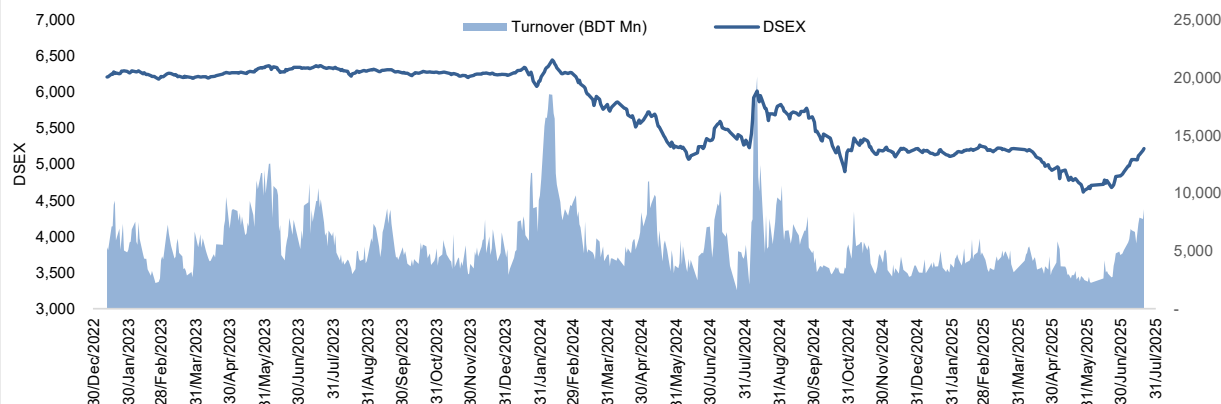


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.49%) gained 25.59 points and closed at 5,219.62. The blue-chip index DS30 (+0.91%), the Shariah-based index DSES (+0.85%), and the large-cap index CDSET (+1.07%) closed at 1,996.78, 1,146.78, and 1,066.73 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.80% followed by Engineering (+1.74%), Telecommunication (+1.66%), Bank (+1.45%), Pharmaceutical (+0.11%), NBFI (-0.72%), and Fuel & Power (-1.15%), respectively. Block trades contributed 1.6% of the overall market turnover. BRAC Bank Ltd. (-0.2%) was the most traded share with a turnover of BDT 246 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,219.62	5,194.03	+25.59	+0.49%	+0.1%
DS30	1,996.78	1,978.73	+18.05	+0.91%	+2.9%
DSES	1,146.78	1,137.16	+9.62	+0.85%	-1.9%
CDSET	1,066.73	1,055.47	+11.26	+1.07%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	117	224	55	396
A Category (Equity)	85	103	29	217
B Category (Equity)	16	60	6	82
N Category (Equity)	0	0	1	1
Z Category (Equity)	16	61	19	96
Mutual Funds	4	17	15	36
Corporate Bonds	1	0	3	4
Treasury Bonds	1	1	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,972,782	6,919,108	+0.8%
	Mn USD	57,390	56,948	
Turnover	Mn BDT	8,607	7,759	+10.9%
	Mn USD	71	64	
Volume	Mn Shares	312	278	+12.3%
No. of Trade		240,676	224,144	+7.4%

* Average Interbank Exchange Rate is BDT 121.50 as of Jul 21, 2025

Figure: Sectorial Turnover (BDT Mn)

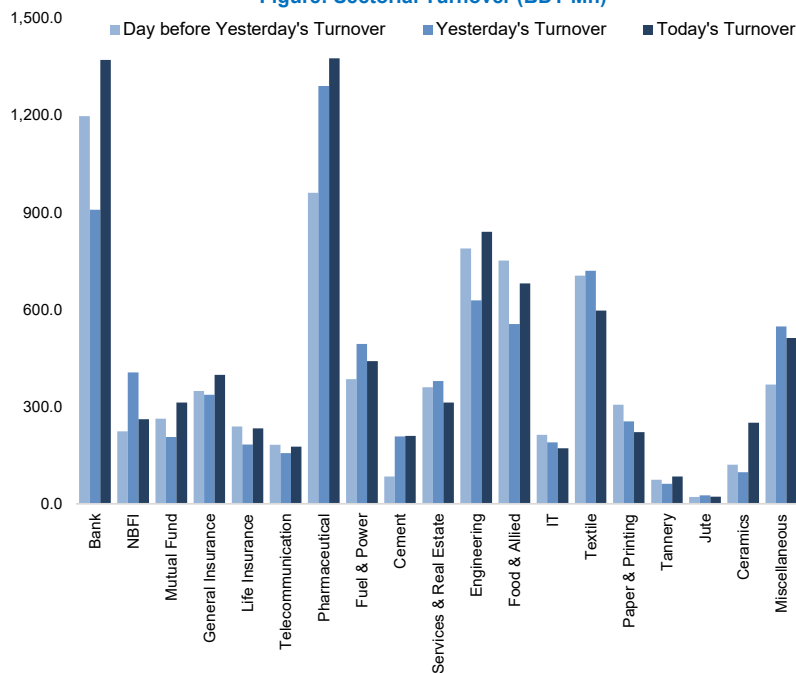
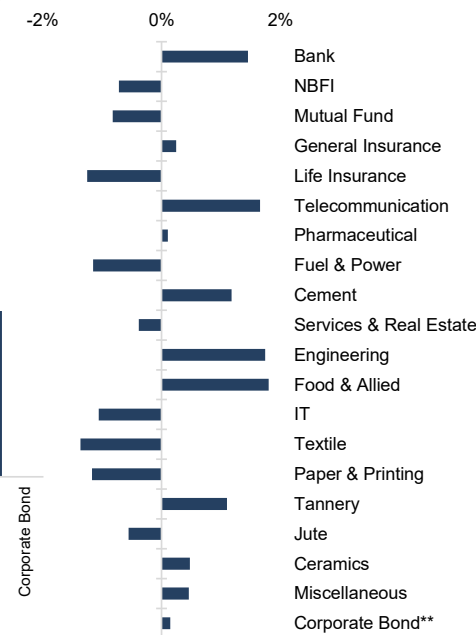


Figure: Sectorial Mcap Change



Market PE 15.0x

Market PB 1.2x

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

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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	1,490	1,469	+21.36	+1.45%	36	705,168	10.2%	1,371.0	16.2%	34.9x	0.8x	GP	418,728	11.8%	101.9	14.2x	7.4x
NBFI	1,079	1,086	-7.78	-0.72%	23	102,786	1.5%	261.2	3.1%	NM	NM	SQURPHARMA	191,385	5.4%	132.8	8.1x	1.4x
Mutual Fund	642	648	-5.32	-0.82%	37	29,520	0.4%	312.4	3.7%	NM	0.6x	BATBC	162,000	4.6%	176.1	9.8x	3.1x
General Insurance	2,637	2,630	+6.47	+0.25%	43	75,251	1.1%	398.1	4.7%	12.6x	1.1x	WALTONHIL	138,014	3.9%	44.5	10.7x	1.2x
Life Insurance	1,750	1,772	-22.15	-1.25%	15	46,540	0.7%	232.6	2.7%	NM	NM	ROBI	135,139	3.8%	65.1	18.7x	1.9x
Telecommunication	4,936	4,856	+80.48	+1.66%	3	578,818	8.4%	176.8	2.1%	15.2x	4.1x	BRACBANK	126,822	3.6%	246.3	9.3x	1.5x
Pharmaceutical	2,976	2,973	+3.17	+0.11%	34	564,189	8.1%	1,376.0	16.2%	13.0x	1.5x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Fuel & Power	1,134	1,147	-13.23	-1.15%	23	300,458	4.3%	440.9	5.2%	18.9x	0.6x	MARICO	83,670	2.4%	14.5	14.2x	11.1x
Cement	2,045	2,022	+23.80	+1.18%	7	97,472	1.4%	209.4	2.5%	23.3x	2.1x	BERGERPBL	76,203	2.1%	14.3	21.4x	4.7x
Services & Real Estate	990	994	-3.79	-0.38%	9	54,468	0.8%	312.7	3.7%	25.1x	0.4x	UPGDCL	75,476	2.1%	24.4	6.5x	1.8x
Engineering	2,496	2,453	+42.74	+1.74%	42	281,557	4.1%	840.0	9.9%	12.9x	0.9x	LHB	64,456	1.8%	152.3	18.0x	3.2x
Food & Allied	15,091	14,824	+267.47	+1.80%	21	276,130	4.0%	680.7	8.0%	16.0x	4.4x	RENATA	59,229	1.7%	63.6	21.1x	1.7x
IT	1,836	1,856	-19.61	-1.06%	11	24,221	0.3%	171.4	2.0%	20.4x	1.5x	UNILEVERCL	46,910	1.3%	1.2	80.7x	18.2x
Textile	1,074	1,088	-14.85	-1.36%	58	111,810	1.6%	597.0	7.0%	NM	0.7x	DUTCHBANGL	45,048	1.3%	36.4	10.4x	0.9x
Paper & Printing	4,499	4,553	-53.23	-1.17%	6	20,328	0.3%	221.3	2.6%	NM	1.0x	BXPHARMA	44,745	1.3%	101.8	7.0x	0.9x
Tannery	2,024	2,002	+22.02	+1.10%	6	22,550	0.3%	84.7	1.0%	69.3x	1.7x	ICB	43,103	1.2%	18.5	NM	1.0x
Jute	11,812	11,878	-65.78	-0.55%	3	2,600	0.0%	22.2	0.3%	NM	NM	EBL	39,576	1.1%	108.4	5.8x	0.8x
Ceramics	398	397	+1.90	+0.48%	5	17,877	0.3%	250.5	3.0%	NM	1.1x	PUBALIBANK	33,317	0.9%	7.3	4.2x	0.6x
Miscellaneous	4,104	4,086	+18.78	+0.46%	15	222,877	3.2%	512.3	6.0%	83.3x	1.8x	CITYBANK	33,011	0.9%	167.0	3.3x	0.7x
Corporate Bond**	15,033	15,011	+21.74	+0.14%	16	33,188	0.5%	1.2	0.0%	NM	NM	POWERGRID	31,709	0.9%	1.2	NM	0.2x
Treasury Bond**	2,105	2,085	+20.31	+0.97%	236	3,363,135	48.5%	1.2	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
UTTARAFIN	13.2	+10.0%	1.5	NM	0.2x	SQURPHARMA	108,958	7.7%	8.1x	1.4x	BRACBANK	63.7	-0.2%	246.3	9.3x	1.5x
DULAMIACOT	89.3	+10.0%	3.4	NM	NM	ISLAMIBANK	74,730	5.3%	15.6x	1.0x	KBPWBIL	124.0	+2.4%	203.1	NM	10.4x
GQBALLPEN	217.5	+8.9%	46.3	NM	1.6x	BEXIMCO	69,463	4.9%	NM	1.3x	BATBC	300.0	+3.4%	176.1	9.8x	3.1x
EASTERNINS	46.2	+8.2%	23.2	18.6x	0.9x	BATBC	50,233	3.6%	9.8x	3.1x	BSC	99.0	-2.1%	174.6	5.0x	1.0x
PHARMAID	612.3	+7.5%	65.6	36.0x	4.6x	WALTONHIL	46,773	3.3%	10.7x	1.2x	CITYBANK	21.7	+1.4%	167.0	3.3x	0.7x
MONNOAGML	362.0	+7.04%	46.3	NM	3.2x	BRACBANK	46,489	3.3%	9.3x	1.5x	ASIATICLAB	45.4	+2.3%	154.7	18.8x	0.8x
DUTCHBANGL	46.6	+6.9%	36.4	10.4x	1x	GP	44,708	3.2%	14.2x	7.4x	ORIONINFU	347.6	+3.1%	153.2	NM	22.1x
ISLAMIBANK	45.3	+4.9%	80.9	15.6x	1.0x	RENATA	32,968	2.3%	21.1x	1.7x	LHB	55.5	+1.8%	152.3	18.0x	3.2x
FIRSTSBANK	4.4	+4.8%	17.6	NM	0.4x	BXPHARMA	23,409	1.7%	7.0x	0.9x	SPCERAMICS	22.0	+3.3%	149.3	NM	0.7x
PRIMEBANK	27.2	+4.6%	137.2	3.9x	0.8x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	PRIMEBANK	27.2	+4.6%	137.2	3.9x	0.8x
						CITYBANK	21,020	1.5%	3.3x	0.7x						
						LHB	20,953	1.5%	18.0x	3.2x						
						OLYMPIC	20,496	1.5%	17.1x	2.6x						
						ALARABANK	18,282	1.3%	35.6x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EIL	35.6	-9.9%	25.3	29.4x	1.8x	BEACONPHAR	17,838	1.3%	31.2x	4.2x	BRACBANK	63.8	62.2	3.0	450	28.55
SEMLLECMF	9.4	-9.6%	72.1	NM	1x	PRIMEBANK	16,142	1.1%	3.9x	0.8x	GP	278.0	278.0	1.0	60	16.68
TALLUSPIN	5.4	-6.9%	0.9	NM	0.4x	ROBI	14,876	1.1%	18.7x	1.9x	MARICO	2,560.0	2,560.0	1.0	5	12.80
BIFC	6.3	-6.0%	0.5	NM	NM	UTTARABANK	13,699	1.0%	NM	0.8x	LOVELLO	103.7	86.5	9.0	128	12.21
APOLOISPAT	3.3	-5.7%	3.7	NM	0.2x	NBL	13,055	0.9%	NM	8.7x	EASTRN LUB	2,850.0	2,850.0	1.0	3	8.55
FAREASTFIN	3.4	-5.6%	0.7	NM	NM	BSRMLTD	12,852	0.9%	4.8x	0.5x	SHEPHERD	18.7	18.6	6.0	430	8.00
RSRMSTEEL	10.7	-5.3%	0.8	NM	0.2x						PEOPLESINS	32.8	32.8	1.0	195	6.40
PHOENIXFIN	3.7	-5.1%	1.2	NM	NM						BSC	102.5	102.5	1.0	61	6.25
REGENTTEX	3.7	-5.1%	0.5	NM	0.1x						AL-HAJTEX	132.0	131.0	5.0	42	5.49
DESCO	25.0	-4.9%	2.3	NM	0.7x						SEMLLECMF	10.4	10.4	1.0	420	4.37

* 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
BRACBANK	63.8	62.2	28.6	450	3
GP	278.0	278.0	16.7	60	1
MARICO	2,560.0	2,560.0	12.8	5	1
LOVELLO	103.7	86.5	12.2	128	9
EASTRNLUB	2,850.0	2,850.0	8.6	3	1
SHEPHERD	18.7	18.6	8.0	430	6
PEOPLESINS	32.8	32.8	6.4	195	1
BSC	102.5	102.5	6.3	61	1
AL-HAJTEX	132.0	131.0	5.5	42	5
SEMLLECMF	10.4	10.4	4.4	420	1
DBH	38.5	38.5	3.9	100	1
GOLDENSON	13.0	13.0	2.6	200	1
AMANFEED	25.0	25.0	2.4	94	1
BBSCABLES	17.5	17.5	2.2	124	1
CITYBANK	19.5	19.5	2.0	100	1
RAHIMAFOOD	125.3	125.3	1.9	15	1
DGIC	25.8	25.8	1.8	70	2
CONFIDCEM	60.5	60.5	1.1	18	1
UTTARABANK	21.6	21.6	1.0	48	1
BEXIMCO	99.6	99.4	1.0	10	2
DSHGARME	132.1	132.1	0.9	7	1
AGNISYSL	27.4	27.4	0.9	33	1
Total			133.5		48

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ISLAMICFIN		0.0%	0.0%	Record Date	28-Jul-25
ASIAINS		0.0%	10.0%	Record Date	29-Jul-25
POPULARLIF		0.0%	20.0%	Record Date	29-Jul-25
NHFIL		0.0%	10.0%	Record Date	30-Jul-25
UNIONCAP		0.0%	0.0%	Record Date	30-Jul-25
GLOBALINS		0.0%	10.0%	Record Date	30-Jul-25
SUNLIFEINS		0.0%	0.0%	Record Date	31-Jul-25
GIB		0.0%	0.0%	Record Date	31-Jul-25

Important DSE News
RUPALIBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.07 for April-June 2025 as against Tk. 0.42 (restated) for April-June 2024; Consolidated EPS was Tk. 0.20 for January-June 2025 as against Tk. 0.89 (restated) for January-June 2024. Consolidated NOCFPS was Tk. 139.11 for January-June 2025 as against Tk. 3.69 (restated) for January-June 2024. Consolidated NAV per share was Tk. 35.19 as on June 30, 2025 and Tk. 34.97 (restated) as on December 31, 2024. Diluted Consolidated EPS (considering share money deposit) was Tk. 0.03 for April-June 2025 as against Tk. 0.18 for April-June 2024; Diluted Consolidated EPS (considering share money deposit) was Tk. 0.09 for January-June 2025 as against Tk. 0.37 for January-June 2024. Diluted Consolidated NOCFPS (considering share money deposit) was Tk. 58.12 for January-June 2025 as against Tk. 1.54 for January-June 2024. Diluted Consolidated NAV per share (considering share money deposit) was Tk. 14.70 as on June 30, 2025 and Tk. 14.61 as on December 31, 2024.

RAKCERAMIC

The Company will be placed in 'A' category from existing 'Z' category with effect from July 22, 2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2024.

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