Daily Market Review

Market closed flat

29-Jun-2026

DSEX WENT UP BY 2.8 POINTS

Market closed flat today with decrease in turnover.

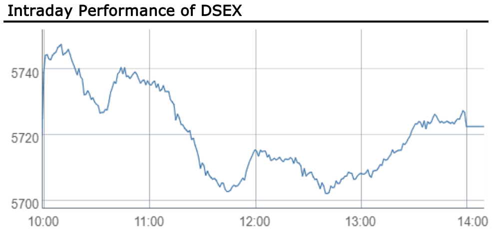
Broad index DSEX went up by 2.8 points.

Jute, IT and G. Insurance are the top three sectors that closed positive today while Ceramics, Services & Real Estate and Tannery are the top three sectors that closed negative today.

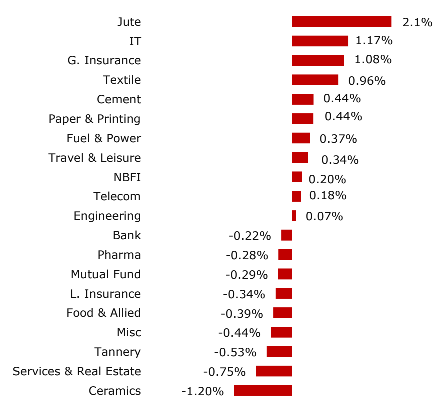
Turnover decreased by 1.4% to BDT 13,515mn (USD 110mn).

Bank sector dominated the turnover chart covering 15.6% of the total turnover.

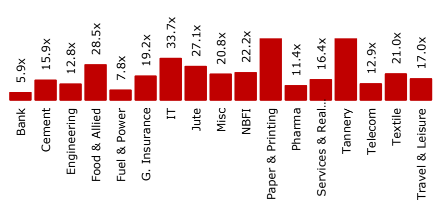
Intraday Performance of DSEX



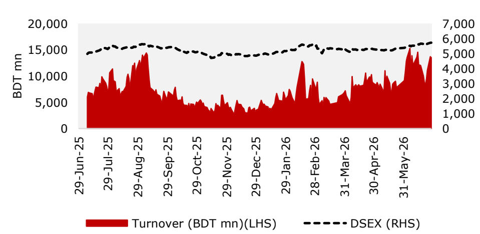
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'25 Value	YTD Δ %
DSEX	5,722.54	2.8	0.05%	4,865.34	17.62%
DS30	2,166.46	3.9	0.18%	1,853.54	16.88%
DSES	1,156.73	(0.2)	-0.02%	1,000.72	15.59%
S&P 500	7,354.02	(3.5)	-0.05%	6,845.50	7.43%
Nikkei 225	69,468.11	107.2	0.15%	50,339.48	38.00%
FTSE 100	10,483.39	(24.6)	-0.23%	9,931.38	5.56%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	13,515	13,710	-195	-1.42%	9,509
Turnover (USD mn)	110	112	-2	-1.42%	78
Volume (mn)	404	447	-43	-9.60%	320
Market Cap (BDT bn)	6,977	6,968	9	0.13%	
Market Cap (USD bn)	57	57	0	0.13%	
Market P/E (x)	10.7				

Particulars	Gainer	Loser	Unchanged
Market Breadth	178	158	63

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	742,920	20.83%	-0.2%	2,111.2	15.62%
Pharma	596,196	16.71%	-0.3%	1,435.6	10.62%
Telecom	552,081	15.48%	0.2%	269.7	2.00%
Fuel & Power	301,657	8.46%	0.4%	450.7	3.33%
Engineering	301,099	8.44%	0.1%	1,310.2	9.69%
Food & Allied	230,746	6.47%	-0.4%	587.8	4.35%
Misc	150,253	4.21%	-0.4%	1,414.8	10.47%
Textile	137,352	3.85%	1.0%	1,635.9	12.10%
G. Insurance	120,115	3.37%	1.1%	1,565.5	11.58%
NBFI	108,579	3.04%	0.2%	816.1	6.04%
Cement	99,353	2.79%	0.4%	165.2	1.22%
L. Insurance	50,227	1.41%	-0.3%	254.5	1.88%
Travel & Leisure	36,565	1.02%	0.3%	99.7	0.74%
IT	33,223	0.93%	1.2%	633.8	4.69%
Services & Real Estate	26,417	0.74%	-0.8%	348.3	2.58%
Mutual Fund	26,320	0.74%	-0.3%	158.0	1.17%
Tannery	24,592	0.69%	-0.5%	110.1	0.81%
Paper & Printing	22,554	0.63%	0.4%	165.0	1.22%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BEXIMCO	30.70	-1.60%	728.47	22.35	n/a
IPDC	32.50	6.56%	664.53	19.62	27.54
JAMUNABANK	24.20	0.41%	497.98	2.71	4.16
BRACBANK	66.30	-0.60%	426.93	6.43	6.80
MALEKSPIN	34.00	5.59%	313.32	8.90	6.00

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
RAHIMTEXT	225.30	8.74%	58.62	0.22	88.35
FASFIN	1.30	8.33%	0.68	0.52	n/a
JMISMDL	146.00	7.43%	24.38	0.17	n/a
IPDC	32.50	6.56%	664.53	19.62	27.54
CAPMIBBLMF	10.30	6.19%	19.32	1.92	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PLFSL	1.20	-7.69%	1.35	1.09	n/a
BDTHAI	20.70	-5.48%	306.00	13.88	n/a
SSSTEEL	6.70	-4.29%	9.95	1.46	335.00
FAMILYTEX	2.50	-3.85%	4.70	1.85	n/a
SAIFPOWER	10.80	-3.57%	24.17	2.23	15.43

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SQURPHARMA

Contract Manufacturing Agreement with M/s C2C Pharma Ltd.

The company has informed that the Board of Directors of the company in its meeting held on 28 June 2026 has approved agreements with M/s C2C Pharma Ltd., Dhaka, Bangladesh for contract manufacturing of some products on behalf of Square Pharmaceuticals PLC. to meet increased demand of existing products and to introduce new products. It is mentionable that DSE has requested the company to provide copy of the agreement; however, DSE is yet to receive the copy of the agreement.

MEGHNALIFE

Dividend Declaration

The Board of Directors has recommended 15% cash dividend for the year ended December 31, 2025. Date of AGM: 20.08.2026, Time: 11:00 AM, Venue/Mode: Digital Platform. Record Date: 23.07.2026. The Company has also reported NOCFPS of Tk. (4.19) for the year ended December 31, 2025 as against Tk. (13.71) for the year ended December 31, 2024.

FIRSTFIN

Dividend Declaration

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 17.09.2026, Time: 3:00 PM, Venue: Hybrid system meeting by using digital platform and physical presence. Physical meeting will be held at Trading Corporation of Bangladesh (TCB) Auditorium, 1 Karwanbazar (1st Floor), Dhaka-1215. Record Date: 22.07.2026. The Company has also reported EPS of Tk. (6.66), NAV per share of Tk. (46.01) and NOCFPS of Tk. (0.74) for the year ended December 31, 2025 as against Tk. (5.88), Tk. (37.86) and Tk. (0.69) respectively for the year ended December 31, 2024.

FIRSTFIN

Q1 Financials

EPS was Tk. (1.87) for January-March 2026 as against Tk. (1.27) for January-March 2025. NOCFPS was Tk. (0.06) for January-March 2026 as against Tk. (0.09) for January-March 2025. NAV per share was Tk. (47.88) as on March 31, 2026 and Tk. (39.13) as on March 31, 2025.

MEGHNALIFE

Q1 Financials

As per consolidated life revenue account of the company for January to March, 2026, excess of total expenses including claims over total income (deficit) was BDT 459.13 million as against excess of total expenses including claims over total income (deficit) of BDT 781.01 million in the corresponding previous period of 2025. Balance of Life Insurance Fund was BDT 15,275.99 million as on March 31, 2026 as against BDT 15,273.01 million as on March 31, 2025 resulting a net increase of BDT 2.98 million. NOCFPS was Tk. (12.78) as on March 31, 2026 and Tk. (10.39) as on March 31, 2025.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ABB1STMF	3.5	3.5	1	1128000	3.948
ACIFORMULA	156.9	156.9	1	3640	0.571
AGNISYSL	32.4	32.4	1	16000	0.518
ANWARGALV	129.8	129.8	2	11000	1.428
APEXSPINN	352	352	1	7034	2.476
ASIATICLAB	111	111	1	30000	3.33
BDTHAI	21.5	21.5	1	129500	2.784
BESTHLDNG	14.2	14.2	1	175057	2.486
BNICL	124	124	1	150000	18.6
BRACBANK	73.3	70	3	298510	21.227
BSC	121.8	121.8	1	4130	0.503
CENTRALINS	43.5	43.5	1	15000	0.652
CITYBANK	31.9	27.9	3	416500	13.2
CITYGENINS	106.6	96	5	1331289	137.386
CLICL	56.6	51.1	2	29000	1.564
CRYSTALINS	71	71	1	10000	0.71
DOMINAGE	80.1	74	10	1175204	90.361
DOREENPWR	28	28	1	131000	3.668
DUTCHBANGL	44.7	44.7	1	117600	5.257
EHL	90	90	1	11500	1.035
ENVOYTEX	54.5	54.5	1	1347200	73.422
FINEFOODS	512	480	8	172571	87.896
GENEXIL	35.6	35.6	1	15700	0.559
GQBALLPEN	660	580	10	79154	48.682
HAMI	176.8	176.8	3	12398	2.192
ICICL	29	29	2	239900	6.957
ISLAMIINS	62	62	1	62791	3.893
JAMUNABANK	23	23	1	500001	11.5
KAY&QUE	470	395	2	8402	3.656
KPCL	11.5	11.5	1	50000	0.575
LHB	60	60	1	195000	11.7
LOVELLO	70	70	1	27349	1.914
LRBDL	13.3	13.3	1	40000	0.532
MBL1STMF	3.9	3.9	1	523953	2.043
MEGHNALIFE	55	55	1	50000	2.75
MERCINS	39.1	39.1	1	150513	5.885
NAHEEACP	39	33	2	145000	5.055
NAVANAPHAR	63.2	63.2	1	15000	0.948
NCCBANK	17.7	16.5	5	930987	15.554
NFML	25.4	21	4	121700	2.851
ORIONINFU	324.5	324.5	1	50000	16.225
PEOPLESINS	61.6	61.6	1	193099	11.895
PRAGATIINS	84	84	1	22000	1.848
PRIMEINSUR	42.5	42.4	6	138000	5.853
PROVATIINS	54	54	1	11300	0.61
PTL	72.5	62.5	2	107800	6.815
QUEENSOUTH	13.6	13.6	1	80000	1.088
RELIANCINS	122.6	122.6	1	4200	0.515
REPUBLIC	33	33	1	20000	0.66
SAIHAMCOT	21.8	21.8	1	29650	0.646
SEMLIBBLSF	7.5	7.5	1	336349	2.523
SHAHJABANK	16	16	1	663000	10.608
SHASHADNIM	24.2	23.6	4	460773	10.962
SHYAMPSUG	227.5	210	9	34200	7.532
SIMTEX	28.5	28.5	1	49000	1.397
SIPLC	103	100	3	372900	37.602
SONARGAON	92	87	2	39993	3.649
TAKAFULINS	39.5	39.5	2	238265	9.411
TECHNODRUG	39	39	1	49965	1.949
TILIL	58.4	58.4	1	15550	0.908
VAMLRBBF	7.9	7.9	1	712609	5.63

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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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