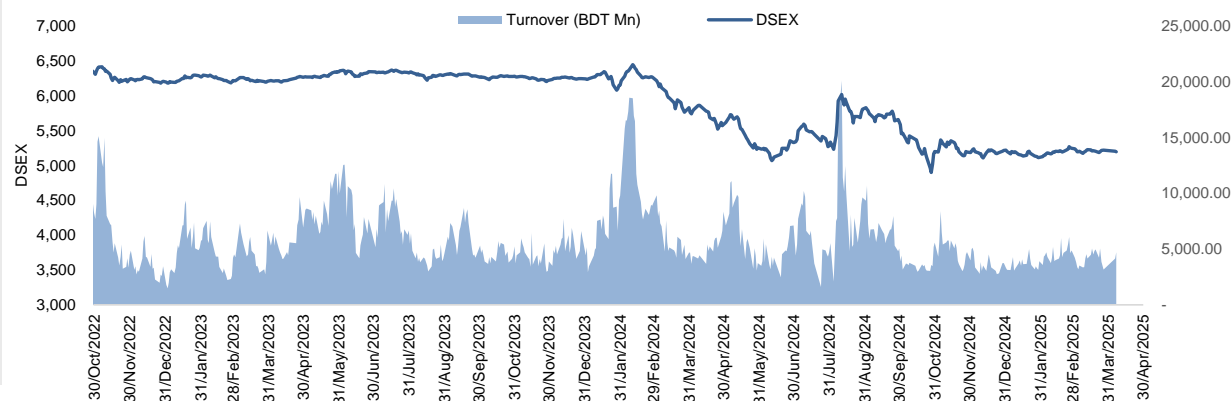


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.16%) lost 8.49 points and closed at 5,196.70. The blue-chip index DS30 (+0.07%), the Shariah-based index DSES (-0.16%), and the large-cap index CDSET (-0.27%) closed at 1,930.71, 1,165.97, and 1,048.92 points, respectively. Large-cap sectors posted mixed performance today. NBFi booked the highest gain of 0.73%, followed by Telecommunication (+0.63%), Engineering (+0.05%), Food & Allied (-0.27%), Fuel & Power (-0.28%), Pharmaceutical (-0.28%), and Bank (-0.32%), respectively. Block trades contributed 4.2% of the overall market turnover. Bangladesh Shipping Corporation (+4.4%) was the most traded share with a turnover of BDT 333 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,196.70	5,205.19	-8.49	-0.16%	-0.4%
DS30	1,930.71	1,929.34	+1.37	+0.07%	-0.5%
DSES	1,165.97	1,167.83	-1.86	-0.16%	-0.3%
CDSET	1,048.92	1,051.74	-2.82	-0.27%	-1.6%

	Advanced	Declined	Unchanged	Total
All Category	150	191	57	398
A Category (Equity)	86	106	28	220
B Category (Equity)	34	41	8	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	30	44	21	95
Mutual Funds	5	22	9	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,734,215	6,766,548	-0.5%
	Mn USD	55,198	55,464	
Turnover	Mn BDT	4,699	4,155	+13.1%
	Mn USD	39	34	
Volume	Mn Shares	167	194	-13.9%
No. of Trade		152,149	140,441	+8.3%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 07, 2025

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Figure: Sectorial Turnover (BDT Mn)

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

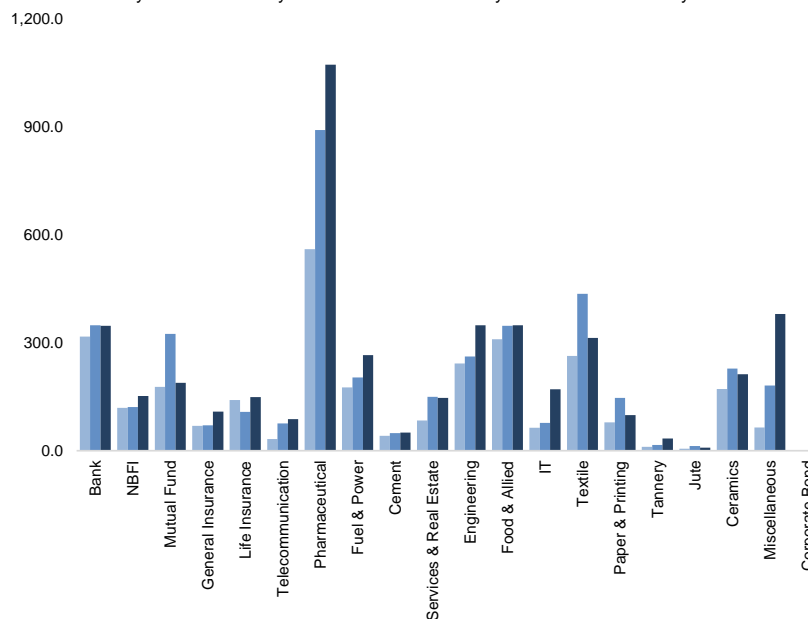
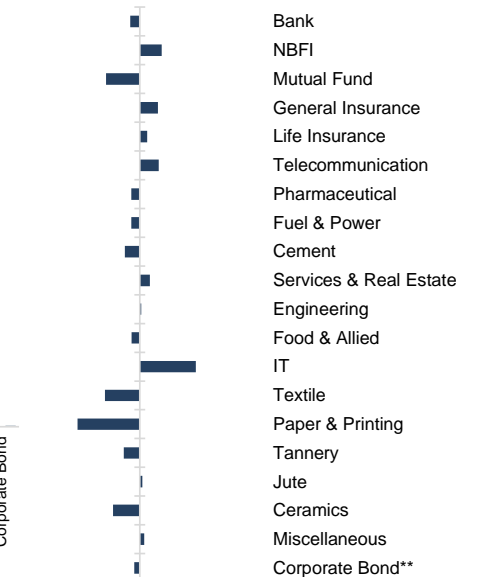


Figure: Sectorial Mcap Change

-4% -2% 0% 2% 4%



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	1,416	1,421	-4.48	-0.32%	36	670,078	10.0%	347.0	7.7%	8.5x	0.7x	GP	435,472	12.4%	27.8	12.0x	6.7x
NBFI	1,081	1,073	+7.83	+0.73%	23	103,019	1.5%	152.3	3.4%	NM	NM	SQURPHARMA	193,069	5.5%	120.6	8.6x	1.5x
Mutual Fund	647	654	-7.36	-1.12%	37	29,741	0.4%	188.8	4.2%	NM	0.6x	BATBC	173,016	4.9%	18.2	9.9x	3.0x
General Insurance	2,585	2,569	+15.68	+0.61%	43	73,791	1.1%	108.6	2.4%	13.1x	1.1x	WALTONHIL	139,377	4.0%	5.1	10.6x	1.3x
Life Insurance	1,795	1,790	+4.47	+0.25%	15	47,739	0.7%	149.2	3.3%	NM	NM	ROBI	137,758	3.9%	49.6	19.6x	2.0x
Telecommunication	5,088	5,056	+31.86	+0.63%	3	596,591	8.9%	87.5	1.9%	13.4x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,973	2,982	-8.40	-0.28%	34	563,701	8.4%	1,072.1	23.8%	13.6x	1.6x	BRACBANK	88,486	2.5%	54.6	8.0x	1.2x
Fuel & Power	1,083	1,086	-3.04	-0.28%	23	286,955	4.3%	265.2	5.9%	16.0x	0.6x	BERGERPBL	83,016	2.4%	0.1	24.2x	5.7x
Cement	1,753	1,762	-8.74	-0.50%	7	83,543	1.2%	50.7	1.1%	16.5x	1.9x	MARICO	76,343	2.2%	4.0	13.6x	10.0x
Services & Real Estate	1,019	1,016	+3.39	+0.33%	9	56,039	0.8%	146.8	3.3%	20.0x	0.4x	ISLAMIBANK	69,713	2.0%	13.9	14.9x	1.0x
Engineering	2,455	2,454	+1.30	+0.05%	42	276,975	4.1%	348.5	7.7%	12.6x	0.9x	RENATA	57,142	1.6%	21.4	19.3x	1.7x
Food & Allied	15,566	15,609	-42.74	-0.27%	21	284,824	4.2%	348.4	7.7%	15.5x	4.2x	LHB	52,494	1.5%	28.5	13.7x	2.8x
IT	1,972	1,936	+36.33	+1.88%	11	26,015	0.4%	170.6	3.8%	20.2x	1.7x	BXPHARMA	48,046	1.4%	269.4	7.5x	1.0x
Textile	1,079	1,091	-12.74	-1.17%	58	112,328	1.7%	313.2	7.0%	89.5x	0.8x	UNILEVERCL	47,583	1.4%	0.3	71.3x	19.5x
Paper & Printing	4,548	4,645	-96.47	-2.08%	6	20,547	0.3%	99.1	2.2%	NM	0.9x	ICB	44,230	1.3%	7.2	34.9x	1.0x
Tannery	1,925	1,935	-10.32	-0.53%	6	21,445	0.3%	34.1	0.8%	NM	1.6x	DUTCHBANGL	43,941	1.2%	4.6	7.0x	0.9x
Jute	11,813	11,803	+9.85	+0.08%	3	2,600	0.0%	8.4	0.2%	NM	NM	EBL	36,941	1.0%	37.2	5.6x	0.9x
Ceramics	430	434	-3.88	-0.89%	5	19,301	0.3%	212.1	4.7%	NM	1.2x	PUBALIBANK	33,201	0.9%	14.4	3.5x	0.6x
Miscellaneous	4,254	4,248	+6.48	+0.15%	15	231,031	3.4%	379.6	8.4%	95.1x	1.9x	POWERGRID	32,349	0.9%	3.0	NM	0.2x
Corporate Bond**	15,185	15,212	-27.39	-0.18%	16	33,257	0.5%	2.7	0.1%	NM	NM	CITYBANK	31,101	0.9%	22.4	4.3x	0.8x
Treasury Bond**	1,782	1,778	+4.08	+0.23%	235	3,194,215	47.4%	17.5	0.4%	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
FASFIN	3.9	+8.3%	4.9	NM	NM	SQURPHARMA	108,958	7.7%	8.6x	1.5x	BSC	94.1	+4.4%	332.5	4.9x	1.0x
MIDASFIN	10.6	+8.2%	9.8	NM	2.8x	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	BXPHARMA	107.7	-1.0%	269.4	7.5x	1.0x
YPL	13.1	+6.5%	2.0	NM	2.4x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	27.6	-3.8%	160.5	NM	0.9x
DAFODILCOM	64.2	+6.3%	0.6	NM	4.7x	BATBC	50,233	3.6%	9.9x	3.0x	ACI	201.9	+2.2%	146.2	NM	3.0x
FAREASTFIN	3.4	+6.3%	0.5	NM	NM	WALTONHIL	46,773	3.3%	10.6x	1.3x	SQURPHARMA	217.8	-1.0%	120.6	8.6x	1.5x
DGIC	25.6	+5.79%	11.0	31.6x	2.0x	BRACBANK	46,489	3.3%	8.0x	1.2x	ORIONINFU	383.0	-0.3%	102.0	NM	25.0x
ARAMIT	171.1	+5.4%	2.4	45.7x	1x	GP	44,708	3.2%	12.0x	6.7x	EHL	81.8	+1.9%	85.0	11.8x	1.0x
STANCERAM	68.9	+5.4%	0.1	NM	NM	RENATA	32,968	2.3%	19.3x	1.7x	INTRACO	24.2	+3.9%	81.7	24.7x	1.9x
SPCL	31.9	+5.3%	14.1	81.8x	0.8x	BXPHARMA	23,409	1.7%	7.5x	1.0x	RDFOOD	24.6	+1.2%	80.9	27.3x	1.4x
1JANATAMF	4.0	+5.3%	11.9	NM	0.4x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	AGNISYSL	28.0	+2.6%	79.8	18.8x	1.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	4.3x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SALAMCRST	27.1	-7.5%	63.9	NM	1.5x	LHB	20,953	1.5%	13.7x	2.8x	RENATA	501.7	501.7	2.0	150	75.26
STYLECRAFT	56.2	-5.9%	8.3	NM	10x	OLYMPIC	20,496	1.5%	15.8x	2.5x	BEACHHATCH	97.5	90.0	11.0	280	27.04
KPPL	25.4	-5.6%	22.6	NM	NM	ALARABANK	18,282	1.3%	14.7x	1.1x	KDSALTD	45.0	45.0	2.0	600	27.00
TRUSTB1MF	3.8	-5.0%	3.3	NM	0.4x	BEACONPHAR	17,838	1.3%	51.1x	4.5x	MERCANBANK	10.2	10.2	1.0	1,990	20.30
SONARGAON	40.3	-5.0%	9.9	NM	2.1x	PRIMEBANK	16,142	1.1%	3.8x	0.7x	MARICO	2,406.0	2,406.0	3.0	7	16.74
GHCL	21.3	-4.5%	2.1	NM	0.3x	ROBI	14,876	1.1%	19.6x	2.0x	RDFOOD	26.7	24.3	4.0	250	6.46
MAKSONSPIN	6.4	-4.5%	1.7	NM	0.7x	UTTARABANK	13,699	1.0%	8.2x	0.8x	JAMUNABANK	17.8	17.6	2.0	200	3.54
RSRMSTEEL	11.1	-4.3%	1.8	NM	0.2x	NBL	13,055	0.9%	NM	2.2x	BXPHARMA	111.5	111.5	1.0	28	3.13
ALARABANK	22.5	-4.3%	1.0	14.7x	1.1x	BSRMLTD	12,852	0.9%	5.1x	0.5x	ABB1STMF	4.7	4.7	2.0	426	2.00
HFL	9.6	-4.0%	1.8	NM	0.3x	* 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					SHEPHERD	16.2	16.2	1.0	100	1.62

* 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
RENATA	501.7	501.7	75.3	150	2
BEACHHATCH	97.5	90.0	27.0	280	11
KDSALTD	45.0	45.0	27.0	600	2
MERCANBANK	10.2	10.2	20.3	1,990	1
MARICO	2,406.0	2,406.0	16.7	7	3
RDFOOD	26.7	24.3	6.5	250	4
JAMUNABANK	17.8	17.6	3.5	200	2
BXPHARMA	111.5	111.5	3.1	28	1
ABB1STMF	4.7	4.7	2.0	426	2
SHEPHERD	16.2	16.2	1.6	100	1
RELIANCE1	21.0	21.0	1.6	75	3
SUNLIFEINS	70.0	70.0	1.5	21	1
BSC	92.0	92.0	1.4	16	1
TOSRIFA	23.5	23.5	1.2	50	1
ROBI	28.7	28.7	1.2	40	1
EASTRNLAB	2,200.0	2,200.0	1.1	1	1
SIBL	11.0	11.0	1.1	98	2
BEXIMCO	99.6	99.1	1.0	10	2
UNIONINS	28.5	28.5	0.9	31	1
SEMLLECMF	7.8	7.8	0.8	100	1
RUPALILIFE	92.5	92.5	0.7	8	1
LRBDL	16.0	16.0	0.7	45	1
Total			196.7		46

Important DSE News
PRIMEBANK

The company has informed that Mr. Azam J Chowdhury, a Director of the company, has completed his transfer of 8,500,000 shares of the company to his son Mr. Tanveer A. Chowdhury as per declaration disseminated by DSE on 27.03.2025.

HAKKANIPUL

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Hakkani Pulp & Paper Mills PLC.' instead of 'Hakkani Pulp & Paper Mills Ltd.' with effect from April 08, 2025. Other things (except name) will remain unchanged.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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