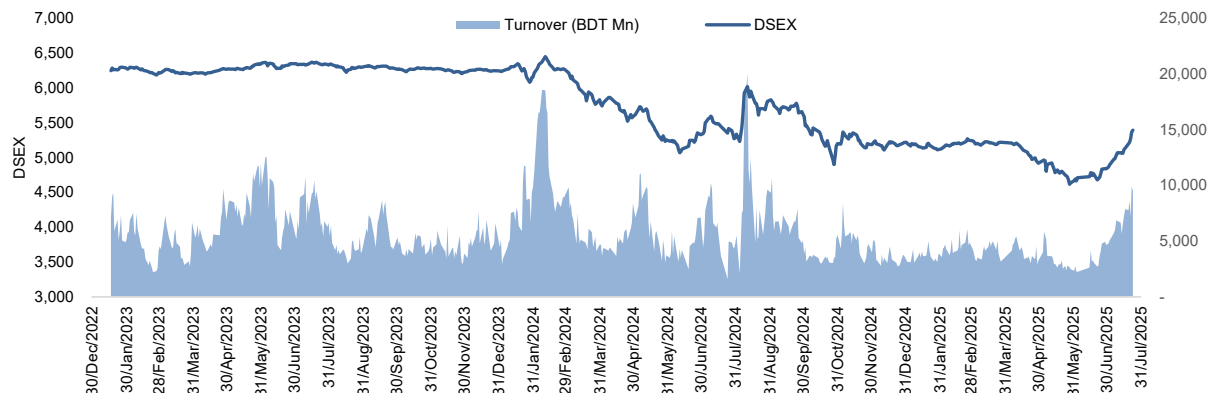


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.52%) gained 28.1 points and closed at 5,392.04. The blue-chip index DS30 (+0.16%), the Shariah-based index DSES (-0.49%), and the large-cap index CDSET (+0.48%) closed at 2,089.77, 1,172.69, and 1,109.24 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.44% followed by Pharmaceutical (-0.52%), Engineering (-0.50%), Telecommunication (-0.20%), Fuel & Power (-0.10%), Bank (+2.38%), and NBFi (+3.05%), respectively. Block trades contributed 2.0% of the overall market turnover. The City Bank Ltd. (+2.2%) was the most traded share with a turnover of BDT 363 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,392.04	5,363.95	+28.10	+0.52%	+3.4%
DS30	2,089.77	2,086.48	+3.29	+0.16%	+7.7%
DSES	1,172.69	1,178.46	-5.76	-0.49%	+0.3%
CDSET	1,109.24	1,103.90	+5.34	+0.48%	+4.0%

	Advanced	Declined	Unchanged	Total
All Category	161	171	66	398
A Category (Equity)	104	84	32	220
B Category (Equity)	24	47	11	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	33	40	23	96
Mutual Funds	10	6	20	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	4	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,080,070	7,083,481	-0.0%
	Mn USD	57,969	57,997	
Turnover	Mn BDT	9,518	9,865	-3.5%
	Mn USD	78	81	
Volume	Mn Shares	335	368	-9.0%
No. of Trade		245,308	244,350	+0.4%

* Average Interbank Exchange Rate is BDT 122.13 as of Jul 24, 2025

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Figure: Sectorial Turnover (BDT Mn)

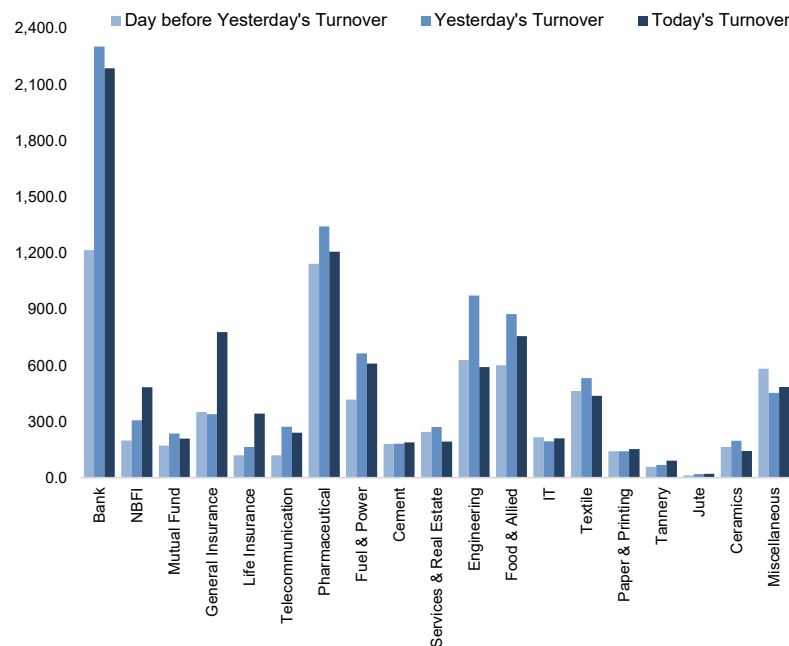
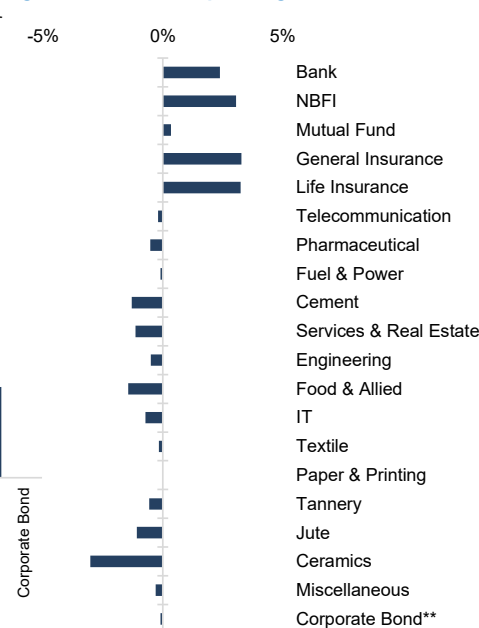


Figure: Sectorial Mcap Change



Market PE 15.5x

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	1,572	1,536	+36.56	+2.38%	36	743,861	10.6%	2,185.6	23.4%	47.8x	0.8x	GP	433,581	11.8%	86.2	14.7x	7.6x
NBFI	1,133	1,100	+33.59	+3.05%	23	108,006	1.5%	482.8	5.2%	NM	NM	SQURPHARMA	197,235	5.4%	175.8	8.4x	1.5x
Mutual Fund	649	647	+2.23	+0.34%	37	29,852	0.4%	208.5	2.2%	NM	0.6x	BATBC	173,772	4.7%	273.7	10.5x	3.3x
General Insurance	2,742	2,655	+87.13	+3.28%	43	78,244	1.1%	777.2	8.3%	13.1x	1.2x	ROBI	140,377	3.8%	129.1	19.4x	2.0x
Life Insurance	1,795	1,738	+56.58	+3.26%	15	47,731	0.7%	342.9	3.7%	NM	NM	WALTONHIL	139,256	3.8%	30.3	10.8x	1.2x
Telecommunication	5,109	5,119	-10.18	-0.20%	3	599,040	8.5%	240.1	2.6%	15.8x	4.2x	BRACBANK	136,976	3.7%	302.9	10.1x	1.6x
Pharmaceutical	3,046	3,062	-15.94	-0.52%	34	577,536	8.2%	1,207.0	12.9%	13.3x	1.6x	BEXIMCO	103,850	2.8%	0.0	NM	1.3x
Fuel & Power	1,171	1,173	-1.13	-0.10%	23	310,306	4.4%	610.1	6.5%	19.5x	0.7x	MARICO	85,072	2.3%	31.6	14.4x	11.3x
Cement	2,086	2,113	-27.48	-1.30%	7	99,397	1.4%	189.3	2.0%	22.9x	2.2x	UPGDCL	79,012	2.2%	19.0	6.8x	1.9x
Services & Real Estate	998	1,010	-11.48	-1.14%	9	54,902	0.8%	193.3	2.1%	25.3x	0.4x	BERGERPBL	78,290	2.1%	0.0	21.9x	4.8x
Engineering	2,523	2,536	-12.63	-0.50%	42	284,611	4.0%	590.3	6.3%	13.1x	0.9x	LHB	65,734	1.8%	111.6	17.5x	3.5x
Food & Allied	15,867	16,099	-231.89	-1.44%	21	290,317	4.1%	755.9	8.1%	16.8x	4.6x	RENATA	60,824	1.7%	101.3	21.6x	1.8x
IT	1,851	1,864	-13.50	-0.72%	11	24,411	0.3%	209.9	2.3%	20.5x	1.5x	UNILEVERCL	47,960	1.3%	0.8	82.5x	18.6x
Textile	1,069	1,071	-1.74	-0.16%	58	111,340	1.6%	437.6	4.7%	NM	0.7x	BXPHARMA	47,243	1.3%	117.4	7.4x	1.0x
Paper & Printing	4,467	4,467	-0.31	-0.01%	6	20,181	0.3%	153.2	1.6%	NM	1.0x	DUTCHBANGL	46,112	1.3%	32.7	10.6x	0.9x
Tannery	2,089	2,101	-12.01	-0.57%	6	23,277	0.3%	91.3	1.0%	71.5x	1.7x	ICB	44,057	1.2%	20.5	NM	1.0x
Jute	11,689	11,818	-128.39	-1.09%	3	2,573	0.0%	20.1	0.2%	NM	NM	EBL	41,651	1.1%	121.4	6.1x	0.8x
Ceramics	416	429	-12.98	-3.02%	5	18,678	0.3%	143.1	1.5%	NM	1.2x	CITYBANK	36,053	1.0%	362.8	3.6x	0.8x
Miscellaneous	4,161	4,174	-12.58	-0.30%	15	225,962	3.2%	484.3	5.2%	84.5x	1.8x	PUBALIBANK	35,269	1.0%	53.6	4.5x	0.6x
Corporate Bond**	14,963	14,977	-14.27	-0.10%	16	33,035	0.5%	1.4	0.0%	NM	NM	PRIMEBANK	33,657	0.9%	90.9	4.1x	0.8x
Treasury Bond**	2,108	2,114	-6.24	-0.30%	236	3,353,834	47.7%	2.6	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
PLFSL	2.2	+10.0%	4.1	NM	NM	SQURPHARMA	108,958	7.7%	8.4x	1.5x	CITYBANK	23.7	+2.2%	362.8	3.6x	0.8x
TILIL	47.7	+9.9%	46.9	10.7x	NM	ISLAMIBANK	74,730	5.3%	15.7x	1.0x	BRACBANK	68.8	+6.0%	302.9	10.1x	1.6x
BANKASIA	19.0	+9.8%	148.4	7.2x	0.7x	BEXIMCO	69,463	4.9%	NM	1.3x	BATBC	321.8	-2.1%	273.7	10.5x	3.3x
EIL	36.9	+9.8%	139.0	30.5x	1.9x	BATBC	50,233	3.6%	10.5x	3.3x	BSC	103.3	-3.6%	247.4	5.2x	1.0x
MTB	13.5	+9.8%	95.4	4.5x	0.6x	WALTONHIL	46,773	3.3%	10.8x	1.2x	SQURPHARMA	222.5	+0.5%	175.8	8.4x	1.5x
FIRSTFIN	3.4	+9.68%	1.2	NM	NM	BRACBANK	46,489	3.3%	10.1x	1.6x	IDLC	40.9	+7.3%	173.0	8.3x	0.9x
UTTARAFIN	17.4	+9.4%	2.2	NM	0x	GP	44,708	3.2%	14.7x	7.6x	KBPPWBIL	128.5	-0.5%	157.5	NM	10.7x
PRIMEINSUR	38.3	+9.1%	34.8	20.1x	1.7x	RENATA	32,968	2.3%	21.6x	1.8x	UTTARABANK	21.9	+0.9%	155.8	NM	0.8x
PRIMEFIN	4.8	+9.1%	5.6	NM	0.7x	BXPHARMA	23,409	1.7%	7.4x	1.0x	JAMUNABANK	19.5	+4.3%	148.9	6.2x	0.8x
PROGRESLIF	50.2	+8.9%	3.7	NM	NM	PUBALIBANK	22,905	1.6%	4.5x	0.6x	BANKASIA	19.0	+9.8%	148.4	7.2x	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.6x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
HEIDELBCEM	254.2	-4.9%	24.1	54.2x	3.3x	LHB	20,953	1.5%	17.5x	3.5x	KBPPWBIL	140.0	122.6	3.0	308	37.86
KEYACOSMET	4.8	-4.0%	3.0	NM	0x	OLYMPIC	20,496	1.5%	17.7x	2.7x	BRACBANK	65.2	65.2	1.0	402	26.21
RAKCERAMIC	23.0	-3.8%	21.6	NM	1.5x	ALARABANK	18,282	1.3%	37.0x	0.9x	BSC	106.2	106.2	1.0	200	21.24
BSC	103.3	-3.6%	247.4	5.2x	1.0x	BEACONPHAR	17,838	1.3%	31.8x	4.2x	ORIONINFU	374.0	365.0	11.0	43	16.04
NFML	10.8	-3.6%	2.6	NM	1.0x	PRIMEBANK	16,142	1.1%	4.1x	0.8x	PRIMEINSUR	35.1	35.1	1.0	300	10.53
SAMATALETH	67.9	-3.4%	11.8	NM	4.7x	ROBI	14,876	1.1%	19.4x	2.0x	ASIATICLAB	48.3	47.5	3.0	216	10.32
BSCPLC	134.1	-3.2%	24.8	19.2x	1.6x	UTTARABANK	13,699	1.0%	NM	0.8x	TILIL	44.3	42.0	5.0	167	7.26
SPCERAMICS	21.3	-3.2%	59.1	NM	0.7x	NBL	13,055	0.9%	NM	NM	EHL	83.0	83.0	1.0	77	6.39
MHSMML	15.4	-3.1%	12.9	18.6x	0.8x	BSRMLTD	12,852	0.9%	4.9x	0.5x	ADNTEL	81.5	76.0	3.0	69	5.54
NURANI	3.1	-3.1%	0.2	NM	0.3x	* 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					MONNOCERA	96.5	94.5	2.0	50	4.76

* 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
KBPPWBIL	140.0	122.6	37.9	308	3
BRACBANK	65.2	65.2	26.2	402	1
BSC	106.2	106.2	21.2	200	1
ORIONINFU	374.0	365.0	16.0	43	11
PRIMEINSUR	35.1	35.1	10.5	300	1
ASIATICLAB	48.3	47.5	10.3	216	3
TILIL	44.3	42.0	7.3	167	5
EHL	83.0	83.0	6.4	77	1
ADNTEL	81.5	76.0	5.5	69	3
MONNOCERA	96.5	94.5	4.8	50	2
PEOPLESINS	33.5	33.4	4.4	131	4
ACMEPL	15.4	15.4	4.1	264	1
DBH	39.3	39.3	3.9	100	1
APEXFOOT	242.8	242.8	3.4	14	1
RELIANCE1	17.9	17.9	3.2	178	1
MARICO	2,730.0	2,690.0	3.2	1	2
SPCERAMICS	23.9	23.8	3.1	131	2
FUWANGFOOD	17.2	17.2	2.5	147	1
EASTRNLUB	2,775.0	2,775.0	2.0	1	1
SBACBANK	9.1	9.1	1.8	200	1
SHEPHERD	17.8	17.8	1.8	100	1
FEKDIL	17.3	17.3	1.7	100	1
Total			191.4		61

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

LHB

(Q2 Un-audited): Diluted Consolidated EPS was Tk. 0.83 for April-June 2025 as against Tk. 0.69 for April-June 2024; Diluted Consolidated EPS was Tk. 2.03 for January-June 2025 as against Tk. 2.09 for January-June 2024. Consolidated NOCFPS was Tk. 1.64 for January-June 2025 as against Tk. 2.34 for January-June 2024. Consolidated NAV per share was Tk. 16.33 as on June 30, 2025 and Tk. 16.01 as on December 31, 2024.

SONALILIFE

The Board of Directors has recommended 10% Cash dividend for the year ended December 31, 2023. Date of AGM: 31.08.2025, Time: 11:30 AM, Venue: Hybrid System. Record Date: 17.08.2025. The Company has also reported EPS of Tk. 1.49, NAV per share of Tk. 35.60 and NOCFPS of Tk. 20.16 for the year ended December 31, 2023 as against Tk. 3.94, Tk. 55.28 and Tk. 70.49 respectively for the year ended December 31, 2022.

BIFC

(Q2 Un-audited): EPS was Tk. (1.47) for April-June 2025 as against Tk. (0.61) for April-June 2024; EPS was Tk. (3.12) for January-June 2025 as against Tk. (1.55) for January-June 2024. NOCFPS was Tk. (0.05) for January-June 2025 as against Tk. 0.26 for January-June 2024. NAV per share was Tk. (129.23) as on June 30, 2025 and Tk. (121.00) as on June 30, 2024.

EASTERNINS

(Q2 Un-audited): EPS was Tk. 1.69 for January-June 2025 as against Tk. 1.70 for January-June 2024. EPS was Tk. 1.07 for April-June 2025 as against Tk. 1.11 for April-June 2024. NOCFPS was Tk. 0.75 for January-June 2025 as against Tk. 0.51 for January-June 2024. NAV per share was Tk. 52.02 as on June 30, 2025 and Tk. 49.85 as on December 31, 2024. During the quarter ended on 30 June 2025, NOCFPS has been increased due to higher operating income and short payment of Re-Insurance Premium.

UTTARABANK

Mr. Asif Rahman, a Director of the Company has completed his buying of 1,000,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 03.06.2025.

DHAKABANK

Mr. A. T. M. Hayatuzzaman Khan, a Sponsor of the company, has further reported that he has received 10,341,318 shares of the company from his sister Ms. Zaheda Wahed Khan as per declaration disseminated by DSE on 21.07.2025.

ISLAMIBANK

The Company has informed that the Board of Directors of the company in its 367th Meeting held on 23rd July, 2025 has unanimously elected Professor Dr. M. Zubaidur Rahman as the Chairman of the Board of Directors of the company.

EASTRNLUB

The company has informed that in order to diversify of ELB PLC's business, the Board of Directors of ELB PLC has approved a draft copy of Deed of Agreement made between Eastern Lubricants Blenders PLC (ELB PLC) and Rock Energy Limited (REL), an authorized distributor of CASTROL Lubricants, in its 292nd meeting held on 23-07-2025 to work together and cooperate each other in selling and distributing 'CASTROL Lubricants' in government sector of Bangladesh.

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