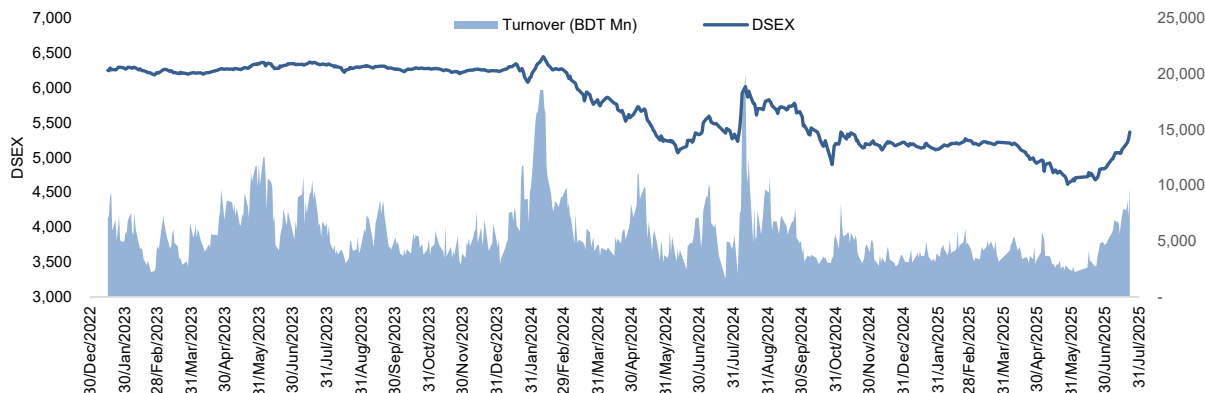


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.77%) gained 93.37 points and closed at 5,363.95. The blue-chip index DS30 (+2.77%), the Shariah-based index DSES (+1.45%), and the large-cap index CDSET (+2.13%) closed at 2,086.48, 1,178.46, and 1,103.90 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 3.83% followed by Telecommunication (+2.87%), Fuel & Power (+2.84%), Bank (+2.27%), NBFI (+2.00%), Pharmaceutical (+1.41%), and Engineering (-0.42%), respectively. Block trades contributed 3.4% of the overall market turnover. British American Tobacco Bangladesh Company Limited (+5.1%) was the most traded share with a turnover of BDT 356 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,363.95	5,270.57	+93.37	+1.77%	+2.8%
DS30	2,086.48	2,030.16	+56.31	+2.77%	+7.6%
DSES	1,178.46	1,161.65	+16.81	+1.45%	+0.8%
CDSET	1,103.90	1,080.84	+23.06	+2.13%	+3.5%

	Advanced	Declined	Unchanged	Total
All Category	218	102	79	399
A Category (Equity)	143	43	34	220
B Category (Equity)	37	33	13	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	38	26	32	96
Mutual Funds	13	9	14	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,083,481	7,028,988	+0.8%
	Mn USD	58,144	57,697	
Turnover	Mn BDT	9,865	7,223	+36.6%
	Mn USD	81	59	
Volume	Mn Shares	368	238	+54.4%
No. of Trade		244,350	207,628	+17.7%

* Average Interbank Exchange Rate is BDT 121.83 as of Jul 23, 2025

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Figure: Sectorial Turnover (BDT Mn)

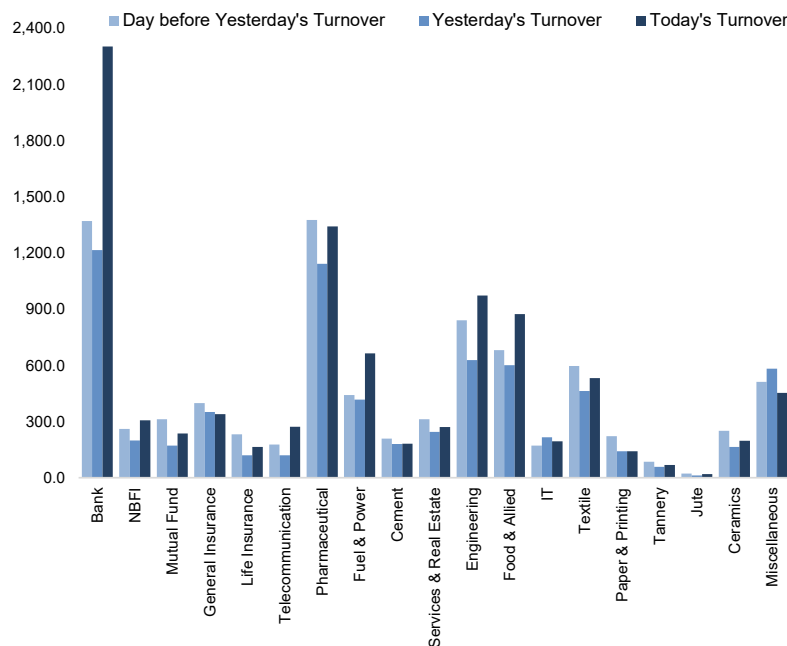
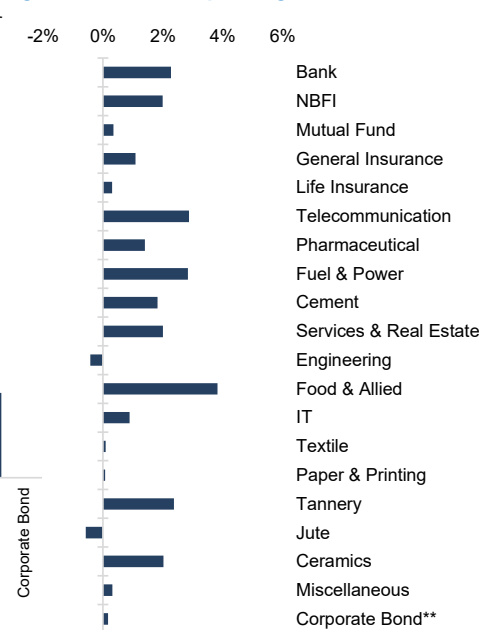


Figure: Sectorial Mcap Change



Market PE 15.4x

Market PB 1.2x

* 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	1,536	1,501	+34.10	+2.27%	36	726,561	10.3%	2,302.9	24.2%	46.7x	0.8x	GP	436,552	11.9%	154.7	14.8x	7.7x
NBFI	1,100	1,078	+21.53	+2.00%	23	104,805	1.5%	305.9	3.2%	NM	NM	SQURPHARMA	196,349	5.4%	208.3	8.4x	1.5x
Mutual Fund	647	645	+2.24	+0.35%	37	29,749	0.4%	235.6	2.5%	NM	0.6x	BATBC	177,444	4.9%	356.0	10.7x	3.4x
General Insurance	2,655	2,626	+28.58	+1.09%	43	75,758	1.1%	339.7	3.6%	12.7x	1.1x	WALTONHIL	139,226	3.8%	46.6	10.8x	1.2x
Life Insurance	1,738	1,733	+5.29	+0.31%	15	46,226	0.7%	163.7	1.7%	NM	NM	ROBI	137,758	3.8%	81.8	19.1x	2.0x
Telecommunication	5,119	4,976	+142.88	+2.87%	3	600,233	8.5%	272.8	2.9%	15.8x	4.2x	BRACBANK	129,211	3.5%	336.4	9.5x	1.6x
Pharmaceutical	3,062	3,020	+42.44	+1.41%	34	580,558	8.2%	1,341.8	14.1%	13.4x	1.6x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,173	1,140	+32.34	+2.84%	23	310,605	4.4%	664.7	7.0%	19.6x	0.7x	MARICO	85,689	2.3%	16.1	14.5x	11.4x
Cement	2,113	2,075	+37.80	+1.82%	7	100,706	1.4%	181.2	1.9%	24.1x	2.2x	UPGDCL	79,302	2.2%	20.0	6.8x	1.9x
Services & Real Estate	1,010	990	+19.85	+2.01%	9	55,533	0.8%	270.1	2.8%	25.5x	0.4x	BERGERPBL	78,290	2.1%	28.3	21.9x	4.8x
Engineering	2,536	2,546	-10.73	-0.42%	42	286,035	4.1%	973.0	10.2%	13.1x	0.9x	LHB	65,966	1.8%	101.2	18.4x	3.3x
Food & Allied	16,099	15,505	+593.72	+3.83%	21	294,560	4.2%	873.1	9.2%	17.0x	4.7x	RENATA	60,479	1.7%	86.5	21.5x	1.7x
IT	1,864	1,848	+16.47	+0.89%	11	24,589	0.3%	194.2	2.0%	20.7x	1.5x	BXPHARMA	48,537	1.3%	199.1	7.6x	1.0x
Textile	1,071	1,070	+0.93	+0.09%	58	111,521	1.6%	532.1	5.6%	NM	0.7x	UNILEVERCL	48,080	1.3%	1.8	82.7x	18.6x
Paper & Printing	4,467	4,464	+3.23	+0.07%	6	20,183	0.3%	141.0	1.5%	NM	1.0x	DUTCHBANGL	46,305	1.3%	47.7	10.7x	0.9x
Tannery	2,101	2,052	+48.75	+2.38%	6	23,411	0.3%	68.2	0.7%	72.0x	1.7x	ICB	43,623	1.2%	14.8	NM	1.0x
Jute	11,818	11,886	-68.61	-0.58%	3	2,601	0.0%	19.8	0.2%	NM	NM	EBL	41,810	1.1%	209.9	6.2x	0.8x
Ceramics	429	421	+8.51	+2.02%	5	19,261	0.3%	197.5	2.1%	NM	1.2x	PUBALIBANK	35,399	1.0%	28.3	4.5x	0.6x
Miscellaneous	4,174	4,160	+13.26	+0.32%	15	226,645	3.2%	452.9	4.8%	84.7x	1.8x	CITYBANK	35,292	1.0%	347.8	3.5x	0.7x
Corporate Bond**	14,977	14,952	+25.14	+0.17%	16	33,066	0.5%	2.4	0.0%	NM	NM	PRIMEBANK	33,657	0.9%	145.9	4.1x	0.8x
Treasury Bond**	2,114	2,119	-5.12	-0.24%	236	3,367,900	47.8%	2.2	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	15.9	+9.7%	1.0	NM	0.2x	SQURPHARMA	108,958	7.7%	8.4x	1.5x	BATBC	328.6	+5.1%	356.0	10.7x	3.4x
COPPERTECH	22.8	+9.6%	70.1	27.1x	1.6x	ISLAMIBANK	74,730	5.3%	15.5x	1.0x	CITYBANK	23.2	+3.1%	347.8	3.5x	0.7x
BANKASIA	17.3	+9.5%	130.2	6.6x	0.6x	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	64.9	+2.9%	336.4	9.5x	1.6x
MTB	12.3	+7.9%	47.9	4.1x	0.5x	BATBC	50,233	3.6%	10.7x	3.4x	EBL	26.2	+4.4%	209.9	6.2x	0.8x
DOREENPWR	26.4	+7.3%	49.9	10.0x	0.5x	WALTONHIL	46,773	3.3%	10.8x	1.2x	SQURPHARMA	221.5	+1.1%	208.3	8.4x	1.5x
NCCBANK	11.4	+6.54%	45.9	5.2x	0.5x	BRACBANK	46,489	3.3%	9.5x	1.6x	BSC	107.2	+1.0%	200.8	5.4x	1.1x
NPOLYMER	31.5	+6.4%	38.6	23.7x	1x	GP	44,708	3.2%	14.8x	7.7x	BXPHARMA	108.8	+5.5%	199.1	7.6x	1.0x
DHAKABANK	11.9	+6.3%	119.6	9.3x	0.5x	RENATA	32,968	2.3%	21.5x	1.7x	UTTARABANK	21.7	+2.4%	163.3	NM	0.8x
MERCANBANK	8.8	+6.0%	41.6	21.0x	0.4x	BXPHARMA	23,409	1.7%	7.6x	1.0x	GP	323.3	+3.2%	154.7	14.8x	7.7x
TITASGAS	21.4	+5.9%	28.1	NM	0.2x	PUBALIBANK	22,905	1.6%	4.5x	0.6x	KBPPWBIL	129.2	+1.3%	146.5	NM	10.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.5x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CAPMBDBLMF	9.5	-6.9%	7.6	NM	1.1x	LHB	20,953	1.5%	18.4x	3.3x	BANKASIA	16.7	16.7	6.0	7,000	116.90
DULAMIACOT	87.5	-5.8%	1.6	NM	NM	OLYMPIC	20,496	1.5%	18.0x	2.8x	MARICO	2,720.0	2,600.0	6.0	29	79.16
DSHGARME	124.4	-5.3%	25.1	NM	6.7x	ALARABANK	18,282	1.3%	35.8x	0.8x	SOUTHEASTB	8.0	8.0	2.0	5,259	42.07
MEGHNAPET	25.6	-3.8%	0.2	NM	0.4x	BEACONPHAR	17,838	1.3%	32.6x	4.4x	DONINAGE	11.5	11.5	3.0	1,000	11.50
RAHIMAFOD	119.8	-3.5%	53.7	NM	13.0x	PRIMEBANK	16,142	1.1%	4.1x	0.8x	UCB	10.6	10.6	1.0	930	9.86
METROSPIN	11.2	-3.4%	2.9	NM	2.3x	ROBI	14,876	1.1%	19.1x	2.0x	BSC	102.8	102.8	1.0	60	6.17
STYLECRAFT	70.3	-3.2%	20.1	NM	12.1x	UTTARABANK	13,699	1.0%	NM	0.8x	SIMTEX	16.1	16.0	3.0	368	5.90
ARAMITCEM	13.4	-2.9%	1.7	NM	NM	NBL	13,055	0.9%	NM	NM	ACMEPL	15.7	15.7	1.0	330	5.18
NEWLINE	7.1	-2.7%	4.1	NM	0.3x	BSRMLTD	12,852	0.9%	4.9x	0.5x	EIL	36.0	36.0	1.0	140	5.04
WATACHEM	124.7	-2.7%	4.5	NM	2.0x	* 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					SPCERAMICS	24.0	23.8	3.0	200	4.78

* 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
BANKASIA	16.7	16.7	116.9	7,000	6
MARICO	2,720.0	2,600.0	79.2	29	6
SOUTHEASTB	8.0	8.0	42.1	5,259	2
DOMINAGE	11.5	11.5	11.5	1,000	3
UCB	10.6	10.6	9.9	930	1
BSC	102.8	102.8	6.2	60	1
SIMTEX	16.1	16.0	5.9	368	3
ACMEPL	15.7	15.7	5.2	330	1
EIL	36.0	36.0	5.0	140	1
SPCERAMICS	24.0	23.8	4.8	200	3
MONNOCERA	93.5	90.0	4.3	47	4
IDLC	38.5	38.5	4.0	105	1
LOVELLO	102.5	99.1	3.9	39	2
KBPPWBIL	120.1	114.8	3.0	25	2
QUASEMIND	43.5	37.0	2.8	72	3
PRIMEBANK	28.2	28.2	2.8	100	1
SINGERBD	129.0	129.0	2.8	22	1
CITYBANK	24.6	24.6	2.5	100	1
PTL	48.8	45.0	2.3	50	2
BEACONPHAR	106.2	106.0	2.2	21	2
ACI	195.0	195.0	2.0	10	2
IBP	15.8	15.8	1.1	70	1
Total			330.5		63

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PRIMELIFE		0.0%	0.0%	Record Date	4-Aug-25
DHAKABANK		5.0%	0.0%	Record Date	7-Aug-25
FASFIN		0.0%	0.0%	Record Date	10-Aug-25
GP		0.0%	110.0%	Record Date	13-Aug-25

Important DSE News

TAKAFULINS

(Q2 Un-audited): EPS was Tk. 0.34 for April-June 2025 as against Tk. 0.32 for April-June 2024; EPS was Tk. 0.74 for January-June 2025 as against Tk. 0.70 for January-June 2024. NOCFPS was Tk. 0.85 for January-June 2025 as against Tk. (1.35) for January-June 2024. NAV per share was Tk. 19.65 as on June 30, 2025 and Tk. 19.11 as on December 31, 2024.

RAKCERAMIC

(Q2 Un-audited): Consolidated EPS was Tk. (0.43) for April-June 2025 as against Tk. (0.02) for April-June 2024; Consolidated EPS was Tk. (0.49) for January-June 2025 as against Tk. 0.09 for January-June 2024. Consolidated NOCFPS was Tk. 0.16 for January-June 2025 as against Tk. (0.78) for January-June 2024. Consolidated NAV per share was Tk. 15.73 as on June 30, 2025 and Tk. 17.38 as on June 30, 2024.

NBL

(Q2 Un-audited): Consolidated EPS was Tk. (2.37) for April-June 2025 as against Tk. (0.51) (restated) for April-June 2024; Consolidated EPS was Tk. (3.06) for January-June 2025 as against Tk. (1.99) (restated) for January-June 2024. Consolidated NOCFPS was Tk. (9.26) for January-June 2025 as against Tk. (7.95) for January-June 2024. Consolidated NAV per share was Tk. (1.19) as on June 30, 2025 and Tk. 5.32 (restated) as on June 30, 2024.

ISNLTD

The Company has informed that the Board of Directors has elected Mr. Sajedur Seraj as the Chairman of the Board of Directors of the company with immediate effect.

ARAMITCEM

The company has informed that the management has decided to suspend the production of its product "Camel Brand Cement" due to current financial performance of the Company, shortage of raw materials, severe fund crisis, limitations to opening L/C and market condition that affected the Company's production line with retrospective effect from 10th July 2025.

KPCL

The company has informed that an "Asset Purchase Agreement" has been executed between Khulna Power Company Ltd. (KPCL) and Aksa Enerji Uretim A.S., Turkey for sale/re-export of KPC Unit II 115MW plant, located at Khalishpur, Khulna, Bangladesh.

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