Daily Market Review

Market closed negative

22-Jul-2026

DSEX WENT DOWN BY 27.9 POINTS

Market closed negative today with increase in turnover.

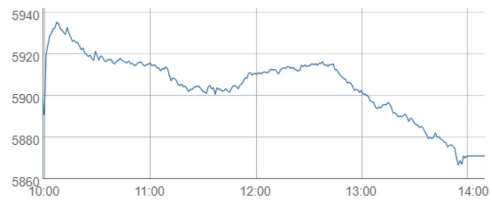
Broad index DSEX went down by 27.9 points.

Only Mutual Fund, Food & Allied and Telecom sectors closed positive today while G. Insurance, Travel & Leisure and L. Insurance are the top three sectors that closed negative today.

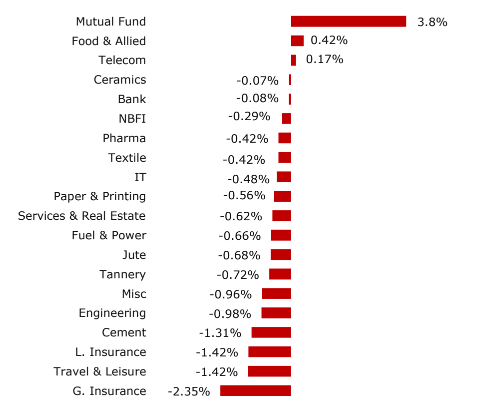
Turnover increased by 7.2% to BDT 12,111mn (USD 99mn).

Textile sector dominated the turnover chart covering 16.6% of the total turnover.

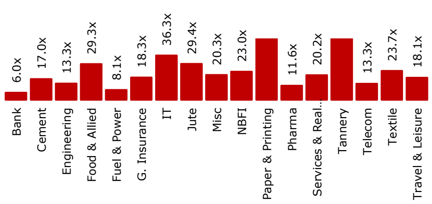
Intraday Performance of DSEX



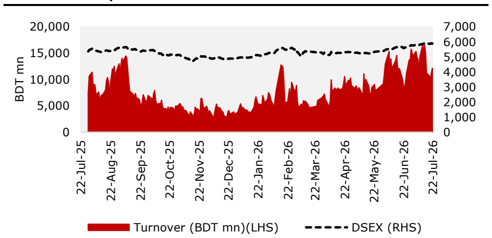
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'25 Value	YTD Δ %
DSEX	5,871.06	(27.9)	-0.47%	4,865.34	20.67%
DS30	2,216.65	(3.3)	-0.15%	1,853.54	19.59%
DSES	1,199.18	(4.8)	-0.40%	1,000.72	19.83%
S&P 500	7,509.20	65.9	0.89%	6,845.50	9.70%
Nikkei 225	66,115.60	(116.6)	-0.18%	50,339.48	31.34%
FTSE 100	10,683.96	98.1	0.93%	9,931.38	7.58%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	12,111	11,294	817	7.24%	11,076
Turnover (USD mn)	99	92	7	7.24%	91
Volume (mn)	517	457	60	13.18%	359
Market Cap (BDT bn)	7,056	7,075	-19	-0.27%	
Market Cap (USD bn)	57	58	0	-0.27%	
Market P/E (x)	9.4				

Particulars	Gainer	Loser	Unchanged
Market Breadth	100	245	44

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	755,526	20.72%	-0.1%	946.6	7.82%
Pharma	604,881	16.59%	-0.4%	1,695.0	14.00%
Telecom	551,683	15.13%	0.2%	159.2	1.31%
Engineering	314,049	8.61%	-1.0%	937.2	7.74%
Fuel & Power	312,205	8.56%	-0.7%	404.8	3.34%
Food & Allied	236,678	6.49%	0.4%	530.8	4.38%
Textile	149,294	4.09%	-0.4%	2,004.7	16.55%
Misc	146,486	4.02%	-1.0%	509.0	4.20%
NBFI	116,896	3.21%	-0.3%	736.2	6.08%
G. Insurance	115,875	3.18%	-2.3%	769.4	6.35%
Cement	106,325	2.92%	-1.3%	158.5	1.31%
L. Insurance	54,089	1.48%	-1.4%	328.4	2.71%
Travel & Leisure	38,922	1.07%	-1.4%	98.8	0.82%
IT	35,759	0.98%	-0.5%	943.3	7.79%
Mutual Fund	33,437	0.92%	3.8%	962.8	7.95%
Services & Real Estate	27,210	0.75%	-0.6%	239.0	1.97%
Tannery	25,972	0.71%	-0.7%	139.5	1.15%
Ceramics	23,560	0.65%	-0.1%	293.3	2.42%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ITC	53.10	3.11%	532.61	10.07	15.99
CITYBANK	31.90	0.63%	235.90	7.58	3.32
TECHNODRUG	48.40	-0.21%	226.99	4.64	31.63
FEKDIL	26.00	0.00%	199.74	7.68	n/a
FUWANGCER	16.70	3.73%	197.55	11.58	n/a

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MBL1STMF	6.60	10.00%	11.84	1.79	n/a
PRIMEFIN	3.50	9.38%	8.74	2.51	n/a
BIFC	4.80	9.09%	6.10	1.38	n/a
EXIM1STMF	5.00	8.70%	23.10	4.63	n/a
FBFIF	3.90	8.33%	45.10	11.65	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PREMIERBAN	5.20	-8.77%	17.60	3.28	n/a
USMANIAGL	67.50	-7.53%	10.86	0.15	n/a
SONARBAINS	38.20	-7.06%	35.13	0.90	74.90
ZEALBANGLA	219.90	-6.98%	10.79	0.05	n/a
UNIONINS	49.40	-6.44%	55.15	1.09	25.86

UNIONCAP

Q2 Financials

Consolidated EPS was Tk. (1.18) for April-June 2026 as against Tk. (1.53) for April-June 2025; Consolidated EPS was Tk. (2.12) for January-June 2026 as against Tk. (1.60) for January-June 2025. Consolidated NOCFPS was Tk. (0.18) for January-June 2026 as against Tk. 0.89 for January-June 2025. Consolidated NAV per share was Tk. (67.61) as on June 30, 2026 and Tk. (65.49) as on December 31, 2025. Reasons for deviation: Consolidated EPS for the half year ended on 30 June 2026 has been decreased from the same period of previous year due to: i) decreased interest income and reduced provision release resulting from lower recovery against non-performing loans; and ii) decreased recovery from written off loans.

SOUTHEASTB

Q2 Financials

Consolidated EPS was Tk. 0.65 for April-June 2026 as against Tk. 0.59 for April-June 2025; Consolidated EPS was Tk. 1.64 for January-June 2026 as against Tk. 1.00 for January-June 2025. Consolidated NOCFPS was Tk. 39.39 for January-June 2026 as against Tk. 2.39 for January-June 2025. Consolidated NAV per share was Tk. 27.16 as on June 30, 2026 and Tk. 24.33 as on as on June 30, 2025. Reasons for deviation: EPS increased due to increase of investment income and decreased provision against loans and advances as compared to previous period. NOCFPS increased due to increase in borrowings/deposit from other banks & customers as compared to previous period.

CRYSTALINS

Q2 Financials

EPS was Tk. 0.81 for April-June 2026 as against Tk. 0.84 for April-June 2025; EPS was Tk. 1.94 for January-June 2026 as against Tk. 1.78 for January-June 2025. NOCFPS was Tk. 1.77 for January-June 2026 as against Tk. 0.90 for January-June 2025. NAV per share was Tk. 28.47 as on June 30, 2026 and Tk. 27.65 as on December 31, 2025. Reasons for deviation: NOCFPS increased compared to the previous period due to omission agent commission expense and decrease certain operating expense items.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AAMRATECH	16.3	16.3	1	117691	1.918
ACIFORMULA	183	182	2	10300	1.879
AGNISYSL	34.8	34.8	1	15862	0.552
ALIF	6	6	1	120000	0.72
ASIATICLAB	135	135	6	400000	54
BDTHAI	19.4	19.4	1	31520	0.611
BNICL	114	113	2	9190	1.043
CAPMIBBLMF	14.7	14.7	1	150000	2.205
CITYBANK	28.8	28.8	1	2000000	57.6
CITYGENINS	100	100	1	14500	1.45
CONFIDCEM	77.6	77.6	1	8450	0.656
DAFODILCOM	167	167	1	20000	3.34
DOMINAGE	81	68.2	7	284547	21.551
EHL	101	97	2	25800	2.563
FEKDIL	28.6	28.6	1	50000	1.43
ICICL	31.7	31.7	1	30000	0.951
IFIC	5	5	1	250000	1.25
IPDC	33.5	33.5	1	19998	0.67
ISLAMIINS	64	64	1	10000	0.64
ITC	51.3	47	4	182000	8.94
LOVELLO	78	78	1	16999	1.326
MARICO	2720	2720	6	21000	57.12
MEGHNAPET	93	93	2	15901	1.479
NAVANAPHAR	79.7	79.7	1	150000	11.955
ORIONINFU	317	317	1	24500	7.766
PEOPLESINS	54.7	54.7	1	20000	1.094
RELIANCINS	115	115	1	4350	0.5
SAIHAMCOT	20.6	20.6	1	96000	1.978
SALVO	40.5	40.5	1	14000	0.567
SHARPIND	33.2	32.4	3	84836	2.774
SILCOPHL	21.7	21.7	1	23500	0.51
SIPLC	101	101	1	40000	4.04
SONALILIFE	77.6	77.6	2	24480	1.9
SONARGAON	91	90	8	1082999	97.59
SPCERAMICS	26	26	1	20000	0.52
SUNLIFEINS	72	72	2	552107	39.752
UNIONINS	55.8	55.8	1	25000	1.395

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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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