

DSEX WENT DOWN BY 4.6 POINTS

Market closed flat today with decrease in turnover.

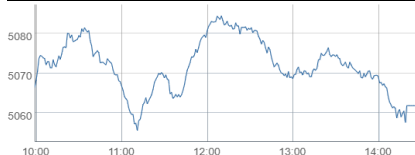
Broad index DSEX went down by 4.6 points.

G. Insurance, Ceramics and Mutual Fund are the top three sectors that closed positive today while Jute, Paper & Printing and NBFI are the top three sectors that closed negative today.

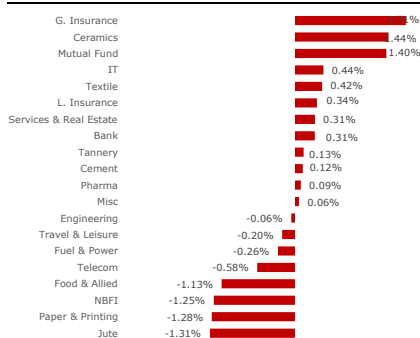
Turnover decreased by 15.3% to BDT 5,644mn (USD 46mn).

Bank sector dominated the turnover chart covering 14.9% of the total turnover.

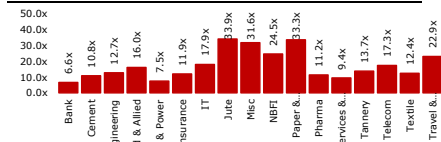
Intraday Performance of DSEX



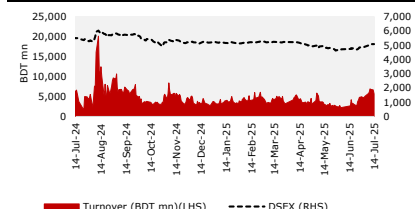
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,061.83	(4.6)	-0.09%	5,216.44	-2.96%
DS30	1,900.02	(8.5)	-0.45%	1,939.73	-2.05%
DSES	1,104.02	1.0	0.09%	1,168.90	-5.55%
S&P 500	6,259.75	(20.7)	-0.33%	5,881.63	6.43%
Nikkei 225	39,459.62	(110.1)	-0.28%	39,894.54	-1.09%
FTSE 100	8,977.75	36.6	0.41%	8,132.56	10.39%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	5,644	6,660	-1,016	-15.26%	3,822
Turnover (USD mn)	46	54	-8	-15.26%	32
Volume (mn)	221	268	-47	-17.50%	167
Market Cap (BDT bn)	6,804	6,767	37	0.54%	
Market Cap (USD bn)	55	55	0	0.54%	
Market P/E (x)	11.0				
Particulars	Galner	Loser	Unchanged		
Market Breadth	156	163	76		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	685,337	20.24%	0.3%	842.3	14.93%
Telecom	556,811	16.45%	-0.6%	62.3	1.10%
Pharma	539,287	15.93%	0.1%	652.8	11.57%
Fuel & Power	290,522	8.58%	-0.3%	292.5	5.18%
Engineering	266,597	7.88%	-0.1%	460.2	8.15%
Food & Allied	263,825	7.79%	-1.1%	629.1	11.15%
Misc	227,206	6.71%	0.1%	294.8	5.22%
Textile	109,227	3.23%	0.4%	663.9	11.76%
NBFI	94,330	2.79%	-1.2%	76.4	1.35%
Cement	89,525	2.64%	0.1%	114.9	2.04%
G. Insurance	74,722	2.21%	1.7%	356.9	6.32%
L. Insurance	44,213	1.31%	0.3%	131.4	2.33%
Travel & Leisure	36,463	1.08%	-0.2%	108.8	1.93%
Mutual Fund	29,691	0.88%	1.4%	290.9	5.15%
IT	24,276	0.72%	0.4%	224.3	3.97%
Tannery	22,399	0.66%	0.1%	87.6	1.55%
Paper & Printing	19,251	0.57%	-1.3%	184.4	3.27%
Ceramics	17,755	0.52%	1.4%	85.1	1.51%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BRACBANK	57.40	-0.35%	142.38	2.48	6.32
KBPPWBIL	121.60	6.39%	136.69	1.13	608.00
BEACHHATCH	49.60	-1.20%	107.41	2.14	8.12
BATBC	282.00	-1.67%	91.25	0.32	11.97
ISLAMIBANK	44.40	4.96%	89.02	2.02	20.06

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
DAFODILCOM	60.20	9.85%	22.87	0.39	125.42
PADMALIFE	24.00	9.59%	12.31	0.52	-
YPL	15.00	9.49%	13.64	0.92	n/a
ARAMIT	208.20	9.29%	25.62	0.12	118.30
RAHIMTEXT	163.80	8.91%	25.67	0.16	153.56

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
JUTESPINN	211.30	-4.78%	0.50	0.00	n/a
REGENTTEX	4.00	-4.76%	0.59	0.15	n/a
ARAMITCEM	13.10	-4.38%	0.78	0.06	n/a
SAFKOSPINN	11.40	-4.20%	0.73	0.06	n/a
HAMI	101.10	-3.62%	8.88	0.09	361.07

BERGERPBL

Further clarification regarding Rights Share offer

Refer to their earlier news disseminated by DSE on 29.05.2025 regarding record date & subscription period for rights share issuance, the company has further informed that the subscription period for 1:1 share offering (after renunciation by sponsor/director shareholders) through Rights Issuance is 15 July to 3 August 2025 (both days inclusive). BRAC Bank PLC and Mutual Trust Bank PLC are the bankers to the issue. Application forms and other documents have been sent to the eligible shareholders through courier. The forms are also available at the company's website www.bergerbd.com/rights-share.

APSCLBOND

Change of TDS rate on coupon payment of APSCLBOND

The issuer of APSCLBOND has informed that record date for 10th coupon payment of APSCLBOND was July 7, 2025 and they will disburse the coupon through BEFTN on or before July 22, 2025 after deducting TDS at the rate of 10% instead of 5% as per Finance Ordinance, 2025 (Ordinance No.-28, Article No. 68) and ICB Capital Management Limited (trustee) letter dated July 10, 2025.

PRIMELIFE

Q2 Financials

As per consolidated life revenue account of the company for April to June, 2025, excess of total expenses including claims over total income (deficit) was BDT 206.22 million as against excess of total income over total expenses including claims (surplus) of BDT 38.58 million in the corresponding previous period of 2024. Whereas as per consolidated life revenue account of the company for January to June, 2025, excess of total expenses including claims over total income (deficit) was BDT 950.75 million as against excess of total expenses including claims over total income (deficit) of BDT 708.34 million in the corresponding previous period of 2024. Balance of Life Insurance Fund was BDT 6,541.15 million as on June 30, 2025 as against BDT 6,865.15 million as on June 30, 2024 resulting a net decrease of BDT 324 million.

PRIMELIFE

Q1 Financials

As per consolidated life revenue account of the company for January to March, 2025, excess of total expenses including claims over total income (deficit) was BDT 744.53 million as against excess of total expenses including claims over total income (deficit) of BDT 746.92 million in the corresponding previous period of 2024. Balance of Life Insurance Fund was BDT 6,747.37 million as on March 31, 2025 as against BDT 6,826.58 million as on March 31, 2024 resulting a net decrease of BDT 79.21 million.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ASIATICLAB	45	41.6	6	131250	5.7
BBS	11.5	11.5	1	43500	0.5
BEACONPHAR	124.5	124.5	1	11700	1.457
BEXIMCO	104.9	104.9	1	4803	0.504
EASTRNLUB	2750.2	2650	13	12649	34.096
EIL	49.5	49.5	1	11000	0.544
EXIM1STMF	5	4.9	3	1029000	5.135
FINEFOODS	245	230	7	108572	26.146
FUWANGFOOD	17.5	17.5	1	203000	3.553
GQBALLPEN	197.2	197.2	1	17700	3.49
HAKKANIPUL	70	61.3	3	24600	1.65
HAMI	110	110	1	20000	2.2
INTRACO	22	22	1	45445	1
ISLAMIBANK	45.5	44	2	40000	1.79
JMISMDL	129.1	129.1	1	6000	0.775
KBPPWBIL	104	104	1	11538	1.2
KDSALTD	45	45	1	59930	2.697
LOVELLO	92.5	88.1	4	54050	4.821
MIDLANDBNK	25.5	25.5	3	200298	5.108
MLDYEING	9.2	9.2	2	2101272	19.332
MONNOCERA	97	97	1	37000	3.589
RAHIMAFOD	110.2	110.2	1	4546	0.501
RELIANCE1	17.4	17.4	3	235000	4.089
RENATA	489	489	1	50000	24.45
SALVOCHEM	25.8	21.2	2	65011	1.539
SIBL	8.6	8.6	1	60000	0.516
UTTARABANK	19.6	19.6	1	100000	1.96

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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

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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		