,708	3.2%	13.8x	5.7x	MIDLANDBNK	26.4	-6.7%	123.1	20.8x	1.8x
KPPL	18.7	+9.4%	22.8	NM	NM	RENATA	32,968	2.3%	19.9x	1.6x	BSC	94.7	+0.7%	120.0	4.8x	1.0x
APEXSPINN	103.8	+8.6%	22.8	27.9x	1.6x	BXPHARMA	23,409	1.7%	6.7x	0.9x	AGNISYSL	27.1	-	112.3	20.4x	1.6x
NBL	4.0	+8.1%	5.8	NM	8.9x	PUBALIBANK	22,905	1.6%	4.3x	0.6x	FINEFOODS	243.4	+1.6%	101.2	54.9x	16.7x
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)
MIDLANDBNK	26.4	-6.7%	123.1	20.8x	1.8x	LHB	20,953	1.5%	15.8x	2.8x	AL-HAJTEX	124.0	123.0	13.0	347	42.96
GHCL	20.3	-3.8%	2.2	NM	0x	OLYMPIC	20,496	1.5%	17.1x	2.6x	NLTUBES	87.0	85.5	3.0	135	11.64
HEIDELBCEM	234.3	-3.7%	11.7	50.0x	3.1x	ALARABANK	18,282	1.3%	34.9x	0.8x	FINEFOODS	240.0	222.0	5.0	46	10.70
SALAMCRST	21.5	-3.6%	44.8	NM	1.2x	BEACONPHAR	17,838	1.3%	30.1x	4.0x	SEMILLECMF	12.0	12.0	1.0	800	9.60
IBP	13.6	-3.5%	79.7	NM	1.0x	PRIMEBANK	16,142	1.1%	3.6x	0.7x	SQURPHARMA	191.0	191.0	1.0	42	7.94
GHAIL	12.1	-3.2%	17.1	NM	1.0x	ROBI	14,876	1.1%	18.3x	1.9x	BRACBANK	57.7	57.7	1.0	136	7.83
SEMLIBLSF	6.9	-2.8%	0.3	NM	0.8x	UTTARABANK	13,699	1.0%	NM	0.6x	CAPMBDBLMF	9.5	9.4	3.0	724	6.82
AIL	49.3	-2.8%	92.3	18.2x	2.1x	NBL	13,055	0.9%	NM	8.9x	EIL	48.8	47.8	7.0	138	6.70
PADMALIFE	22.5	-2.6%	0.5	NM	NM	BSRMLTD	12,852	0.9%	4.6x	0.5x	SHARPIND	19.0	19.0	1.0	300	5.70
NFML	11.4	-2.6%	1.9	NM	1.1x	* NBFJ 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					LOVELLO	88.5	88.0	3.0	45	3.99

* 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
AL-HAJTEX	124.0	123.0	43.0	347	13
NTLTUBES	87.0	85.5	11.6	135	3
FINEFOODS	240.0	222.0	10.7	46	5
SEMLLECMF	12.0	12.0	9.6	800	1
SQURPHARMA	191.0	191.0	7.9	42	1
BRACBANK	57.7	57.7	7.8	136	1
CAPMBDBLMF	9.5	9.4	6.8	724	3
EIL	48.8	47.8	6.7	138	7
SHARPIND	19.0	19.0	5.7	300	1
LOVELLO	88.5	88.0	4.0	45	3
ASIATICLAB	45.5	41.4	3.0	70	2
SPCL	41.0	41.0	2.5	60	1
TECHNODRUG	32.5	32.5	2.4	75	1
RAHIMAFood	97.1	96.0	2.3	24	3
JAMUNABANK	15.8	15.8	2.3	145	1
PRAGATILIF	94.0	94.0	2.1	23	1
TILIL	46.4	46.4	2.1	45	1
ADNTEL	75.1	73.2	1.5	20	2
DGIC	24.5	24.5	1.5	60	1
BEACONPHAR	103.0	103.0	1.2	12	1
HAKKANIPUL	70.0	59.5	1.2	18	2
MONNOCERA	85.0	85.0	1.1	13	1
Total			145.6		66

Important DSE News
GIB

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 21.09.2025, Time: 11:00 AM, Mode of 12th AGM: Hybrid System. Venue for physical presence: Banquet Hall, Kurmitola Golf Club, Dhaka Cantonment, Dhaka. Record Date: 31.07.2025. The Company has also reported EPS of Tk. (12.62), NAV per share of Tk. (21.77) and NOCFPS of Tk. 4.75 for the year ended December 31, 2024 as against Tk. (21.79), Tk. (9.14) and Tk. (0.16) respectively for the year ended December 31, 2023. (end).

IPDC

The company has informed that Mr. Ariful Islam, Chairman of the Company, has completed his buying of 5,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated by DSE on 08.07.2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
CLICL		0.0%	0.0%	Record Date	24-Jul-25
BERGERPBL		0.0%	525.0%	Record Date	24-Jul-25

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