Daily Market Review

Market closed negative

23-Jul-2026

DSEX WENT DOWN BY 66.8 POINTS

Market closed negative today with decrease in turnover.

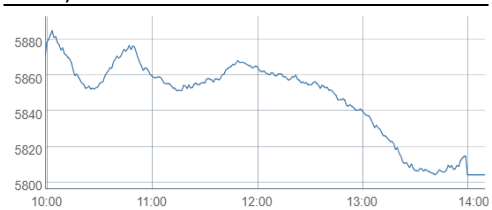
Broad index DSEX went down by 66.8 points.

No sector closed positive today while Travel & Leisure, Mutual Fund and Ceramics are the top three sectors that closed negative today.

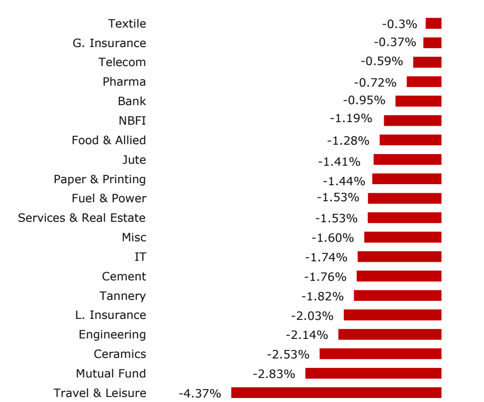
Turnover decreased by 22.5% to BDT 9,389mn (USD 76mn).

Textile sector dominated the turnover chart covering 20.5% of the total turnover.

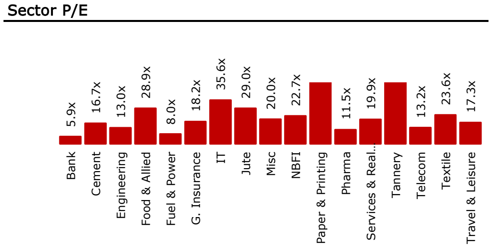
Intraday Performance of DSEX



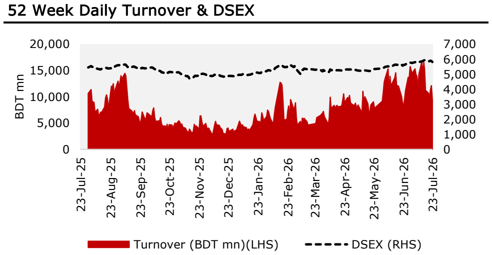
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'25 Value	YTD Δ %
DSEX	5,804.30	(66.8)	-1.14%	4,865.34	19.30%
DS30	2,192.72	(23.9)	-1.08%	1,853.54	18.30%
DSES	1,183.06	(16.1)	-1.34%	1,000.72	18.22%
S&P 500	7,498.96	(10.2)	-0.14%	6,845.50	9.55%
Nikkei 225	66,422.60	307.0	0.46%	50,339.48	31.95%
FTSE 100	10,709.81	(7.2)	-0.07%	9,931.38	7.84%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	9,389	12,111	-2,722	-22.48%	11,085
Turnover (USD mn)	76	99	-22	-22.48%	91
Volume (mn)	412	517	-105	-20.30%	361
Market Cap (BDT bn)	7,013	7,056	-43	-0.61%	
Market Cap (USD bn)	57	57	0	-0.61%	
Market P/E (x)	9.3				

Particulars	Gainer	Loser	Unchanged
Market Breadth	59	310	20

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	748,323	20.76%	-1.0%	1,064.1	11.33%
Pharma	600,516	16.66%	-0.7%	1,086.6	11.57%
Telecom	548,451	15.21%	-0.6%	155.8	1.66%
Fuel & Power	307,437	8.53%	-1.5%	334.2	3.56%
Engineering	307,327	8.52%	-2.1%	634.0	6.75%
Food & Allied	233,642	6.48%	-1.3%	444.7	4.74%
Textile	148,809	4.13%	-0.3%	1,926.1	20.51%
Misc	144,137	4.00%	-1.6%	456.2	4.86%
NBFI	115,499	3.20%	-1.2%	555.2	5.91%
G. Insurance	115,440	3.20%	-0.4%	585.2	6.23%
Cement	104,453	2.90%	-1.8%	137.1	1.46%
L. Insurance	52,991	1.47%	-2.0%	152.2	1.62%
Travel & Leisure	37,222	1.03%	-4.4%	114.2	1.22%
IT	35,137	0.97%	-1.7%	454.2	4.84%
Mutual Fund	32,492	0.90%	-2.8%	599.1	6.38%
Services & Real Estate	26,794	0.74%	-1.5%	230.6	2.46%
Tannery	25,500	0.71%	-1.8%	120.4	1.28%
Paper & Printing	22,973	0.64%	-1.4%	166.4	1.77%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SHARPIND	35.30	0.86%	369.54	10.31	n/a
CITYBANK	31.80	-0.31%	232.45	7.28	3.31
MLDYEING	16.40	5.81%	167.53	10.36	n/a
BRACBANK	63.40	-0.78%	161.65	2.55	6.50
SAPORTL	52.30	-1.51%	160.88	3.05	24.55

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FAMILYTEX	2.50	8.70%	6.79	2.77	n/a
TUNGHAI	2.80	7.69%	1.88	0.68	n/a
NURANI	2.90	7.41%	1.05	0.37	n/a
GENNEXT	3.00	7.14%	18.44	6.30	n/a
CNATEX	3.10	6.90%	9.01	2.95	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SHYAMPSUG	302.60	-8.72%	20.11	0.06	n/a
USMANIAGL	62.60	-7.26%	9.23	0.14	n/a
RENWICKJA	919.80	-7.04%	1.93	0.00	117.17
BESTHLDNG	15.20	-5.59%	16.41	1.06	25.76
CAPMIBBLMF	14.40	-5.26%	24.10	1.66	n/a

PUBALIBANK

Board decision to purchase land

The company has informed that the Board of Directors in its meeting held on 22 July 2026 has decided to purchase a land measuring 95.10 decimal/57.64 Katha along with a 26 (Twenty-Six) storied under-construction building, including 03 (three) basement floors, namely "Swiss Tower", situated at 208, Bir Uttam Mir Showkat Sarak (Tejgaon Link Road), Dhaka for establishing the Corporate Head Office of the Bank at a total cost of BDT 800 Crore (Taka Eight Hundred Crore) only including Income Taxes and excluding VAT, subject to approval of Bangladesh Bank & all other relevant regulatory authorities.

RUPALIBANK

Q2 Financials

Diluted Consolidated EPS (considering share money deposit) was Tk. (2.09) for April-June 2026 as against Tk. 0.03 for April-June 2025; Diluted Consolidated EPS (considering share money deposit) was Tk. (5.48) for January-June 2026 as against Tk. 0.09 for January-June 2025. Diluted Consolidated NOCFPS (considering share money deposit) was Tk. 2.53 for January-June 2026 as against Tk. 58.12 for January-June 2025. Diluted Consolidated NAV per share (considering share money deposit) was Tk. 9.37 as on June 30, 2026 and Tk. 14.63 as on as on December 31, 2025. Reasons for deviation in EPS and NOCFPS: EPS decreased due to decrease in total operating income compared to the same period of previous year. NOCFPS decreased due to increase of Loans and Advances compared to the same period of previous year.

JAMUNABANK

Q2 Financials

Consolidated EPS was Tk. 2.09 for April-June 2026 as against Tk. 1.40 (restated) for April-June 2025; Consolidated EPS was Tk. 4.03 for January-June 2026 as against Tk. 3.31 (restated) for January-June 2025. Consolidated NOCFPS was Tk. 52.38 for January-June 2026 as against Tk. 47.31 (restated) for January-June 2025. Consolidated NAV per share was Tk. 30.54 as on June 30, 2026 and Tk. 27.43 as on December 31, 2025. Reasons for deviation: The increase in EPS was mainly attributable to higher net profit after tax, driven by increased investment income, reduced provisioning, and improved operating performance during the period. NOCFPS increased compared to the same period of last year due to higher Operating income especially higher income received from investments, significant growth in deposits from customers etc. NAVPS increased primarily due to the growth in shareholders' equity resulting from higher retained earnings generated by increased net profit after tax during the period.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ACIFORMULA	183	183	1	8000	1.464
AGNISYSL	34.6	34.6	1	14700	0.509
AMANFEED	37.2	37.2	1	13900	0.517
ASIATICLAB	130	130	1	100000	13
BAYLEASING	5	5	2	413770	2.069
BDTHAI	18.2	16.9	2	84300	1.464
BNICL	110	110	1	4600	0.506
BRACBANK	63.9	63.1	7	851100	53.749
BSC	124	111	2	17639	2.103
BSRMLTD	108	108	1	20500	2.214
CAPITECGBF	8.7	8.7	1	90000	0.783
CAPMIBBLMF	14.5	14.5	1	50000	0.725
CITYGENINS	101	98	2	74779	7.345
DAFODILCOM	165.9	165.9	1	10000	1.659
DULAMIACOT	210.3	208	7	51172	10.7
FEKDIL	25.9	25.9	3	527000	13.649
ISLAMIINS	62	62	1	111290	6.9
KARNAPHULI	42.5	42.5	1	36700	1.56
LANKABAFIN	18.9	18.9	1	55000	1.04
MEGHNAPET	92.4	91	3	44606	4.101
MERCANBANK	7.1	7.1	1	300000	2.13
MIRAKHTER	42.3	42.3	1	30000	1.269
MLDYEING	17	17	1	180000	3.06
NAVANAPHAR	78.7	78.7	2	100000	7.87
NCCBANK	17.3	17.3	1	30000	0.519
PARAMOUNT	63.7	53	2	332500	17.778
PRIMEBANK	31	28	4	587195	17.916
RELIANCINS	117.5	117.5	1	150000	17.625
SHARPIND	37	32	7	681702	23.331
SHASHADNIM	27.5	27.5	1	49999	1.375
SIPLC	102.5	102.5	1	5000	0.512
SONALILIFE	92.8	92.8	1	5500	0.51
SONARGAON	87.2	87.2	1	8000	0.698

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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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