

DSEX WENT UP BY 32.6 POINTS

Market closed positive today with decrease in turnover.

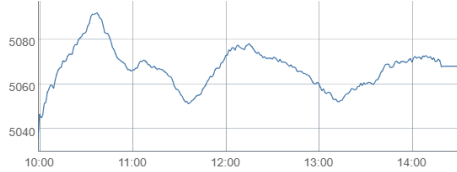
Broad index DSEX went up by 32.6 points

Paper & Printing, Tannery and Jute are the top three sectors that closed positive today while only Ceramics, Fuel & Power and Telecom sectors closed negative today.

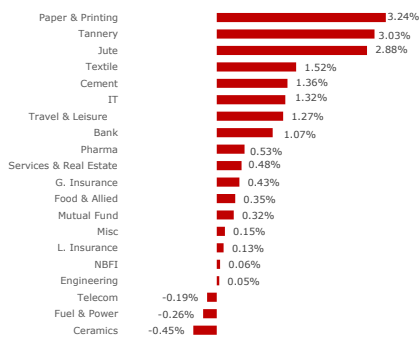
Turnover decreased by 1.7% to BDT 6,790mn (USD 55mn).

Bank sector dominated the turnover chart covering 14.1% of the total turnover.

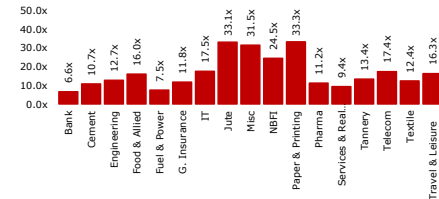
Intraday Performance of DSEX



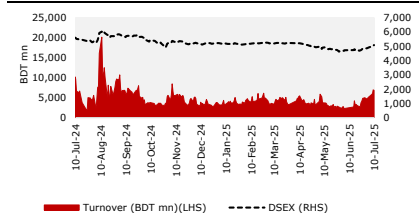
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,068.04	32.6	0.65%	5,216.44	-2.84%
DS30	1,908.62	14.4	0.76%	1,939.73	-1.60%
DSES	1,100.96	6.8	0.63%	1,168.90	-5.81%
S&P 500	6,225.52	(4.5)	-0.07%	5,881.63	5.85%
Nikkei 225	39,821.28	132.5	0.33%	39,894.54	-0.18%
FTSE 100	8,859.13	5.0	0.06%	8,132.56	8.93%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	6,790	6,906	-116	-1.68%	3,776
Turnover (USD mn)	55	56	-1	-1.68%	31
Volume (mn)	273	309	-36	-11.58%	165
Market Cap (BDT bn)	6,767	6,727	41	0.60%	
Market Cap (USD bn)	55	55	0	0.60%	
Market P/E (x)	11.0				
Particulars	Winner	Loser	Unchanged		
Market Breadth	273	78	46		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	689,621	20.34%	1.1%	958.3	14.11%
Telecom	559,670	16.51%	-0.2%	71.6	1.05%
Pharma	537,826	15.86%	0.5%	860.1	12.67%
Fuel & Power	291,865	8.61%	-0.3%	352.9	5.20%
Engineering	267,423	7.89%	0.0%	579.9	8.54%
Food & Allied	264,114	7.79%	0.4%	745.2	10.97%
Misc	226,296	6.68%	0.2%	307.0	4.52%
Textile	109,210	3.22%	1.5%	809.1	11.92%
NBFI	94,385	2.78%	0.1%	103.4	1.52%
Cement	88,741	2.62%	1.4%	218.5	3.22%
G. Insurance	73,694	2.17%	0.4%	281.4	4.14%
L. Insurance	44,508	1.31%	0.1%	143.6	2.12%
Mutual Fund	29,195	0.86%	0.3%	231.6	3.41%
IT	23,850	0.70%	1.3%	261.4	3.85%
Tannery	21,876	0.65%	3.0%	110.4	1.63%
Travel & Leisure	20,140	0.59%	1.3%	161.4	2.38%
Paper & Printing	19,232	0.57%	3.2%	305.9	4.50%
Ceramics	17,243	0.51%	-0.5%	164.1	2.42%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BRACBANK	58.70	4.08%	220.33	3.79	6.46
BEACHHATCH	50.20	-1.38%	158.75	3.13	8.22
LHB	48.70	3.40%	149.57	3.11	10.15
SEAPPEARL	59.90	3.28%	145.30	2.44	n/a
LOVELLO	99.50	4.96%	129.23	1.32	32.73

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
RAHIMTEXT	154.20	9.99%	13.35	0.09	144.56
DSHGARME	123.60	9.96%	50.00	0.41	193.13
GEMINISEA	137.30	9.93%	26.91	0.21	n/a
FORTUNE	16.90	9.74%	35.52	2.12	42.25
RAHIMAFOD	102.00	9.68%	70.52	0.72	294.23

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MIDLANDBNK	26.40	-6.71%	123.14	4.57	41.25
GHCL	20.30	-3.79%	2.17	0.11	n/a
HEIDELBCEM	234.30	-3.70%	11.74	0.05	16.83
SALAMCRST	21.50	-3.59%	44.77	2.04	57.59
IBP	13.60	-3.55%	79.70	5.80	n/a

DSNEWS

Semi-Annual Rebalancing of DS30, Quarterly IPO Addition for DSEX & DSMEIX

Dhaka Stock Exchange PLC (DSE) is pleased to announce that the Index Committee of DSE has completed the semi-annual rebalancing of the DS30 (DSE Bangladesh 30 Index) and quarterly review for IPO Addition of DSEX (DSE Bangladesh Broad Index) & DSMEIX (DSE SME Growth Index) for July 2025, conducted in accordance with the index methodology and guidelines approved by the Exchange. The changes have been made based on the market capitalization, liquidity and other relevant criteria during the review period. The revised composition of the index will be effective from July 20, 2025. A summary of the rebalancing results is given below: DS30: Three (3) new companies are being included in the DS30; whereas three (3) companies are being dropped from the existing list of DS30. Additions to the Index: 1. Heidelberg Materials Bangladesh PLC. (HEIDELBCEM), 2. Taufika Foods and Lovello Ice-cream PLC (LOVELLO), 3. Linde Bangladesh Limited (LINDEBD). Removals from the Index: 1. Meghna Petroleum Ltd. (MPETROLEUM), 2. Bangladesh Steel Re-Rolling Mills Limited (BSRMLTD), 3. Power Grid Company of Bangladesh Ltd. (POWERGRID). DSEX & DSMEIX: There was no listing (debut trading) of new companies either in the Main Market or in SME Market of DSE during the quarterly review period of DSE Bangladesh Broad Index (DSEX) & DSE SME Growth Index (DSMEIX) for IPO addition in July 2025. As such, there would be no addition to the existing constituents list of DSEX & DSMEIX for July 2025.

CLICL

Appointment of Chief Executive Officer

The company has informed that the Board of Directors has appointed Mr. Muhammad Asif Shams FLMI as the Chief Executive Officer of the company with effect from July 09, 2025.

NCCBANK

Buy Declaration of a Director

Mr. Syed Asif Nizamuddin, a Director of the Company, has expressed his intention to buy 1,000,000 shares of the company at prevailing market price in the Public and/or Block Market through Dhaka Stock Exchange PLC. within next 30 (thirty) working days.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ADNTEL	75.1	73.2	2	20020	1.484
AL-HAJTEX	124	123	13	347407	42.96
ANWARGALV	62.5	62.5	1	10000	0.625
ASIATICLAB	45.5	41.4	2	70000	2.98
BEACONPHAR	103	103	1	11730	1.208
BEXGSUKUK	48.5	48.5	1	20000	0.97
BRACBANK	57.7	57.7	1	135713	7.831
CAPMBDBLMF	9.5	9.4	3	724000	6.816
DGIC	24.5	24.5	1	60000	1.47
DSHGARM	112	112	1	4800	0.538
EIL	48.8	47.8	7	137970	6.703
EMERALDOIL	20.1	20.1	1	50000	1.005
FINEFOODS	240	222	5	46001	10.7
GHAIL	13	13	1	40000	0.52
HAKKANIPUL	70	59.5	2	18185	1.169
HAMI	110	110	1	10000	1.1
JAMUNABANK	15.8	15.8	1	145402	2.297
LEGACYFOOT	61.7	61.7	1	10000	0.617
LOVELLO	88.5	88	3	45290	3.994
MONNOAGML	300	300	1	2790	0.837
MONNOCERA	85	85	1	13300	1.131
NTLTUBES	87	85.5	3	135000	11.64
PRAGATILIF	94	94	1	22700	2.134
PTL	43.9	43.9	1	13150	0.577
RAHIMAFOD	97.1	96	3	24365	2.349
ROBI	27.9	27.9	1	25000	0.698
SEMLLECMF	12	12	1	800000	9.6
SHARPIND	19	19	1	300000	5.7
SPCL	41	41	1	60000	2.46
SQURPHARMA	191	191	1	41544	7.935
TECHNODRUG	32.5	32.5	1	75000	2.438
TILIL	46.4	46.4	1	45000	2.088
UTTARABANK	22.9	22.9	1	42649	0.977

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We calculate our target price by weighting DCF, DDM, SOTP, asset-based and other relative valuation methods, and applying appropriate premiums/ discounts and/or other relevant adjustments.

Expected absolute returns are calculated as the % of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

Recommendation Type	Holding period (if not otherwise mentioned)	Absolute Return Potential
Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between -5% and +15%
Underweight	12 Months	Less than -5%

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Bashundhara +880 1718 106 217	Mirpur-1 +880 1713 205 723	Mirpur-12 +880 1911 197 188	Banasree +880 1701 205 075	Uttara +880 1913 128 156

Branch Offices

Chattogram +880 1701 205 038	Sylhet +880 1713 205 760
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Digital Booths

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Feni +880 1324 243 210	Khatungonj +880 1713 205 742	Chawkbazar +880 1817 206 965	Madhobdi +880 1324 243 156	
	Narayangonj +880 1324 243 207	Agrabad +880 1324 243 198		