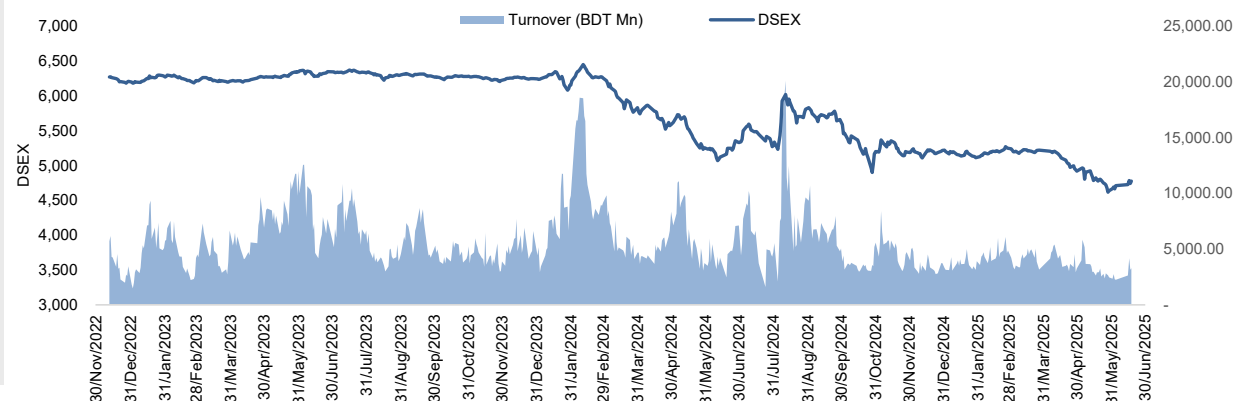


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.78%) gained 37.14 points and closed at 4,776.83. The blue-chip index DS30 (+0.97%), the Shariah-based index DSES (+0.85%), and the large-cap index CDSET (+0.82%) closed at 1,787.45, 1,042.64, and 980.60 points, respectively. All of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 2.66% followed by Telecommunication (+2.10%), Pharmaceutical (+0.73%), Engineering (+0.66%), Fuel & Power (+0.53%), NBFI (+0.40%), and Bank (+0.25%), respectively. Block trades contributed 11.7% of the overall market turnover. Beach Hatchery Ltd. (+2.7%) was the most traded share with a turnover of BDT 135 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,776.83	4,739.69	+37.14	+0.78%	-8.4%
DS30	1,787.45	1,770.21	+17.24	+0.97%	-7.9%
DSES	1,042.64	1,033.81	+8.84	+0.85%	-10.8%
CDSET	980.60	972.61	+7.99	+0.82%	-8.0%

1,200.0

Figure: Sectorial Turnover (BDT Mn)

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

900.0

Figure: Sectorial Mcap Change

-2% 0% 2% 4% 6%

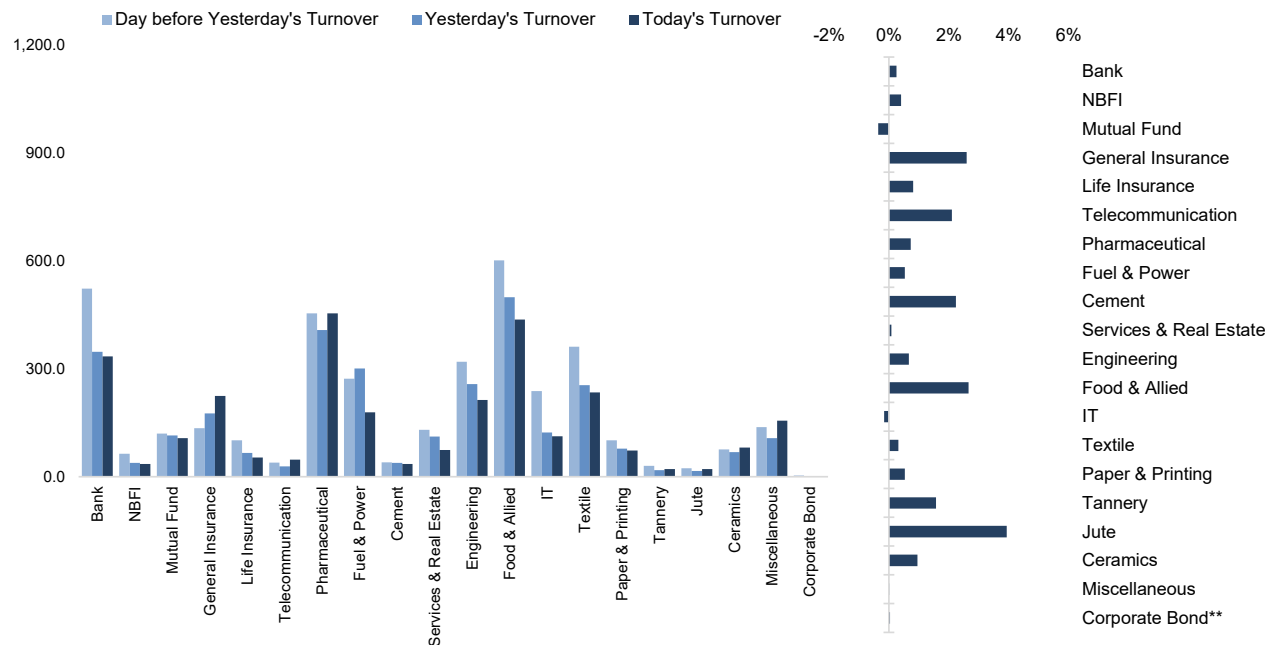
	Advanced	Declined	Unchanged	Total
All Category	202	112	82	396
A Category (Equity)	132	41	43	216
B Category (Equity)	38	30	16	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	32	41	23	96
Mutual Funds	7	10	19	36
Corporate Bonds	1	1	0	2
Treasury Bonds	2	1	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,514,061	6,486,473	+0.4%
	Mn USD	53,043	52,819	
Turnover	Mn BDT	3,278	3,136	+4.5%
	Mn USD	27	26	
Volume	Mn Shares	125	138	-9.0%
No. of Trade		111,400	118,295	-5.8%

* Average Interbank Exchange Rate is BDT 122.81 as of Jun 18, 2025

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Market PE 12.9x

Market PB 1.1x

* 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	1,302	1,299	+3.25	+0.25%	36	615,970	9.5%	333.8	11.5%	17.9x	0.6x	GP	393,477	12.1%	27.7	13.4x	5.5x
NBFI	934	931	+3.74	+0.40%	23	89,047	1.4%	35.4	1.2%	NM	NM	SQURPHARMA	181,988	5.6%	116.8	7.7x	1.4x
Mutual Fund	611	613	-2.17	-0.35%	37	28,081	0.4%	107.2	3.7%	NM	0.5x	BATBC	154,926	4.8%	50.5	9.4x	2.9x
General Insurance	2,442	2,380	+61.84	+2.60%	43	69,638	1.1%	224.7	7.8%	11.7x	1.0x	ROBI	127,282	3.9%	19.3	17.6x	1.8x
Life Insurance	1,553	1,541	+12.51	+0.81%	15	41,311	0.6%	53.7	1.9%	NM	NM	WALTONHIL	123,564	3.8%	3.5	9.6x	1.1x
Telecommunication	4,629	4,533	+95.22	+2.10%	3	542,755	8.4%	47.5	1.6%	14.4x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,741	2,721	+19.92	+0.73%	34	519,612	8.0%	453.5	15.7%	12.0x	1.4x	BRACBANK	98,949	3.0%	94.5	7.3x	1.2x
Fuel & Power	1,061	1,056	+5.63	+0.53%	23	281,097	4.3%	178.8	6.2%	17.7x	0.6x	BERGERPBL	82,066	2.5%	9.0	23.9x	5.7x
Cement	1,735	1,697	+38.03	+2.24%	7	82,687	1.3%	35.3	1.2%	19.8x	1.8x	MARICO	74,806	2.3%	6.9	12.7x	9.9x
Services & Real Estate	896	895	+0.77	+0.09%	9	49,268	0.8%	74.6	2.6%	22.7x	0.4x	UPGDCL	69,621	2.1%	1.4	6.0x	1.7x
Engineering	2,218	2,204	+14.64	+0.66%	42	250,251	3.9%	213.0	7.4%	11.5x	0.8x	ISLAMIBANK	53,935	1.7%	3.7	11.6x	0.7x
Food & Allied	14,357	13,985	+371.85	+2.66%	21	262,686	4.1%	436.4	15.1%	15.2x	4.2x	LHB	52,494	1.6%	25.2	14.6x	2.6x
IT	1,680	1,683	-2.77	-0.16%	11	22,158	0.3%	112.3	3.9%	18.6x	1.4x	UNILEVERCL	44,474	1.4%	0.5	76.5x	17.2x
Textile	990	987	+3.09	+0.31%	58	103,113	1.6%	233.9	8.1%	NM	0.7x	ICB	39,720	1.2%	5.3	NM	0.9x
Paper & Printing	3,917	3,897	+20.54	+0.53%	6	17,697	0.3%	72.7	2.5%	NM	0.8x	BXPBARMA	38,321	1.2%	27.6	6.0x	0.8x
Tannery	1,842	1,814	+28.55	+1.57%	6	20,527	0.3%	21.4	0.7%	63.1x	1.5x	DUTCHBANGL	37,605	1.2%	1.5	8.7x	0.7x
Jute	10,659	10,255	+403.45	+3.93%	3	2,346	0.0%	21.2	0.7%	NM	NM	EBL	36,385	1.1%	18.9	5.4x	0.7x
Ceramics	368	365	+3.49	+0.96%	5	16,519	0.3%	81.3	2.8%	NM	1.1x	PUBALIBANK	32,666	1.0%	1.9	4.2x	0.6x
Miscellaneous	4,146	4,145	+0.19	+0.00%	15	225,123	3.5%	155.8	5.4%	88.6x	1.8x	OLYMPIC	30,231	0.9%	1.5	16.3x	2.5x
Corporate Bond**	15,660	15,655	+5.94	+0.04%	16	34,299	0.5%	1.4	0.0%	NM	NM	CITYBANK	29,816	0.9%	26.3	3.0x	0.6x
Treasury Bond**	2,000	2,003	-2.66	-0.13%	234	3,204,041	49.5%	1.0	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
CENTRALINS	33.0	+10.0%	35.9	19.0x	0.7x	SQURPHARMA	108,958	7.7%	7.7x	1.4x	BEACHHATCH	46.0	+2.7%	134.8	9.8x	2.8x
ZAHEENSPIN	6.9	+9.5%	18.5	NM	2.6x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	LOVELLO	102.0	+6.5%	131.6	46.0x	8.1x
APEXFOODS	194.2	+7.7%	4.6	44.0x	1.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SQURPHARMA	205.3	+1.1%	116.8	7.7x	1.4x
KARNAPHULI	26.0	+7.4%	28.0	12.2x	1.1x	BATBC	50,233	3.6%	9.4x	2.9x	ASIATICLAB	37.9	+3.3%	99.0	15.7x	0.7x
SHYAMPSUG	124.8	+7.3%	0.0	NM	NM	WALTONHIL	46,773	3.3%	9.6x	1.1x	BRACBANK	49.7	+0.2%	94.5	7.3x	1.2x
REPUBLIC	26.9	+7.17%	3.0	14.1x	1.4x	BRACBANK	46,489	3.3%	7.3x	1.2x	KBPPWBIL	116.7	+3.0%	89.2	NM	9.8x
LOVELLO	102.0	+6.5%	131.6	46.0x	8x	GP	44,708	3.2%	13.4x	5.5x	AGNISYSL	28.2	+1.4%	73.8	21.2x	1.6x
WATACHEM	109.0	+5.8%	2.0	NM	1.8x	RENATA	32,968	2.3%	19.8x	1.6x	SPCERAMICS	21.5	-0.5%	57.9	NM	0.7x
AMBEEPHA	858.4	+5.6%	5.9	NM	63.9x	BXPBARMA	23,409	1.7%	6.0x	0.8x	ORIONINFU	318.7	-1.1%	51.7	NM	20.3x
MERCINS	23.2	+5.0%	0.7	12.1x	1.2x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	BATBC	286.9	+3.4%	50.5	9.4x	2.9x
						CITYBANK	21,020	1.5%	3.0x	0.6x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	14.6x	2.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FIRSTFIN	3.5	-5.4%	0.0	NM	NM	OLYMPIC	20,496	1.5%	16.3x	2.5x	LOVELLO	98.0	86.3	44.0	2,363	219.45
METROSPIN	9.9	-4.8%	1.3	NM	2x	ALARABANK	18,282	1.3%	36.2x	0.8x	NCCBANK	8.9	8.9	1.0	6,079	54.10
PLFSL	2.0	-4.8%	0.6	NM	NM	BEACONPHAR	17,838	1.3%	28.0x	3.7x	MARICO	2,350.0	2,350.0	2.0	20	46.62
FAREASTFIN	4.2	-4.5%	1.0	NM	NM	PRIMEBANK	16,142	1.1%	3.1x	0.6x	BRACBANK	50.2	50.2	1.0	200	10.04
SKTRIMS	9.0	-4.3%	1.5	NM	0.6x	ROBI	14,876	1.1%	17.6x	1.8x	EIL	53.8	51.9	8.0	156	8.31
ISLAMICFIN	7.5	-3.8%	2.1	NM	1.7x	UTTARABANK	13,699	1.0%	NM	0.6x	CENTRALINS	28.3	27.1	3.0	272	7.64
PREMIERLEA	3.0	-3.2%	0.1	NM	NM	NBL	13,055	0.9%	NM	8.0x	EASTRNLU	2,470.0	2,470.0	2.0	3	7.52
EMERALDOIL	21.6	-3.1%	4.1	18.4x	NM	BSRMLTD	12,852	0.9%	4.2x	0.5x	MIDLANDBNK	23.5	23.1	3.0	231	5.42
REGENTTEX	3.1	-3.1%	0.1	NM	0.1x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
GIB	3.1	-3.1%	0.6	5.9x	NM	** 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
LOVELLO	98.0	86.3	219.4	2,363	44
NCCBANK	8.9	8.9	54.1	6,079	1
MARICO	2,350.0	2,350.0	46.6	20	2
BRACBANK	50.2	50.2	10.0	200	1
EIL	53.8	51.9	8.3	156	8
CENTRALINS	28.3	27.1	7.6	272	3
EASTRNLU	2,470.0	2,470.0	7.5	3	2
MIDLANDBNK	23.5	23.1	5.4	231	3
AL-HAJTEX	117.7	117.6	3.1	26	2
RAHIMTEXT	104.0	104.0	2.8	27	1
BATBC	295.0	295.0	2.3	8	1
UTTARABANK	22.3	22.3	2.1	93	1
ORIONINFU	349.9	337.0	1.8	5	2
LHB	47.1	47.1	1.7	37	1
PREMIERC	47.6	47.6	1.4	30	2
ICB	48.1	48.1	1.2	24	1
AMANFEED	24.4	24.4	1.0	42	1
BEACONPHAR	100.0	100.0	1.0	10	1
NPOLYMER	29.5	29.5	0.9	32	1
BPPL	17.0	17.0	0.9	50	1
SIBL	7.8	7.8	0.8	98	1
WATACHEM	102.3	102.3	0.8	7	1
Total			383.7		86

Important DSE News

DHAKABANK

Referring to their earlier news disseminated by DSE on 29.05.2025 regarding Dividend Declaration, the company has further informed that Bangladesh Securities and Exchange Commission (BSEC) through their letter dated June 16, 2025 has notified the company to seek approval from them for issuance of 5% Bonus Shares as recommended by the Board of Directors of the Bank for the year 2024 as per Commission's Notification No. BSEC/CMRCD/2009-193/46/Admin/138 dated October 03, 2022. As such, issuance of 5% Bonus Shares to the shareholders shall be subject to approval of BSEC.

STANCERAM

(Q3 Un-audited): EPS was Tk. (2.32) for January-March 2025 as against Tk. (3.26) for January-March 2024; EPS was Tk. (12.28) for July 2024-March 2025 as against Tk. (15.31) for July 2023-March 2024. NOCFPS was Tk. (2.90) for July 2024-March 2025 as against Tk. (12.71) for July 2023-March 2024. NAV per share was Tk. (50.12) as on March 31, 2025 and Tk. (37.84) as on June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
STANDBANKL		0.0%	0.0%	Record Date	29-Jun-25

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