

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.18%) gained 9.19 points and closed at 5,205.23. The blue-chip index DS30 (+0.31%), the Shariah-based index DSES (+0.28%), and the large-cap index CDSET (+0.12%) closed at 1,927.90, 1,172.96, and 1,050.11 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 0.50% followed by Food & Allied (-0.42%), Engineering (-0.30%), Fuel & Power (-0.23%), Bank (-0.19%), Telecommunication (+0.00%), and Pharmaceutical (+0.50%), respectively. Block trades contributed 7.3% of the overall market turnover. Bangladesh Shipping Corporation (+4.0%) was the most traded share with a turnover of BDT 383 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,205.23	5,196.05	+9.19	+0.18%	-0.2%
DS30	1,927.90	1,921.99	+5.91	+0.31%	-0.6%
DSES	1,172.96	1,169.69	+3.27	+0.28%	+0.3%
CDSET	1,050.11	1,048.90	+1.21	+0.12%	-1.5%

	Advanced	Declined	Unchanged	Total
All Category	149	168	78	395
A Category (Equity)	82	101	34	217
B Category (Equity)	29	41	13	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	38	26	31	95
Mutual Funds	13	7	16	36
Corporate Bonds	2	0	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,716,438	6,734,408	-0.3%
	Mn USD	55,053	55,200	
Turnover	Mn BDT	5,402	5,272	+2.5%
	Mn USD	44	43	
Volume	Mn Shares	211	194	+8.5%
	No. of Trade	159,988	168,092	-4.8%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 10, 2025

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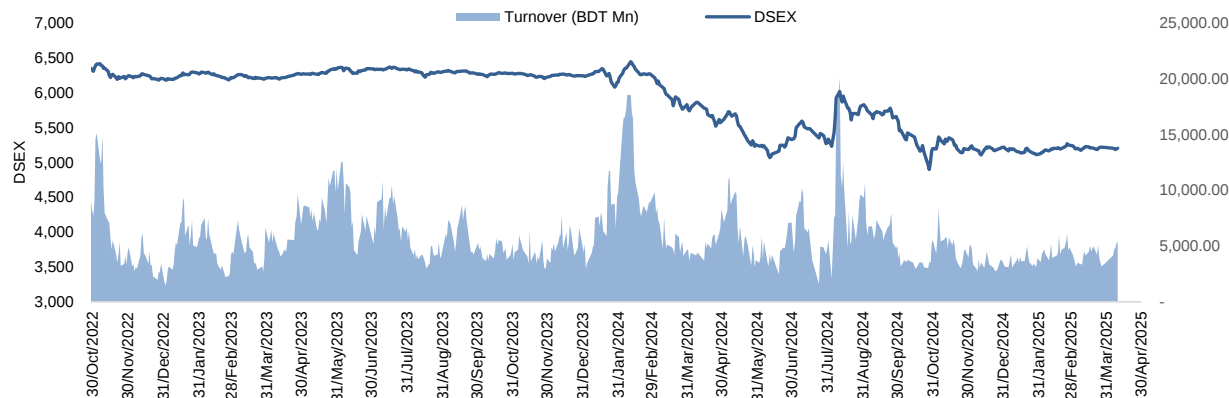


Figure: Sectorial Turnover (BDT Mn)

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

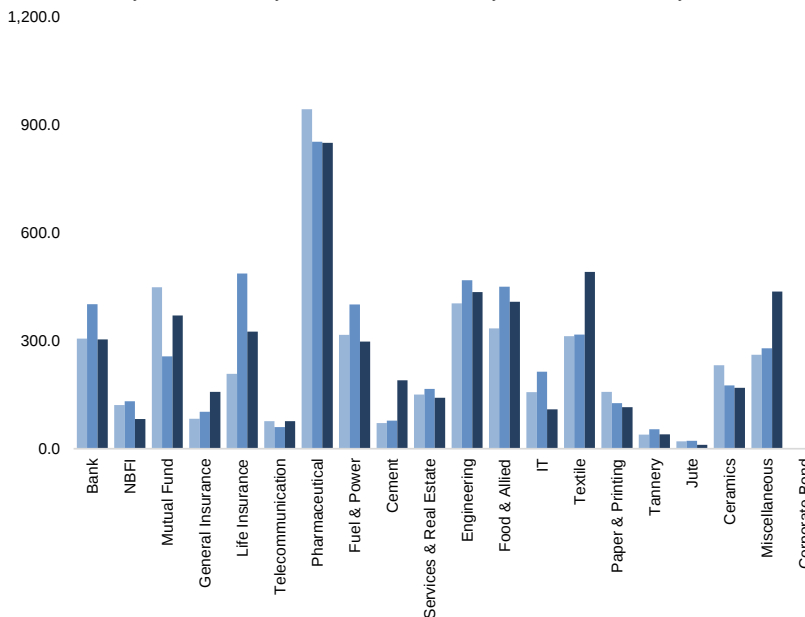
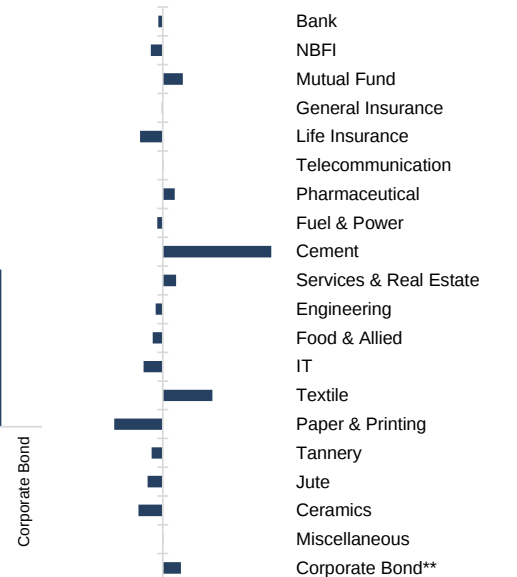


Figure: Sectorial Mcap Change

-5% 0% 5%



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	1,403	1,406	-2.67	-0.19%	36	663,821	9.9%	303.8	6.1%	8.4x	0.7x	GP	432,906	12.2%	42.9	11.9x	6.7x
NBFI	1,073	1,079	-5.40	-0.50%	23	102,285	1.5%	82.6	1.6%	NM	NM	SQURPHARMA	194,133	5.5%	73.2	8.7x	1.5x
Mutual Fund	667	661	+5.56	+0.84%	37	30,636	0.5%	369.7	7.4%	NM	0.6x	BATBC	173,988	4.9%	30.5	9.9x	3.0x
General Insurance	2,561	2,562	-0.88	-0.03%	43	73,104	1.1%	157.8	3.2%	13.0x	1.1x	WALTONHIL	140,498	4.0%	5.1	10.6x	1.3x
Life Insurance	1,825	1,842	-17.58	-0.95%	15	48,528	0.7%	325.5	6.5%	NM	NM	ROBI	137,234	3.9%	27.0	19.6x	2.0x
Telecommunication	5,065	5,065	+0.09	+0.00%	3	593,931	8.9%	76.3	1.5%	13.3x	4.0x	BEXIMCO	103,850	2.9%	0.3	NM	1.3x
Pharmaceutical	2,974	2,959	+14.78	+0.50%	34	563,839	8.4%	849.5	17.0%	13.4x	1.6x	BRACBANK	88,663	2.5%	14.1	8.0x	1.2x
Fuel & Power	1,110	1,113	-2.59	-0.23%	23	294,102	4.4%	297.6	5.9%	16.4x	0.6x	BERGERPBL	82,798	2.3%	0.8	24.1x	5.7x
Cement	1,904	1,822	+82.46	+4.53%	7	90,743	1.4%	189.9	3.8%	18.0x	2.0x	MARICO	76,239	2.2%	6.5	13.6x	10.0x
Services & Real Estate	1,028	1,022	+5.64	+0.55%	9	56,536	0.8%	141.7	2.8%	20.2x	0.4x	UPGDCL	71,476	2.0%	9.7	6.7x	1.9x
Engineering	2,484	2,491	-7.47	-0.30%	42	280,200	4.2%	435.1	8.7%	12.7x	0.9x	RENATA	57,279	1.6%	6.2	19.4x	1.7x
Food & Allied	15,699	15,765	-65.66	-0.42%	21	287,255	4.3%	407.8	8.1%	15.7x	4.3x	LHB	55,398	1.6%	101.0	14.5x	3.0x
IT	1,968	1,984	-15.97	-0.81%	11	25,954	0.4%	109.3	2.2%	20.1x	1.7x	UNILEVERCL	47,744	1.4%	0.1	71.6x	19.5x
Textile	1,081	1,059	+21.97	+2.07%	58	112,620	1.7%	490.7	9.8%	89.8x	0.8x	BXPHARMA	46,976	1.3%	174.1	7.3x	0.9x
Paper & Printing	4,488	4,581	-92.97	-2.03%	6	20,276	0.3%	115.4	2.3%	NM	0.9x	ICB	44,577	1.3%	13.3	35.2x	1.0x
Tannery	1,929	1,938	-9.12	-0.47%	6	21,496	0.3%	40.2	0.8%	NM	1.6x	DUTCHBANGL	42,447	1.2%	7.9	6.8x	0.9x
Jute	12,136	12,214	-77.71	-0.64%	3	2,671	0.0%	11.0	0.2%	NM	NM	EBL	36,534	1.0%	12.1	5.5x	0.9x
Ceramics	434	439	-4.48	-1.02%	5	19,481	0.3%	168.8	3.4%	NM	1.2x	PUBALIBANK	32,391	0.9%	9.6	3.4x	0.6x
Miscellaneous	4,247	4,247	+0.46	+0.01%	15	230,651	3.4%	436.1	8.7%	94.9x	1.9x	POWERGRID	32,349	0.9%	6.0	NM	0.2x
Corporate Bond**	15,314	15,198	+115.97	+0.76%	16	33,541	0.5%	0.6	0.0%	NM	NM	MJLBD	30,915	0.9%	27.6	9.4x	2.0x
Treasury Bond**	1,816	1,808	+7.40	+0.41%	235	3,149,524	47.0%	0.0	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
ECABLES	119.7	+9.9%	6.3	NM	0.3x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	BSC	98.2	+4.0%	383.3	5.1x	1.0x
HEIDELBCEM	273.6	+8.7%	52.2	42.0x	3.8x	ISLAMIBANK	74,730	5.3%	14.7x	0.9x	BEACHHATCH	95.6	+7.4%	219.1	28.0x	6.3x
NURANI	3.9	+8.3%	0.6	NM	0.4x	BEXIMCO	69,463	4.9%	NM	1.3x	BXPHARMA	105.3	-0.1%	174.1	7.3x	0.9x
DSSL	10.7	+8.1%	38.2	35.7x	0.6x	BATBC	50,233	3.6%	9.9x	3.0x	SUNLIFEINS	71.3	-4.0%	164.9	NM	NM
HRTEX	34.9	+7.7%	25.8	NM	1.9x	WALTONHIL	46,773	3.3%	10.6x	1.3x	ORIONINFU	396.0	+4.2%	145.3	NM	25.8x
BEACHHATCH	95.6	+7.42%	219.1	28.0x	6.3x	BRACBANK	46,489	3.3%	8.0x	1.2x	ABB1STMF	5.4	+3.8%	113.5	NM	0.6x
GLDNJMF	8.7	+6.1%	36.4	NM	1x	GP	44,708	3.2%	11.9x	6.7x	SPCERAMICS	25.8	-1.5%	104.1	NM	0.9x
LHB	47.7	+5.8%	101.0	14.5x	3.0x	RENATA	32,968	2.3%	19.4x	1.7x	LHB	47.7	+5.8%	101.0	14.5x	3.0x
ETL	9.8	+5.4%	24.1	42.5x	0.8x	BXPHARMA	23,409	1.7%	7.3x	0.9x	GPHISPAT	22.1	+3.8%	81.7	12.2x	0.4x
SONARGAON	38.0	+5.3%	12.4	NM	2.0x	PUBALIBANK	22,905	1.6%	3.4x	0.6x	NAVANAPHAR	58.9	+1.9%	78.2	15.0x	1.3x
						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%	14.5x	3.0x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FASFIN	3.7	-7.5%	1.6	NM	NM	OLYMPIC	20,496	1.5%	16.8x	2.7x	BANKASIA	18.0	18.0	1.0	4,664	83.95
BARKAPOWER	9.7	-4.9%	3.6	23.1x	0x	ALARABANK	18,282	1.3%	15.3x	1.1x	BEACHHATCH	96.0	84.9	35.0	877	78.51
MIRACLEIND	28.4	-4.7%	6.1	NM	1.5x	BEACONPHAR	17,838	1.3%	49.6x	4.4x	WALTONHIL	464.0	464.0	1.0	151	70.00
IBP	11.0	-4.3%	15.5	NM	0.8x	PRIMEBANK	16,142	1.1%	3.8x	0.7x	RENATA	497.3	497.3	1.0	100	49.73
IFILISLMF1	4.4	-4.3%	4.2	NM	0.7x	ROBI	14,876	1.1%	19.6x	2.0x	SUNLIFEINS	81.2	66.9	8.0	467	36.35
PRIMELIFE	41.1	-4.2%	14.5	NM	NM	UTTARABANK	13,699	1.0%	7.7x	0.8x	MERCANBANK	10.2	10.2	3.0	2,398	24.46
SUNLIFEINS	71.3	-4.0%	164.9	NM	NM	NBL	13,055	0.9%	NM	2.1x	SQURPHARMA	217.2	217.0	3.0	103	22.37
LINDEBD	902.4	-4.0%	29.8	2.1x	3.9x	BSRMLTD	12,852	0.9%	5.1x	0.5x	ABB1STMF	5.1	5.1	2.0	688	3.51
DBH1STMF	4.8	-4.0%	2.0	NM	0.5x						CLICL	55.0	55.0	1.0	57	3.14
AMBEEPHA	850.9	-3.7%	23.3	NM	67.6x						GP	327.9	327.9	1.0	8	2.62

* NBFJ 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
BANKASIA	18.0	18.0	84.0	4,664	1	MJLBD The company has informed that Mr. Abdul Mueyed Chowdhury has been appointed as the Chairman of the company.
BEACHHATCH	96.0	84.9	78.5	877	35	
WALTONHIL	464.0	464.0	70.0	151	1	
RENATA	497.3	497.3	49.7	100	1	
SUNLIFEINS	81.2	66.9	36.4	467	8	
MERCANBANK	10.2	10.2	24.5	2,398	3	
SQURPHARMA	217.2	217.0	22.4	103	3	
ABB1STMF	5.1	5.1	3.5	688	2	
CLICL	55.0	55.0	3.1	57	1	
GP	327.9	327.9	2.6	8	1	
IFADAUTOS	26.0	26.0	2.6	100	1	
ACFL	17.7	17.7	2.4	135	1	
EASTRNLUB	2,270.0	2,261.0	2.2	1	2	
ACIFORMULA	139.0	139.0	1.4	10	1	
KDSALTD	46.0	46.0	1.4	30	1	
SAMORITA	67.8	67.8	1.2	18	1	
CONTININS	27.3	27.3	1.1	40	1	
BEXIMCO	99.1	99.1	1.0	10	2	
INTRACO	23.7	23.7	0.7	30	1	
EBL1STMF	5.9	5.9	0.6	100	1	
BEACONPHAR	123.0	123.0	0.6	5	1	
LHB	44.6	44.6	0.5	11	1	
Total			392.3		74	

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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