

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.27%) lost 13.97 points and closed at 5,205.19. The blue-chip index DS30 (+0.77%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (+0.21%) closed at 1,929.34, 1,167.83, and 1,051.74 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 1.73% followed by Food & Allied (-1.05%), Engineering (-0.86%), Bank (-0.51%), Telecommunication (-0.27%), Fuel & Power (+0.06%), and Pharmaceutical (+1.26%), respectively. Block trades contributed 2.6% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+9.8%) was the most traded share with a turnover of BDT 307 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,205.19	5,219.16	-13.97	-0.27%	-0.2%
DS30	1,929.34	1,914.69	+14.65	+0.77%	-0.5%
DSES	1,167.83	1,168.11	-0.28	-0.02%	-0.1%
CDSET	1,051.74	1,049.51	+2.23	+0.21%	-1.3%

	Advanced	Declined	Unchanged	Total
All Category	101	262	30	393
A Category (Equity)	74	128	14	216
B Category (Equity)	11	65	6	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	16	69	10	95
Mutual Funds	33	2	1	36
Corporate Bonds	1	0	0	1
Treasury Bonds	1	0	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,766,548	6,738,662	+0.4%
	Mn USD	55,464	55,235	
Turnover	Mn BDT	4,155	3,151	+31.9%
	Mn USD	34	26	
Volume	Mn Shares	194	129	+50.2%
	No. of Trade	140,441	98,226	+43.0%

\* Average Interbank Exchange Rate is BDT 122.00 as of Apr 06, 2025

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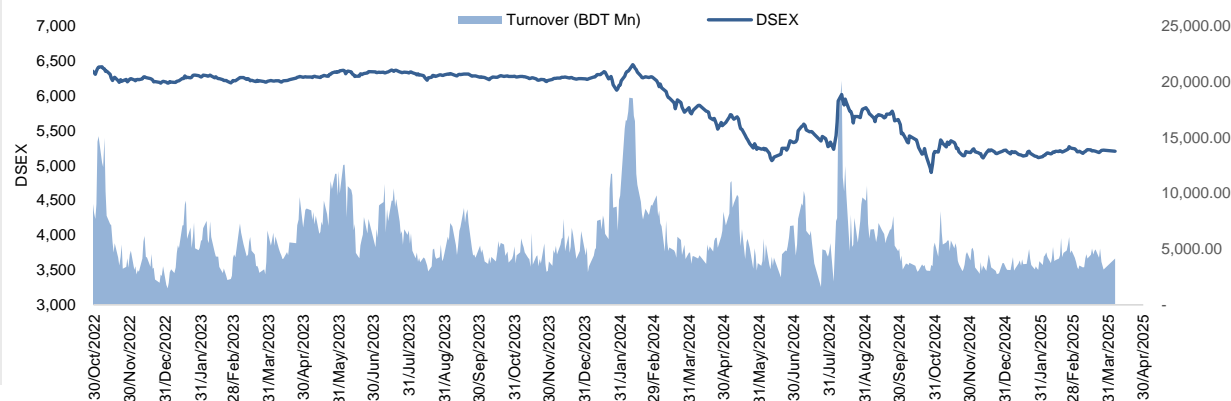


Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

1,200.0

900.0

600.0

300.0

0.0

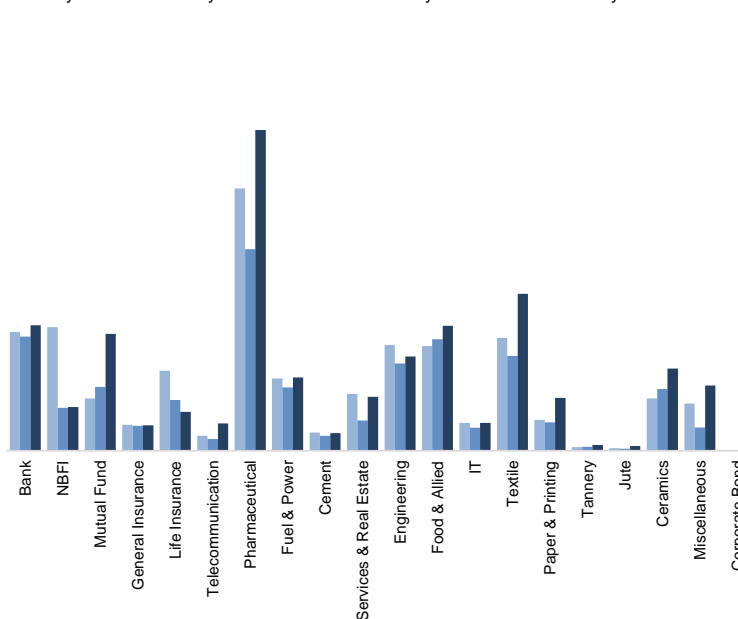
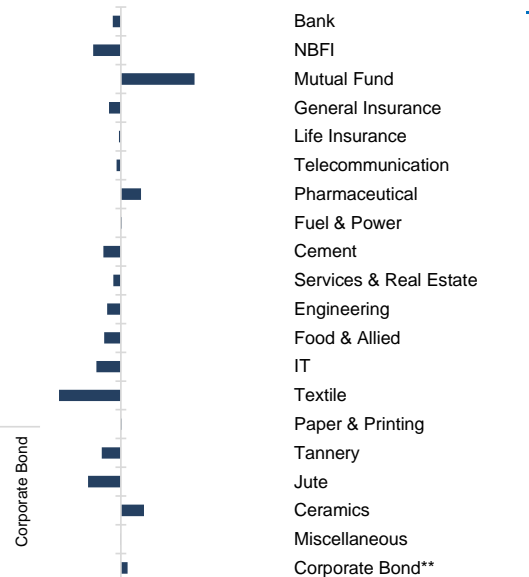


Figure: Sectorial Mcap Change

-5% 0% 5% 10%



Market PE 14.6x

Market PB 1.2x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,421	1,428	-7.25	-0.51%	36	672,197	9.9%	348.5	8.6%	8.5x	0.7x	GP	433,176	12.3%	18.9	11.9x	6.7x
NBFI	1,073	1,092	-18.90	-1.73%	23	102,273	1.5%	121.3	3.0%	NM	NM	SQURPHARMA	195,019	5.5%	113.7	8.7x	1.5x
Mutual Fund	654	626	+28.85	+4.61%	37	30,079	0.4%	324.1	8.0%	NM	0.6x	BATBC	173,178	4.9%	14.8	9.9x	3.0x
General Insurance	2,569	2,589	-19.33	-0.75%	43	73,344	1.1%	70.2	1.7%	13.1x	1.1x	WALTONHIL	139,408	4.0%	3.1	10.6x	1.3x
Life Insurance	1,790	1,793	-2.05	-0.11%	15	47,620	0.7%	108.0	2.7%	NM	NM	ROBI	136,710	3.9%	51.9	19.5x	2.0x
Telecommunication	5,056	5,070	-13.62	-0.27%	3	592,855	8.8%	75.7	1.9%	13.3x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,982	2,945	+37.20	+1.26%	34	565,293	8.4%	890.1	22.0%	13.7x	1.6x	BRACBANK	89,547	2.5%	19.7	8.1x	1.2x
Fuel & Power	1,086	1,086	+0.67	+0.06%	23	287,760	4.3%	203.3	5.0%	16.1x	0.6x	BERGERPBL	83,081	2.4%	0.7	24.2x	5.7x
Cement	1,762	1,781	-19.50	-1.09%	7	83,959	1.2%	49.1	1.2%	16.6x	1.9x	MARICO	75,786	2.1%	5.5	13.5x	10.0x
Services & Real Estate	1,016	1,020	-4.91	-0.48%	9	55,853	0.8%	149.9	3.7%	19.9x	0.4x	ISLAMIBANK	69,874	2.0%	10.4	15.0x	1.0x
Engineering	2,454	2,475	-21.31	-0.86%	42	276,829	4.1%	261.7	6.5%	12.6x	0.9x	RENATA	57,543	1.6%	9.7	19.5x	1.7x
Food & Allied	15,609	15,774	-165.27	-1.05%	21	285,606	4.2%	346.7	8.6%	15.6x	4.2x	LHB	52,842	1.5%	20.1	13.8x	2.8x
IT	1,936	1,966	-30.17	-1.53%	11	25,536	0.4%	77.6	1.9%	19.8x	1.6x	BXPHARMA	48,537	1.4%	307.4	7.6x	1.0x
Textile	1,091	1,135	-44.04	-3.88%	58	113,655	1.7%	435.5	10.8%	90.6x	0.8x	UNILEVERCL	48,336	1.4%	0.0	72.4x	19.8x
Paper & Printing	4,645	4,642	+2.37	+0.05%	6	20,983	0.3%	147.1	3.6%	NM	1.0x	ICB	44,230	1.3%	11.6	34.9x	1.0x
Tannery	1,935	1,958	-23.40	-1.20%	6	21,560	0.3%	15.8	0.4%	NM	1.6x	DUTCHBANGL	43,677	1.2%	2.4	7.0x	0.9x
Jute	11,803	12,050	-247.17	-2.05%	3	2,598	0.0%	12.8	0.3%	NM	NM	EBL	36,806	1.0%	42.8	5.6x	0.9x
Ceramics	434	428	+6.19	+1.45%	5	19,475	0.3%	228.0	5.6%	NM	1.2x	PUBALIBANK	33,201	0.9%	4.0	3.5x	0.6x
Miscellaneous	4,248	4,249	-1.27	-0.03%	15	230,679	3.4%	181.3	4.5%	94.9x	1.9x	POWERGRID	32,806	0.9%	0.8	NM	0.3x
Corporate Bond**	15,212	15,147	+64.60	+0.43%	16	33,317	0.5%	1.5	0.0%	NM	NM	CITYBANK	31,101	0.9%	35.3	4.3x	0.8x
Treasury Bond**	1,778	1,715	+62.38	+3.64%	235	3,224,592	47.7%	0.2	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BXPHARMA	108.8	+9.8%	307.4	7.6x	1.0x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	BXPHARMA	108.8	+9.8%	307.4	7.6x	1.0x
NCCBLMF1	5.7	+9.6%	2.3	NM	0.6x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	SPCERAMICS	28.7	+9.5%	182.8	NM	1.0x
SPCERAMICS	28.7	+9.5%	182.8	NM	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	99.8	-9.3%	156.0	29.3x	6.6x
ICBAMCL2ND	6.9	+9.5%	1.9	NM	1.1x	BATBC	50,233	3.6%	9.9x	3.0x	BSC	90.1	+4.6%	141.9	4.7x	0.9x
MBL1STMF	4.7	+9.3%	2.3	NM	0.5x	WALTONHIL	46,773	3.3%	10.6x	1.3x	SQURPHARMA	220.0	-0.0%	113.7	8.7x	1.5x
NAVANAPHAR	57.0	+9.20%	88.3	14.5x	1.3x	BRACBANK	46,489	3.3%	8.1x	1.2x	NAVANAPHAR	57.0	+9.2%	88.3	14.5x	1.3x
PHPMF1	3.6	+9.1%	14.7	NM	0x	GP	44,708	3.2%	11.9x	6.7x	EHL	80.3	+4.2%	75.6	11.6x	0.9x
POPULAR1MF	3.7	+8.8%	18.8	NM	0.4x	RENATA	32,968	2.3%	19.5x	1.7x	AIL	50.5	-6.8%	74.8	19.0x	2.2x
IFIC1STMF	3.7	+8.8%	23.3	NM	0.4x	BXPHARMA	23,409	1.7%	7.6x	1.0x	UTTARABANK	25.7	-	69.0	8.3x	0.8x
PROGRESLIF	74.0	+8.7%	10.7	NM	NM	PUBALIBANK	22,905	1.6%	3.5x	0.6x	ABB1STMF	4.7	+4.4%	67.0	NM	0.5x
						CITYBANK	21,020	1.5%	4.3x	0.8x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	13.8x	2.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	99.8	-9.3%	156.0	29.3x	6.6x	OLYMPIC	20,496	1.5%	15.7x	2.5x	BEACHHATCH	118.5	99.5	7.0	442	44.86
HAKKANIPUL	60.7	-8.2%	48.4	NM	2x	ALARABANK	18,282	1.3%	15.4x	1.1x	MERCANBANK	10.2	10.2	2.0	2,510	25.60
HFL	10.0	-7.4%	1.2	NM	0.3x	BEACONPHAR	17,838	1.3%	50.3x	4.4x	AL-HAJTEX	154.0	150.3	3.0	40	6.07
SIMTEX	17.7	-7.3%	15.7	17.0x	0.8x	PRIMEBANK	16,142	1.1%	3.7x	0.7x	LOVELLO	83.9	83.9	1.0	60	5.03
NEWLINE	9.0	-7.2%	10.6	NM	0.4x	ROBI	14,876	1.1%	19.5x	2.0x	ABB1STMF	4.7	4.3	2.0	900	3.95
METROSPIN	13.0	-7.1%	1.0	NM	2.5x	UTTARABANK	13,699	1.0%	8.3x	0.8x	PREMIERCEM	53.0	53.0	3.0	74	3.92
DSSL	10.6	-7.0%	20.0	35.3x	0.6x	NBL	13,055	0.9%	NM	2.2x	RELIANCE1	20.7	20.0	4.0	175	3.52
AIL	50.5	-6.8%	74.8	19.0x	2.2x	BSRMLTD	12,852	0.9%	5.1x	0.5x	AOL	16.0	16.0	2.0	169	2.70
VFSTDL	8.2	-6.8%	2.2	43.2x	0.4x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
PRIMETEX	14.0	-6.7%	0.7	NM	0.2x	** The base of the Bond Index starts at 100, starting from Jan 13, 2022										
						Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022										

\* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

\*\* The base of the Bond Index starts at 100, starting from Jan 13, 2022

Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACHHATCH	118.5	99.5	44.9	442	7
MERCANBANK	10.2	10.2	25.6	2,510	2
AL-HAJTEX	154.0	150.3	6.1	40	3
LOVELLO	83.9	83.9	5.0	60	1
ABB1STMF	4.7	4.3	4.0	900	2
PREMIERCEM	53.0	53.0	3.9	74	3
RELIANCE1	20.7	20.0	3.5	175	4
AOL	16.0	16.0	2.7	169	2
SIMTEX	18.9	18.9	2.1	110	1
EASTRNLUB	1,938.5	1,938.5	1.9	1	1
PTL	48.8	48.8	1.3	27	1
SUNLIFEINS	76.5	64.1	1.2	17	2
SHEPHERD	18.5	18.5	0.9	49	1
IPDC	17.3	17.3	0.9	50	1
NRBBANK	13.0	13.0	0.9	66	1
NAVANAPHAR	47.1	47.1	0.7	14	1
EIL	57.0	57.0	0.6	10	1
DSSL	12.5	12.5	0.6	45	1

<b>Total</b>			<b>106.6</b>	<b>35</b>
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**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PIONEERINS		0.0%	25.0%	Record Date	7-Apr-25
LHB		0.0%	19.0%	Record Date	9-Apr-25
UTTARABANK		17.5%	17.5%	Record Date	20-Apr-25
PARAMOUNT		0.0%	10.0%	Record Date	22-Apr-25
EBL		17.5%	17.5%	Record Date	23-Apr-25

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**Important DSE News**
**ARAMITCEM**

**(Q2 Un-audited):** EPS was Tk. (1.78) for October-December 2024 as against Tk. (3.86) for October-December 2023; EPS was Tk. (4.01) for July-December 2024 as against Tk. (7.88) for July-December 2023. NOCFPS was Tk. 1.75 for July-December 2024 as against Tk. (1.22) for July-December 2023. NAV per share was Tk. (22.87) as on December 31, 2024 and Tk. (18.90) as on June 30, 2024.