Daily Market Review

Market closed positive

30-Jun-2026

DSEX WENT UP BY 40.3 POINTS

Market closed positive today with increase in turnover.

Broad index DSEX went up by 40.3 points.

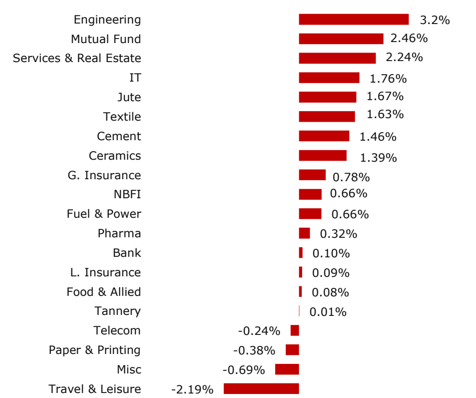
Engineering, Mutual Fund and Services & Real Estate are the top three sectors that closed positive today while Travel & Leisure, Misc and Paper & Printing are the top three sectors that closed negative today.

Turnover increased by 16.4% to BDT 15,737mn (USD 128mn).

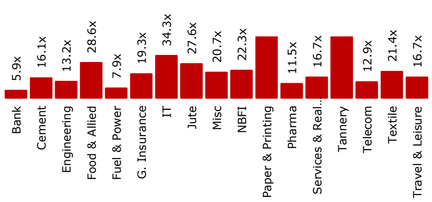
Textile sector dominated the turnover chart covering 15.5% of the total turnover.

Intraday Performance of DSEX

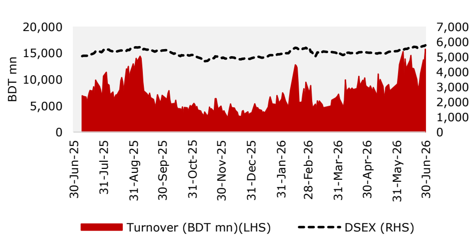
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'25 Value	YTD Δ %
DSEX	5,762.83	40.3	0.70%	4,865.34	18.45%
DS30	2,178.38	11.9	0.55%	1,853.54	17.53%
DSES	1,168.13	11.4	0.98%	1,000.72	16.73%
S&P 500	7,440.43	86.4	1.18%	6,845.50	8.69%
Nikkei 225	70,062.32	594.2	0.86%	50,339.48	39.18%
FTSE 100	10,608.16	123.9	1.18%	9,931.38	6.81%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	15,737	13,515	2,221	16.44%	9,657
Turnover (USD mn)	128	110	18	16.44%	79
Volume (mn)	475	404	70	17.43%	323
Market Cap (BDT bn)	6,987	6,977	10	0.14%	
Market Cap (USD bn)	57	57	0	0.14%	
Market P/E (x)	10.7				

Particulars	Gainer	Loser	Unchanged
Market Breadth	249	94	54

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	743,695	20.74%	0.1%	2,067.7	13.14%
Pharma	598,100	16.68%	0.3%	1,741.1	11.06%
Telecom	550,753	15.36%	-0.2%	296.1	1.88%
Engineering	310,721	8.67%	3.2%	1,486.9	9.45%
Fuel & Power	303,639	8.47%	0.7%	712.5	4.53%
Food & Allied	230,933	6.44%	0.1%	674.3	4.28%
Misc	149,214	4.16%	-0.7%	1,249.3	7.94%
Textile	139,593	3.89%	1.6%	2,433.4	15.46%
G. Insurance	121,051	3.38%	0.8%	1,604.3	10.19%
NBFI	109,294	3.05%	0.7%	712.8	4.53%
Cement	100,807	2.81%	1.5%	250.8	1.59%
L. Insurance	50,274	1.40%	0.1%	219.0	1.39%
Travel & Leisure	35,765	1.00%	-2.2%	121.4	0.77%
IT	33,809	0.94%	1.8%	771.2	4.90%
Services & Real Estate	27,007	0.75%	2.2%	589.7	3.75%
Mutual Fund	26,968	0.75%	2.5%	207.2	1.32%
Tannery	24,595	0.69%	0.0%	133.6	0.85%
Ceramics	22,483	0.63%	1.4%	246.9	1.57%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BRACBANK	65.50	-1.21%	769.85	11.41	6.72
BEXIMCO	29.30	-4.56%	607.92	20.72	n/a
MALEKSPIN	36.70	7.94%	574.95	16.26	6.47
SAPORTL	52.80	2.52%	448.97	8.52	24.79
IPDC	32.90	1.23%	393.59	11.92	27.88

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BSRMLTD	105.60	10.00%	121.86	1.18	4.84
ZEALBANGLA	148.80	9.98%	7.89	0.05	n/a
TAKAFULINS	44.20	9.95%	31.53	0.51	31.35
SILVAPHL	15.60	9.86%	104.51	6.83	n/a
USMANIAGL	46.00	9.79%	7.12	0.16	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BESTHLDNG	14.90	-5.10%	35.14	2.18	25.25
AOL	18.40	-4.66%	36.44	1.99	n/a
BEXIMCO	29.30	-4.56%	607.92	20.72	n/a
ICBIBANK	2.70	-3.57%	0.78	0.28	n/a
PROGRESLIF	42.40	-3.42%	0.68	0.02	n/a

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DELTALIFE

Q1 Financials

As per consolidated life revenue account of the company for the 1st Quarter ended on March 31, 2026: Balance of Life Insurance Fund was BDT 41,996.76 million as on March 31, 2026 as against BDT 39,560.76 million as on March 31, 2025. Net premium was BDT 2,269.05 million during January-March 2026 as against BDT 1,983.03 million during January-March 2025. Total expenses were BDT 2,201.47 million during January-March 2026 as against BDT 2,288.05 million during January-March 2025..

BESTHLDNG

Dividend Declaration

The Board of Directors has recommended No dividend for the year ended June 30, 2025. Date and Time of the AGM: Will be notified after the order by the Honorable Court, Venue: Will be notified through the AGM notice. Record Date: Will be notified after the order by the Honorable Court. The Company has also reported consolidated EPS (Basic) of Tk. 0.30, consolidated EPS (Diluted) of Tk. 0.28, consolidated NAV per share of Tk. 53.56 and consolidated NOCFPS of Tk. 1.39 for the year ended June 30, 2025 as against Tk. 1.43, Tk. 1.37, Tk. 57.82 and Tk. 1.82 respectively for the year ended June 30, 2024.

PHOENIXFIN

Dividend Declaration

The Board of Directors has recommended No dividend for the year ended December 31, 2025. Date of AGM: 27.08.2026, Time: 11:30 AM, Venue: Hybrid system physically at Muktijuddho Smrity Milonayaton (1st floor), Institution of Diploma Engineers, Bangladesh, 160/A, Kakrail, VIP Road, Dhaka and Digital Link: https://phoenixfinance.bdvirtualagm.com. Record Date: 23.07.2026. The Company has also reported EPS of Tk. (20.45), NAV per share of Tk. (102.46) and NOCFPS of Tk. 1.22 for the year ended December 31, 2025 as against Tk. (48.73), Tk. (82.01) and Tk. 0.28 respectively for the year ended December 31, 2024.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AAMRANET	19.5	19.5	1	26000	0.507
AGNISYSL	32.4	32.4	1	15500	0.502
ALARABANK	14.1	14.1	1	296383	4.179
ANWARGALV	128	128	1	4000	0.512
APEXSPINN	385	360	11	119982	43.552
ASIATICLAB	125.5	125.1	3	399000	49.927
BAYLEASING	4.3	4.3	1	430000	1.849
BDTHAIFOOD	27.9	27.9	1	20600	0.575
BERGERPBL	1421	1421	1	546	0.776
BEXIMCO	32.6	32.5	2	100140	3.26
BRACBANK	65.5	59.7	5	338499	21.372
CAPMIBBLMF	10.5	10.5	1	50000	0.525
CITYBANK	34.5	34.5	1	100000	3.45
CITYGENINS	106.2	96.5	6	946006	99.91
DAFODILCOM	152	151.9	4	57520	8.739
DHAKABANK	12.5	12.5	1	4000000	50
DOMINAGE	79.4	75.6	4	146542	11.37
EASTRNLUB	1942	1942	1	500	0.971
EBL	25	23.2	3	237789	5.87
EHL	98.2	98.2	1	10000	0.982
ENVOYTEX	55	52	2	1416000	77.667
FEKDIL	18.5	17.4	8	1500000	27.133
FINEFOODS	552.2	480	8	34678	17.821
GHAIL	17.2	17.2	1	47500	0.817
GOLDENSON	18.1	18.1	1	42000	0.76
GQBALLPEN	668.2	600	5	13238	8.123
HFL	15.5	15.5	3	99000	1.534
IBBLPBOND	645.5	645.5	1	1000	0.645
IBP	16.2	16.2	1	45000	0.729
ICBEPMF1S1	6.4	6.4	1	86500	0.554
INDEXAGRO	79.3	64.9	2	90525	6.666
IPDC	33	30.5	5	1115107	36.182
ISLAMIINS	60.2	56.1	2	53285	3.047
ITC	46.1	46	2	270000	12.434
JAMUNABANK	24.5	24	4	1006848	24.468
JAMUNAOIL	181.2	181.2	1	3000	0.544
KARNAPHULI	37.4	37.4	1	40000	1.496
KBPPWBIL	42.1	42.1	1	15000	0.631
LOVELLO	70	70	2	77142	5.4
MALEKSPIN	34.5	32.5	9	1800000	59.02
MEGHNAINS	37	37	1	70000	2.59
MEGHNALIFE	53.6	53.6	1	20000	1.072
MEGHNAPET	77.8	77.8	1	27799	2.163
MERCINS	41.2	41	3	631700	25.907
MTB	14.2	14.2	1	300000	4.26
NAHEEACP	35	35	2	65000	2.275
NAVANAPHAR	77	77	1	9450	0.728
NFML	22.6	22.6	1	90000	2.034
PARAMOUNT	62.5	62.5	1	20000	1.25
PF1STMF	8.8	8.4	3	2100000	17.78
POPULARLIF	61.5	61.5	1	12000	0.738
PREMIERCEM	50	50	1	200000	10
PRIMEBANK	30	30	2	250000	7.5
PRIMEINSUR	46	43.5	3	184243	8.071
PRIMELIFE	45	45	1	19000	0.855
PROVATIINS	60	59	2	30000	1.79
PTL	72.5	62.5	5	78142	5.058
PURABIGEN	34	32.5	2	46700	1.563
QUEENSOUTH	14.3	14.3	1	35000	0.5
RELIANCINS	123	120.5	2	15000	1.833
REPUBLIC	35	35	1	15000	0.525
SAIHAMCOT	18.9	18.9	1	50000	0.945
SAIHAMTEX	18.3	18.3	1	27700	0.507
SAPORTL	52.3	52	1	21,000.0	1.1
SHARPIND	24.3	24.3	1	50,000	1.2
SHYAMPSUG	232.1	230.0	15	92,179	21.3
SIPLC	103	103	1	10000	1.03
SONALILIFE	91.9	75.6	4	115700	9.542
SONARGAON	94	85.5	4	65864	6.04
TAKAFULINS	41	40	2	76819	3.124
TECHNODRUG	45	45	1	11200	0.504
UCB	8.1	8.1	1	614793	4.98

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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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Respective analyst(s) identified in this report certifies, with respect to the companies or securities that the individual analyses, that (1) the views expressed in this report reflect his or her personal views about all of the subject companies and securities and (2) no part of his or her compensation was, is or will be directly or indirectly dependent on the specific recommendations or views expressed in this report. The research analyst(s) named on this report are not registered / qualified as research analysts with FINRA.

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Mirpur-12
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Banasree
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