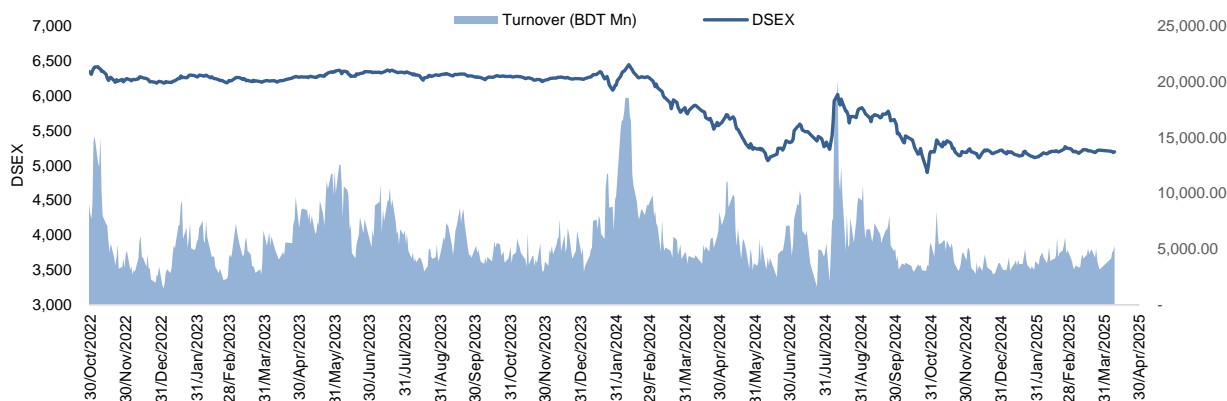


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.20%) gained 10.22 points and closed at 5,196.05. The blue-chip index DS30 (-0.15%), the Shariah-based index DSES (+0.22%), and the large-cap index CDSET (+0.25%) closed at 1,921.99, 1,169.69, and 1,048.90 points, respectively. Most of the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 1.87% followed by Engineering (+1.45%), Food & Allied (+1.18%), NBFI (+0.56%), Telecommunication (+0.20%), Bank (-0.15%), and Pharmaceutical (-0.28%), respectively. Block trades contributed 4.4% of the overall market turnover. Sunlife Insurance Company Limited (+3.6%) was the most traded share with a turnover of BDT 278 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,196.05	5,185.83	+10.22	+0.20%	-0.4%
DS30	1,921.99	1,924.89	-2.89	-0.15%	-0.9%
DSES	1,169.69	1,167.11	+2.58	+0.22%	+0.1%
CDSET	1,048.90	1,046.28	+2.62	+0.25%	-1.6%

	Advanced	Declined	Unchanged	Total
All Category	144	193	58	395
A Category (Equity)	89	101	27	217
B Category (Equity)	30	43	10	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	25	49	21	95
Mutual Funds	4	24	8	36
Corporate Bonds	0	0	2	2
Treasury Bonds	0	1	0	1

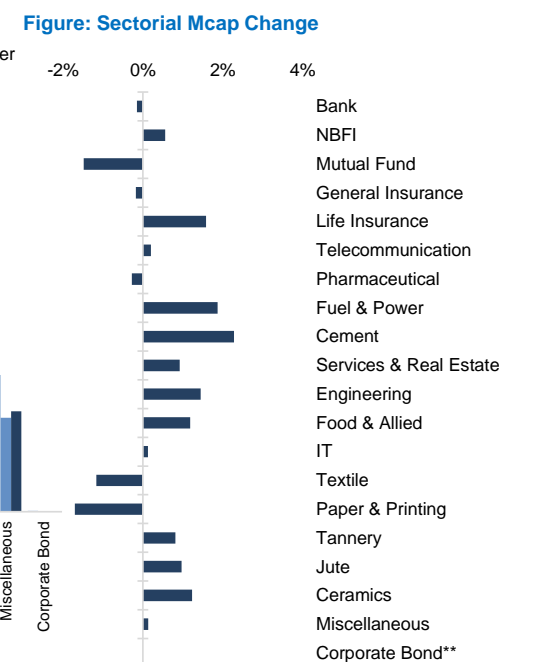
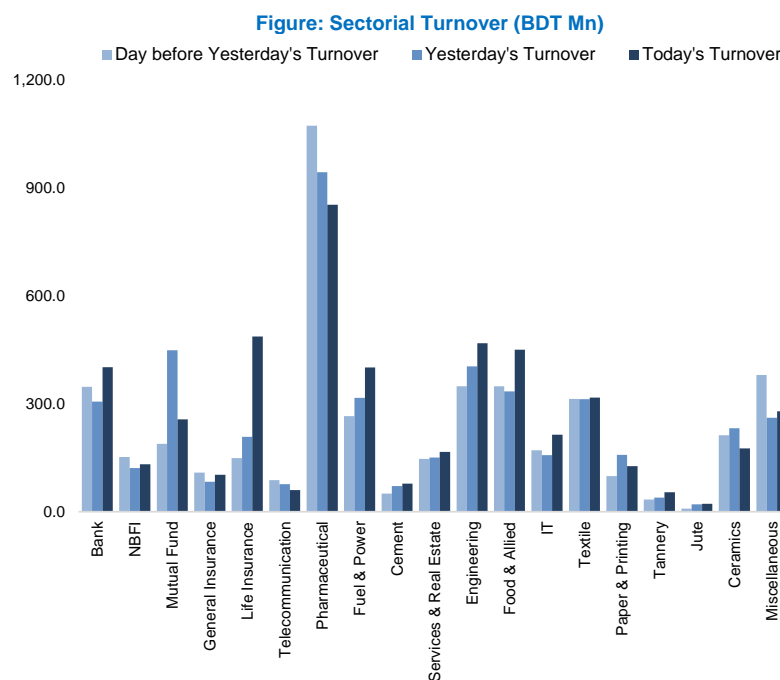
\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,734,408	6,717,792	+0.2%
	Mn USD	55,200	55,064	
Turnover	Mn BDT	5,272	4,836	+9.0%
	Mn USD	43	40	
Volume	Mn Shares	194	221	-12.3%
No. of Trade		168,092	162,881	+3.2%

\* Average Interbank Exchange Rate is BDT 122.00 as of Apr 09, 2025

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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	1,406	1,408	-2.08	-0.15%	36	665,085	9.9%	401.2	8.0%	8.4x	0.7x	GP	433,176	12.3%	21.4	11.9x	6.7x
NBFI	1,079	1,073	+5.99	+0.56%	23	102,799	1.5%	132.1	2.6%	NM	NM	SQURPHARMA	192,094	5.4%	37.2	8.6x	1.5x
Mutual Fund	661	671	-9.94	-1.48%	37	30,380	0.5%	256.4	5.1%	NM	0.6x	BATBC	175,392	5.0%	27.4	10.0x	3.0x
General Insurance	2,562	2,566	-4.58	-0.18%	43	73,129	1.1%	103.0	2.0%	13.0x	1.1x	WALTONHIL	141,861	4.0%	6.2	10.7x	1.3x
Life Insurance	1,842	1,813	+28.71	+1.58%	15	48,996	0.7%	486.3	9.6%	NM	NM	ROBI	136,710	3.9%	25.5	19.5x	2.0x
Telecommunication	5,065	5,055	+10.15	+0.20%	3	593,921	8.8%	60.0	1.2%	13.3x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,959	2,968	-8.17	-0.28%	34	561,037	8.4%	852.4	16.9%	13.4x	1.6x	BRACBANK	87,955	2.5%	35.4	7.9x	1.2x
Fuel & Power	1,113	1,092	+20.44	+1.87%	23	294,788	4.4%	400.3	7.9%	16.5x	0.6x	BERGERPBL	82,887	2.3%	1.1	24.1x	5.7x
Cement	1,822	1,781	+40.61	+2.28%	7	86,813	1.3%	78.1	1.5%	17.2x	1.9x	MARICO	75,827	2.1%	5.5	13.6x	10.0x
Services & Real Estate	1,022	1,013	+9.32	+0.92%	9	56,226	0.8%	166.0	3.3%	20.0x	0.4x	UPGDCL	71,303	2.0%	18.6	6.7x	1.9x
Engineering	2,491	2,456	+35.57	+1.45%	42	281,043	4.2%	468.1	9.3%	12.8x	0.9x	RENATA	57,039	1.6%	9.5	19.3x	1.7x
Food & Allied	15,765	15,581	+184.38	+1.18%	21	288,457	4.3%	449.7	8.9%	15.7x	4.3x	LHB	52,378	1.5%	0.0	13.7x	2.8x
IT	1,984	1,981	+2.56	+0.13%	11	26,165	0.4%	213.8	4.2%	20.3x	1.7x	UNILEVERCL	47,573	1.3%	0.7	71.3x	19.5x
Textile	1,059	1,072	-12.51	-1.17%	58	110,332	1.6%	316.7	6.3%	87.9x	0.7x	BXPHARMA	47,020	1.3%	168.1	7.3x	0.9x
Paper & Printing	4,581	4,660	-79.40	-1.70%	6	20,696	0.3%	126.9	2.5%	NM	0.9x	ICB	45,097	1.3%	14.4	35.6x	1.0x
Tannery	1,938	1,923	+15.64	+0.81%	6	21,598	0.3%	54.2	1.1%	NM	1.6x	DUTCHBANGL	43,502	1.2%	2.5	7.0x	0.9x
Jute	12,214	12,097	+117.01	+0.97%	3	2,689	0.0%	21.7	0.4%	NM	NM	EBL	36,534	1.0%	26.6	5.5x	0.9x
Ceramics	439	433	+5.33	+1.23%	5	19,682	0.3%	175.7	3.5%	NM	1.2x	POWERGRID	32,897	0.9%	14.3	NM	0.3x
Miscellaneous	4,247	4,241	+5.78	+0.14%	15	230,626	3.4%	278.6	5.5%	94.9x	1.9x	PUBALIBANK	32,623	0.9%	5.0	3.4x	0.6x
Corporate Bond**	15,198	15,198	-	-	16	33,287	0.5%	0.4	0.0%	NM	NM	OLYMPIC	31,270	0.9%	50.6	17.0x	2.7x
Treasury Bond**	1,808	1,796	+12.87	+0.72%	235	3,171,238	47.2%	0.4	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
CONFIDCEM	55.0	+10.0%	58.7	5.7x	0.7x	SQURPHARMA	108,958	7.7%	8.6x	1.5x	SUNLIFEINS	74.3	+3.6%	278.2	NM	NM
JMISMDL	152.5	+9.9%	29.2	53.5x	1.7x	ISLAMIBANK	74,730	5.3%	14.8x	0.9x	BSC	94.4	+1.1%	204.7	4.9x	1.0x
PADMALIFE	25.5	+9.9%	9.4	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	BXPHARMA	105.4	-3.5%	168.1	7.3x	0.9x
DOREENPWR	22.3	+9.9%	7.2	22.5x	0.4x	BATBC	50,233	3.6%	10.0x	3.0x	BEACHHATCH	89.0	-9.9%	146.6	26.1x	5.9x
HEIDELBCEM	251.6	+8.7%	3.7	38.6x	3.5x	WALTONHIL	46,773	3.3%	10.7x	1.3x	ACI	209.1	+4.2%	137.2	NM	3.1x
AMBEEPHA	883.7	+7.49%	17.1	NM	70.2x	BRACBANK	46,489	3.3%	7.9x	1.2x	SPCERAMICS	26.2	-4.7%	117.0	NM	0.9x
BARKAPOWER	10.2	+7.4%	6.5	24.3x	0x	GP	44,708	3.2%	11.9x	6.7x	EASTRNLUB	2,369.9	+1.9%	116.2	67.6x	11.4x
JUTESPINN	220.4	+6.4%	0.9	NM	NM	RENATA	32,968	2.3%	19.3x	1.7x	AGNISYSL	28.6	+3.2%	91.1	19.2x	1.6x
UPGDCL	123.0	+6.0%	18.6	6.7x	1.9x	BXPHARMA	23,409	1.7%	7.3x	0.9x	NAVANAPHAR	57.8	-4.3%	76.2	14.7x	1.3x
MEGHNACEM	46.8	+5.9%	3.2	NM	1.7x	PUBALIBANK	22,905	1.6%	3.4x	0.6x	IFADAUTOS	26.0	+5.7%	76.2	NM	0.7x
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)
BEACHHATCH	89.0	-9.9%	146.6	26.1x	5.9x	LHB	20,953	1.5%	13.7x	2.8x	WALTONHIL	462.3	462.3	1.0	173	80.00
NEWLINE	7.8	-9.3%	13.4	NM	0x	OLYMPIC	20,496	1.5%	17.0x	2.7x	LOVELLO	79.0	75.0	18.0	554	42.61
SONARGAON	36.1	-7.4%	22.0	NM	1.9x	ALARABANK	18,282	1.3%	15.0x	1.1x	MERCANBANK	10.2	10.2	1.0	1,990	20.30
EBL1STMF	5.7	-6.6%	3.0	NM	0.6x	BEACONPHAR	17,838	1.3%	49.7x	4.4x	ORIONINFU	413.0	384.0	3.0	39	15.52
SHARPIND	18.3	-6.2%	9.4	28.2x	1.8x	PRIMEBANK	16,142	1.1%	3.8x	0.7x	SUNLIFEINS	71.7	70.0	8.0	186	13.14
DSSL	9.9	-5.7%	24.7	33.0x	0.5x	ROBI	14,876	1.1%	19.5x	2.0x	SOUTHEASTB	9.9	9.9	1.0	1,200	11.88
NURANI	3.6	-5.3%	1.4	NM	0.4x	UTTARABANK	13,699	1.0%	7.8x	0.8x	MARICO	2,425.0	2,425.0	4.0	5	11.27
GSPFINANCE	5.6	-5.1%	2.8	NM	0.4x	NBL	13,055	0.9%	NM	2.2x	KBPWBIL	131.5	131.5	3.0	40	5.22
SALAMCRST	25.4	-4.9%	39.2	NM	1.4x	BSRMLTD	12,852	0.9%	5.1x	0.5x	BXPHARMA	108.0	108.0	2.0	38	4.07
VAMLRBBF	5.9	-4.8%	1.7	NM	0.5x						BEXIMCO	99.1	99.1	6.0	32	3.17

\* 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

\* 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	Important DSE News
WALTONHIL	462.3	462.3	80.0	173	1	<b>GLOBALINS</b> The company has informed that as per approval of Insurance Development and Regulatory Authority (IDRA) and recommendation of Board of Directors of the company, Mr. Md. Jamirul Islam has been appointed as the Chief Executive Officer (CEO) of the company.
LOVELLO	79.0	75.0	42.6	554	18	
MERCANBANK	10.2	10.2	20.3	1,990	1	
ORIONINFU	413.0	384.0	15.5	39	3	
SUNLIFEINS	71.7	70.0	13.1	186	8	
SOUTHEASTB	9.9	9.9	11.9	1,200	1	
MARICO	2,425.0	2,425.0	11.3	5	4	
KBPPWBIL	131.5	131.5	5.2	40	3	
BXPHARMA	108.0	108.0	4.1	38	2	
BEXIMCO	99.1	99.1	3.2	32	6	
SEMLLECMF	8.5	8.5	3.1	360	1	
BEACHHATCH	105.3	90.5	3.0	30	3	
LANKABAFIN	20.0	19.0	2.5	131	2	
AMANFEED	27.5	25.4	2.3	87	2	
RUNNERAUTO	29.0	29.0	2.2	75	1	
SIBL	10.8	10.8	1.6	150	2	
AL-HAJTEX	145.0	145.0	1.5	10	2	
ENVOYTEX	37.3	37.3	1.1	30	1	
IFIC	7.0	7.0	0.7	100	1	
AIBL1STIMF	7.5	7.5	0.7	92	1	
MONNOCERA	83.7	83.7	0.7	8	1	
LRBDL	13.3	13.3	0.7	50	1	
<b>Total</b>			<b>229.9</b>		<b>70</b>	

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
RECKITT BEN		0.0%	3330.0%	Record Date	29-Apr-25

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