

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.32%) gained 14.91 points and closed at 4,724.00. The blue-chip index DS30 (+0.52%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (+0.37%) closed at 1,771.55, 1,028.67, and 972.75 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 2.48%, followed by Pharmaceutical (+0.64%), Bank (+0.34%), NBFI (+0.22%), Fuel & Power (-0.18%), Telecommunication (-0.63%), and Engineering (-0.64%), respectively. Block trades contributed 5.0% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+7.9%) was the most traded share with a turnover of BDT 253 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,724.00	4,709.09	+14.91	+0.32%	-9.4%
DS30	1,771.55	1,762.37	+9.18	+0.52%	-8.7%
DSES	1,028.67	1,028.90	-0.23	-0.02%	-12.0%
CDSET	972.75	969.16	+3.59	+0.37%	-8.8%

	Advanced	Declined	Unchanged	Total
All Category	145	179	68	392
A Category (Equity)	80	96	38	214
B Category (Equity)	41	29	14	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	24	54	16	94
Mutual Funds	6	11	18	35
Corporate Bonds	1	0	0	1
Treasury Bonds	3	1	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,463,648	6,505,914	-0.6%
	Mn USD	52,569	52,913	
Turnover	Mn BDT	2,630	2,245	+17.2%
	Mn USD	21	18	
Volume	Mn Shares	107	83	+29.1%
	No. of Trade	94,135	77,709	+21.1%

* Average Interbank Exchange Rate is BDT 122.96 as of Jun 15, 2025

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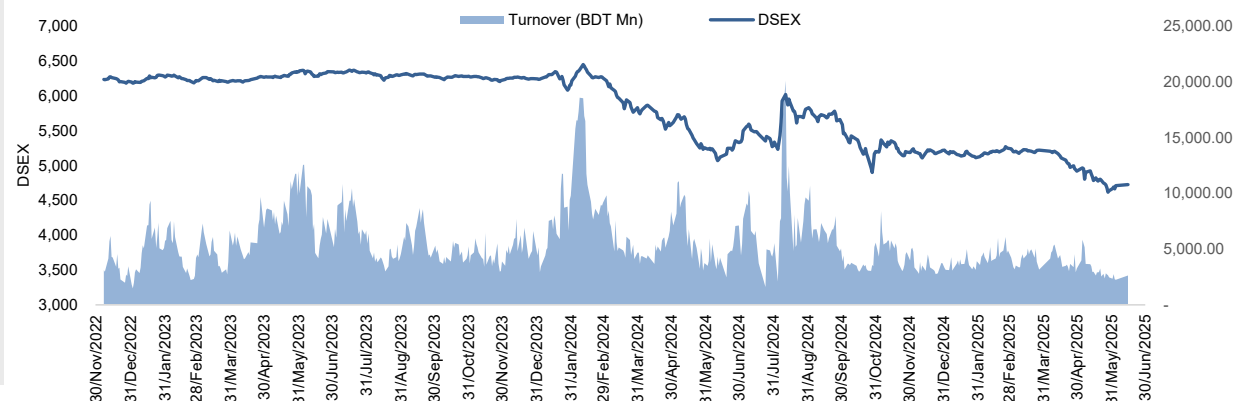


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

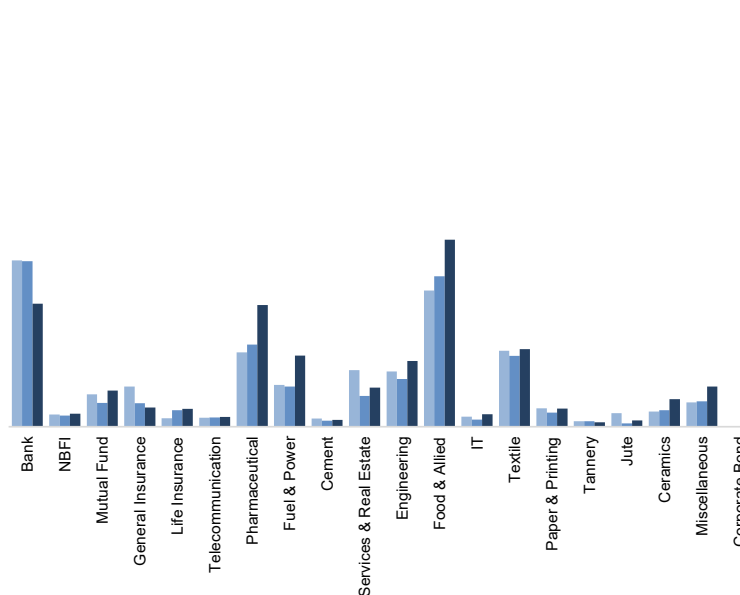
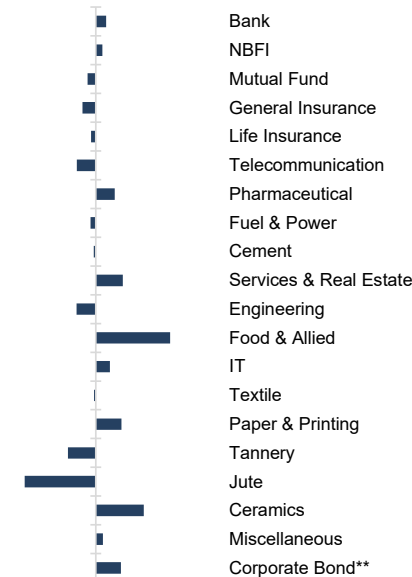


Figure: Sectorial Mcap Change

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



Market PE 12.7x

Market PB 1.0x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFI, ABBANK, IFIC, FIRSTSBANK 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	1,299	1,294	+4.44	+0.34%	36	614,516	9.5%	341.2	13.7%	17.8x	0.6x	GP	383,890	11.9%	9.5	13.1x	5.4x
NBFI	932	930	+2.00	+0.22%	23	88,832	1.4%	36.1	1.4%	NM	NM	SQURPHARMA	180,659	5.6%	38.4	7.7x	1.3x
Mutual Fund	614	615	-1.66	-0.27%	37	28,210	0.4%	100.4	4.0%	NM	0.5x	BATBC	148,770	4.6%	31.6	9.0x	2.8x
General Insurance	2,325	2,335	-10.34	-0.44%	43	66,302	1.0%	53.3	2.1%	11.2x	1.0x	ROBI	124,663	3.9%	16.9	17.2x	1.8x
Life Insurance	1,530	1,533	-2.47	-0.16%	15	40,702	0.6%	49.7	2.0%	NM	NM	WALTONHIL	120,020	3.7%	3.4	9.3x	1.0x
Telecommunication	4,525	4,554	-28.74	-0.63%	3	530,605	8.2%	27.4	1.1%	14.0x	3.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,728	2,711	+17.25	+0.64%	34	517,200	8.0%	337.7	13.5%	11.9x	1.4x	BRACBANK	99,944	3.1%	152.3	7.4x	1.2x
Fuel & Power	1,048	1,050	-1.86	-0.18%	23	277,571	4.3%	197.3	7.9%	17.5x	0.6x	BERGERPBL	80,841	2.5%	2.6	23.6x	5.6x
Cement	1,673	1,674	-1.09	-0.07%	7	79,740	1.2%	18.7	0.7%	19.1x	1.7x	MARICO	75,203	2.3%	3.0	12.7x	10.0x
Services & Real Estate	901	893	+8.09	+0.91%	9	49,531	0.8%	108.5	4.3%	22.8x	0.4x	UPGDCL	68,462	2.1%	1.4	5.9x	1.6x
Engineering	2,172	2,186	-14.04	-0.64%	42	245,024	3.8%	182.3	7.3%	11.3x	0.7x	ISLAMIBANK	53,774	1.7%	2.3	11.5x	0.7x
Food & Allied	14,020	13,680	+339.94	+2.48%	21	256,533	4.0%	519.1	20.8%	14.8x	4.1x	LHB	50,287	1.6%	11.1	14.0x	2.5x
IT	1,647	1,639	+7.66	+0.47%	11	21,720	0.3%	34.9	1.4%	18.3x	1.4x	UNILEVERCL	45,564	1.4%	0.9	78.4x	17.6x
Textile	982	982	-0.56	-0.06%	58	102,242	1.6%	215.0	8.6%	NM	0.7x	ICB	40,241	1.3%	6.7	NM	1.0x
Paper & Printing	3,918	3,885	+33.39	+0.86%	6	17,701	0.3%	50.7	2.0%	NM	0.8x	BXPBARMA	38,678	1.2%	15.5	6.0x	0.8x
Tannery	1,827	1,844	-17.07	-0.93%	6	20,356	0.3%	12.2	0.5%	62.6x	1.5x	DUTCHBANGL	37,798	1.2%	1.1	8.7x	0.7x
Jute	9,947	10,188	-241.79	-2.37%	3	2,189	0.0%	17.5	0.7%	NM	NM	EBL	35,906	1.1%	9.5	5.3x	0.7x
Ceramics	366	360	+5.76	+1.60%	5	16,398	0.3%	76.5	3.1%	NM	1.0x	PUBALIBANK	32,536	1.0%	1.6	4.1x	0.6x
Miscellaneous	4,113	4,103	+9.82	+0.24%	15	223,348	3.5%	111.7	4.5%	87.9x	1.8x	OLYMPIC	30,031	0.9%	4.5	16.2x	2.5x
Corporate Bond**	15,503	15,374	+129.21	+0.84%	16	33,955	0.5%	1.5	0.1%	NM	NM	CITYBANK	29,360	0.9%	27.8	2.9x	0.6x
Treasury Bond**	2,015	2,008	+7.65	+0.38%	234	3,230,264	50.0%	5.8	0.2%	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	
ASIATICLAB	36.3	+10.0%	71.5	15.0x	0.7x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	LOVELLO	95.7	+7.9%	252.7	43.1x	7.6x	
DSHGARME	83.3	+9.9%	10.1	NM	4.5x	ISLAMIBANK	74,730	5.3%	11.5x	0.7x	BRACBANK	50.2	+2.4%	152.3	7.4x	1.2x	
BEACHHATCH	45.6	+9.9%	136.9	9.7x	2.8x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	45.6	+9.9%	136.9	9.7x	2.8x	
LOVELLO	95.7	+7.9%	252.7	43.1x	7.6x	BATBC	50,233	3.6%	9.0x	2.8x	ASIATICLAB	36.3	+10.0%	71.5	15.0x	0.7x	
FIRSTFIN	3.5	+6.1%	0.5	NM	NM	WALTONHIL	46,773	3.3%	9.3x	1.0x	SEAPEARL	50.0	+1.4%	64.6	NM	3.0x	
TECHNODRUG	28.2	+6.02%	37.4	NM	0.9x	BRACBANK	46,489	3.3%	7.4x	1.2x	EASTRNLUB	2,406.7	+5.0%	59.1	57.4x	12.5x	
PLFSL	1.9	+5.6%	0.5	NM	NM	GP	44,708	3.2%	13.1x	5.4x	SPCERAMICS	21.9	+0.9%	56.3	NM	0.7x	
EASTRNLUB	2,406.7	+5.0%	59.1	57.4x	12.5x	RENATA	32,968	2.3%	19.5x	1.6x	BSC	90.0	+1.6%	52.6	4.6x	0.9x	
AIL	45.1	+4.9%	27.8	16.7x	1.9x	BXPHARMA	23,409	1.7%	6.0x	0.8x	BPPL	15.2	+1.3%	47.4	66.1x	0.6x	
VAMLBDMF1	6.6	+4.8%	0.0	NM	0.6x	PUBALIBANK	22,905	1.6%	4.1x	0.6x	KBPPWBIL	114.4	-0.9%	46.5	NM	9.6x	
						CITYBANK	21,020	1.5%	2.9x	0.6x							
						LHB	20,953	1.5%	14.0x	2.5x							
						OLYMPIC	20,496	1.5%	16.2x	2.5x							
						ALARABANK	18,282	1.3%	36.2x	0.8x							
						BEACONPHAR	17,838	1.3%	28.6x	3.8x							
						PRIMEBANK	16,142	1.1%	3.1x	0.6x							
						ROBI	14,876	1.1%	17.2x	1.8x							
						UTTARABANK	13,699	1.0%	NM	0.6x							
						NBL	13,055	0.9%	NM	8.2x							
						BSRMLTD	12,852	0.9%	4.2x	0.4x							
						* 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											
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB							Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PHENIXINS	21.3	-8.6%	0.1	15.0x	0.6x							LOVELLO	92.0	85.0	23.0	778	67.68
PADMALIFE	18.0	-7.2%	0.3	NM	NM							NCCBANK	9.0	9.0	2.0	3,465	31.18
ANLIMAYARN	20.2	-6.9%	0.0	NM	3.2x							SEMLLECMF	11.0	10.2	4.0	778	8.15
SHYAMPSUG	125.3	-6.5%	0.7	NM	NM							RELIANCE1	17.5	17.5	3.0	346	6.06
NURANI	3.0	-6.3%	0.1	NM	0.3x							FINEFOODS	218.5	211.0	3.0	25	5.34
JUTESPINN	197.7	-5.5%	0.1	NM	NM							CAPMIBBLMF	8.6	8.6	1.0	297	2.55
ALIF	5.7	-5.0%	3.0	20.4x	0.4x							GEMINISEA	111.0	111.0	2.0	20	2.22
UTTARAFIN	9.7	-4.9%	0.3	NM	0.1x							EASTRNLUB	2,400.0	2,350.0	2.0	1	1.54
NEWLINE	6.1	-4.7%	2.0	NM	0.2x							APEXFOODS	170.0	170.0	1.0	8	1.36
FAMILYTEX	2.2	-4.3%	0.4	NM	0.2x							LRBDL	13.4	13.4	1.0	100	1.34

* 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
LOVELLO	92.0	85.0	67.7	778	23
NCCBANK	9.0	9.0	31.2	3,465	2
SEMLLECMF	11.0	10.2	8.2	778	4
RELIANCE1	17.5	17.5	6.1	346	3
FINEFOODS	218.5	211.0	5.3	25	3
CAPMIBBLMF	8.6	8.6	2.6	297	1
GEMINISEA	111.0	111.0	2.2	20	2
EASTRNLU	2,400.0	2,350.0	1.5	1	2
APEXFOODS	170.0	170.0	1.4	8	1
LRBDL	13.4	13.4	1.3	100	1
MONNOFABR	13.2	13.2	1.1	84	1
ABB1STMF	4.5	4.5	1.1	245	1
AIL	44.0	44.0	0.8	18	1
SIMTEX	15.4	15.4	0.8	51	1
MAGURAPLEX	81.7	81.7	0.6	7	1
CLICL	48.3	48.3	0.5	11	1
BEACONPHAR	100.0	100.0	0.5	5	1

Total	132.8	49
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Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
FEDERALINS		0.0%	10.0%	Record Date	16-Jun-25
ISLAMIINS		0.0%	20.0%	Record Date	18-Jun-25
ICICL		0.0%	10.0%	Record Date	18-Jun-25
AGRANINS		6.0%	0.0%	Record Date	18-Jun-25
ILFSL		0.0%	0.0%	Record Date	19-Jun-25
NITOLINS		5.0%	5.0%	Record Date	24-Jun-25
ONEBANKPLC		0.0%	0.0%	Record Date	24-Jun-25
DHAKABANK		5.0%	5.0%	Record Date	25-Jun-25
SICL		0.0%	5.0%	Record Date	26-Jun-25
PHOENIXFIN		0.0%	0.0%	Record Date	26-Jun-25
SBACBANK		0.0%	0.0%	Record Date	26-Jun-25
NRBCBANK		0.0%	0.0%	Record Date	26-Jun-25
ABBANK		0.0%	0.0%	Record Date	26-Jun-25
PURABIGEN		0.0%	10.0%	Record Date	29-Jun-25
ALARABANK		0.0%	0.0%	Record Date	29-Jun-25

Important DSE News

PREMIERCEM

Refer to their earlier news disseminated by DSE on 07.11.2024 regarding Issuance of Redeemable Non-Convertible Preference Shares, the Bangladesh Securities and Exchange Commission has informed the company, among others, the following: ".....the Commission is not in a position to accord consent for issuance of 322 number of fully redeemable, non-convertible, non-participating, cumulative preference shares at Tk. 50 lacs each amounting to Tk. 161 crore (Tk one sixty-one crore) due to not having the scope in the Memorandum of Association of the company to issue preference shares..."

BRACBANK

The company has informed that the Board of Directors of the company, on June 04, 2025, through 'Resolution by Circulation' has approved to issue "BRAC Bank Social Subordinated Bond". The proposed bond will be Non-Convertible, Unsecured, Fully Redeemable, Coupon-Bearing, Floating Rate, Social Subordinated Bond of up to BDT 1,000 Crore (Taka One Thousand Crore), with a tenure of 07 years through private placement. It will be issued to strengthen the Bank's Tier-II capital and support its commitment to social development, subject to approval of the Regulatory Authorities.

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