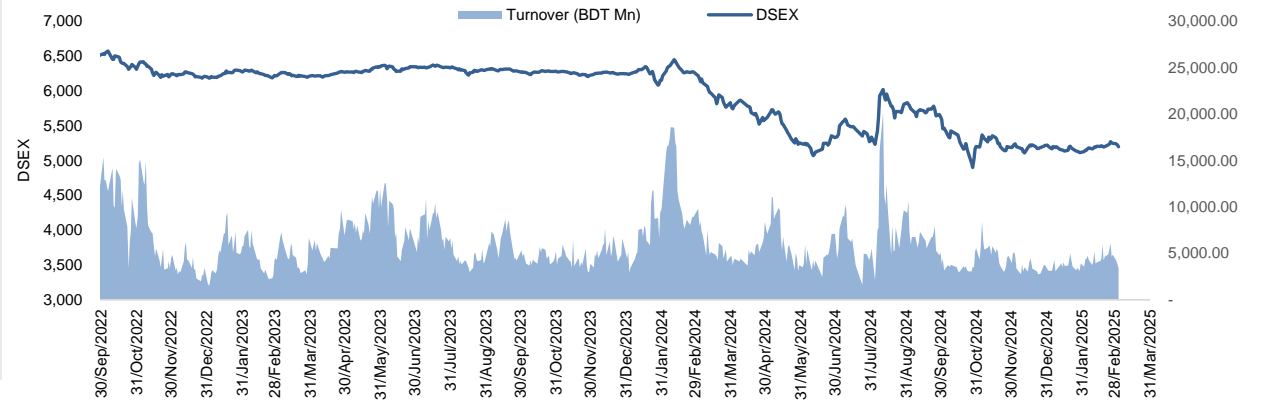


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.51%) lost 26.56 points and closed at 5,194.11. The blue-chip index DS30 (-0.47%), the Shariah-based index DSES (-0.35%), and the large-cap index CDSET (-0.34%) closed at 1,889.58, 1,158.35, and 1,044.31 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.72% followed by NBF1 (-0.69%), Fuel & Power (-0.68%), Engineering (-0.68%), Pharmaceutical (-0.56%), Telecommunication (-0.36%), and Bank (-0.34%), respectively. Block trades contributed 2.4% of the overall market turnover. Orion Infusion Ltd. (-2.1%) was the most traded share with a turnover of BDT 147 million.



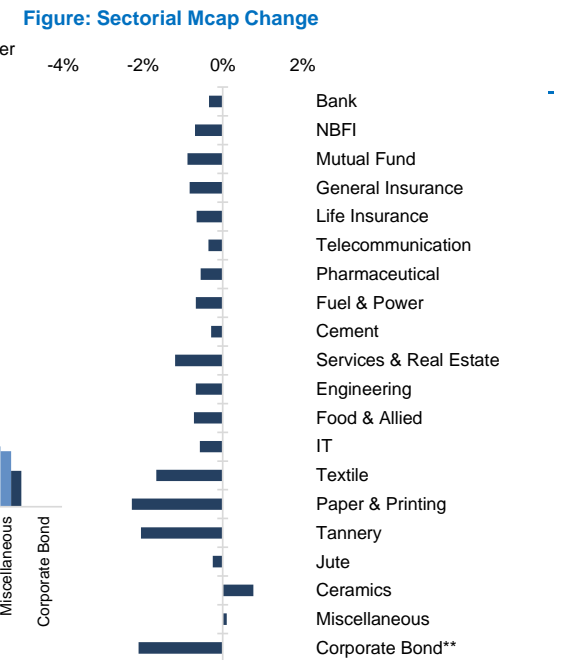
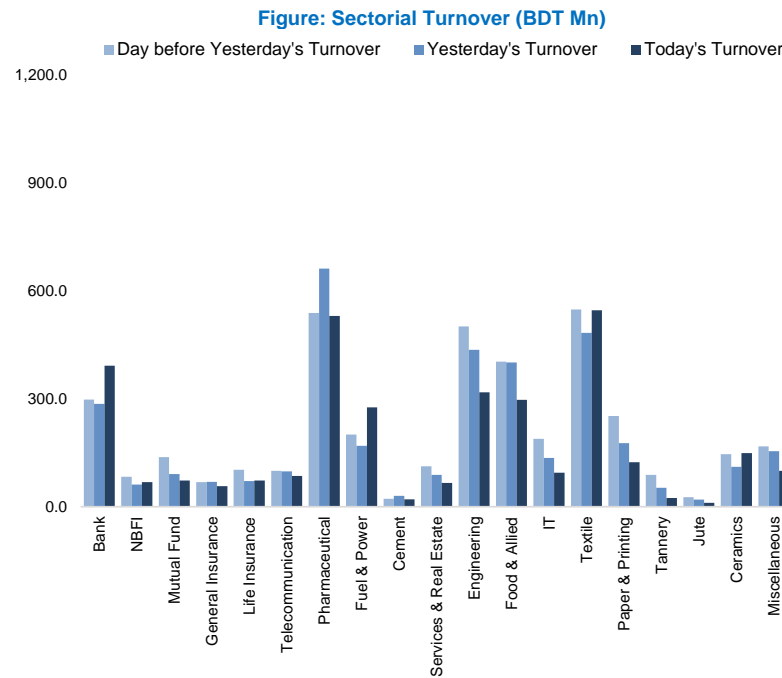
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,194.11	5,220.67	-26.56	-0.51%	-0.4%
DS30	1,889.58	1,898.52	-8.94	-0.47%	-2.6%
DSES	1,158.35	1,162.42	-4.07	-0.35%	-0.9%
CDSET	1,044.31	1,047.91	-3.60	-0.34%	-2.0%

	Advanced	Declined	Unchanged	Total
All Category	65	267	64	396
A Category (Equity)	31	145	41	217
B Category (Equity)	15	59	7	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	19	63	16	98
Mutual Funds	2	15	20	37
Corporate Bonds	0	1	0	1
Treasury Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,866,456	6,883,600	-0.2%
	Mn USD	56,282	56,423	
Turnover	Mn BDT	3,386	3,817	-11.3%
	Mn USD	28	31	
Volume	Mn Shares	135	141	-4.1%
No. of Trade		119,714	129,594	-7.6%

\* Average Interbank Exchange Rate is BDT 122.00 as of Mar 04, 2025

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Market PE 14.8x  
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	1,435	1,440	-4.94	-0.34%	36	679,181	9.9%	391.9	11.9%	8.8x	0.7x	GP	439,388	12.4%	35.5	12.1x	6.8x
NBFI	1,088	1,095	-7.58	-0.69%	23	103,650	1.5%	68.3	2.1%	NM	NM	SQURPHARMA	192,271	5.4%	43.0	8.6x	1.5x
Mutual Fund	573	578	-5.09	-0.88%	37	26,345	0.4%	72.6	2.2%	NM	0.5x	BATBC	176,580	5.0%	30.3	10.1x	3.1x
General Insurance	2,569	2,591	-21.52	-0.83%	43	73,341	1.1%	57.2	1.7%	13.0x	1.1x	ROBI	150,329	4.2%	46.2	21.4x	2.2x
Life Insurance	1,740	1,751	-11.49	-0.66%	15	46,273	0.7%	73.0	2.2%	NM	NM	WALTONHIL	142,104	4.0%	4.2	10.8x	1.3x
Telecommunication	5,233	5,251	-18.87	-0.36%	3	613,564	8.9%	85.2	2.6%	13.7x	4.1x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,872	2,888	-16.04	-0.56%	34	544,513	7.9%	530.0	16.0%	13.2x	1.5x	BRACBANK	92,025	2.6%	85.1	8.3x	1.2x
Fuel & Power	1,096	1,103	-7.46	-0.68%	23	290,298	4.2%	276.1	8.4%	15.9x	0.6x	BERGERPBL	83,452	2.3%	1.0	24.3x	5.8x
Cement	1,844	1,849	-5.37	-0.29%	7	87,864	1.3%	20.5	0.6%	16.9x	1.9x	MARICO	74,394	2.1%	7.5	13.3x	9.8x
Services & Real Estate	1,029	1,041	-12.39	-1.19%	9	56,585	0.8%	66.3	2.0%	20.1x	0.4x	ISLAMIBANK	71,645	2.0%	9.5	15.3x	1.0x
Engineering	2,489	2,506	-16.92	-0.68%	42	280,788	4.1%	318.0	9.6%	12.7x	0.9x	LHB	57,836	1.6%	7.8	14.3x	2.9x
Food & Allied	15,862	15,976	-114.63	-0.72%	21	290,227	4.2%	297.1	9.0%	15.8x	4.3x	RENATA	57,383	1.6%	23.0	19.4x	1.7x
IT	2,019	2,030	-11.58	-0.57%	11	26,628	0.4%	94.4	2.9%	20.7x	1.7x	UNILEVERCL	48,467	1.4%	4.1	65.9x	20.6x
Textile	1,166	1,186	-19.71	-1.66%	58	121,463	1.8%	545.4	16.5%	82.5x	0.8x	DUTCHBANGL	45,435	1.3%	3.0	7.3x	0.9x
Paper & Printing	4,665	4,774	-108.68	-2.28%	6	21,076	0.3%	123.9	3.7%	NM	1.0x	ICB	45,271	1.3%	4.6	35.7x	1.0x
Tannery	1,955	1,996	-40.82	-2.05%	6	21,786	0.3%	23.9	0.7%	NM	1.6x	EBL	35,176	1.0%	3.4	5.4x	0.8x
Jute	12,628	12,659	-31.67	-0.25%	3	2,780	0.0%	10.7	0.3%	NM	NM	BXPHARMA	34,931	1.0%	5.1	5.5x	0.7x
Ceramics	406	403	+3.11	+0.77%	5	18,223	0.3%	148.7	4.5%	NM	1.1x	PUBALIBANK	33,895	1.0%	1.8	3.5x	0.6x
Miscellaneous	4,255	4,250	+4.22	+0.10%	15	231,039	3.4%	99.3	3.0%	94.5x	1.9x	POWERGRID	31,252	0.9%	2.8	NM	0.2x
Corporate Bond**	14,981	15,304	-323.02	-2.11%	16	32,811	0.5%	1.3	0.0%	NM	NM	CITYBANK	30,695	0.9%	16.7	4.3x	0.8x
Treasury Bond**	1,522	1,485	+37.09	+2.50%	235	3,297,549	48.0%	1.4	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NTC	192.9	+10.0%	8.1	NM	NM
IBP	11.5	+9.5%	55.5	NM	0.8x
FIRSTFIN	3.6	+9.1%	0.2	NM	NM
PROGRESLIF	42.4	+8.2%	3.6	NM	NM
ARAMITCEM	16.1	+7.3%	5.7	NM	NM
LINDEBD	1,045.7	+7.32%	139.7	2.6x	4.7x
ATCSLGF	7.1	+4.4%	18.5	NM	1x
AOL	17.3	+4.2%	14.0	33.3x	0.9x
JUTESPINN	231.9	+4.2%	0.1	NM	NM
SPCERAMICS	18.4	+4.0%	94.5	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	15.3x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.1x	3.1x
WALTONHIL	46,773	3.3%	10.8x	1.3x
BRACBANK	46,489	3.3%	8.3x	1.2x
GP	44,708	3.2%	12.1x	6.8x
RENATA	32,968	2.3%	19.4x	1.7x
BXPHARMA	23,409	1.7%	5.5x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.3x	0.8x
LHB	20,953	1.5%	14.3x	2.9x
OLYMPIC	20,496	1.5%	15.9x	2.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	382.6	-2.1%	147.4	NM	25.0x
LINDEBD	1,045.7	+7.3%	139.7	2.6x	4.7x
SPCERAMICS	18.4	+4.0%	94.5	NM	0.6x
AIL	76.2	-1.6%	90.0	28.6x	3.3x
BRACBANK	52.0	-1.1%	85.1	8.3x	1.2x
KDSALTD	43.8	+3.5%	71.7	20.0x	1.6x
IBP	11.5	+9.5%	55.5	NM	0.8x
SONARGAON	47.4	-8.0%	52.3	NM	2.5x
IFIC	7.0	-2.8%	50.4	5.6x	0.4x
LOVELLO	80.9	-1.5%	48.1	36.5x	6.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONARGAON	47.4	-8.0%	52.3	NM	2.5x
SALAMCRST	21.1	-7.0%	24.5	NM	1x
RELIANCINS	54.2	-5.7%	3.3	5.9x	0.8x
SHARPIND	21.5	-5.7%	10.7	33.1x	2.1x
FASFIN	3.4	-5.6%	0.6	NM	NM
NEWLINE	10.3	-5.5%	18.1	NM	0.4x
RELIANCE1	21.4	-5.3%	17.4	NM	2.0x
DBH1STMF	3.7	-5.1%	1.0	NM	0.4x
ACTIVEFINE	9.5	-5.0%	7.7	NM	0.4x
PHOENIXFIN	4.0	-4.8%	0.5	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
ALARABANK	18,282	1.3%	14.0x	1.0x
BEACONPHAR	17,838	1.3%	50.9x	4.5x
PRIMEBANK	16,142	1.1%	4.4x	0.7x
ROBI	14,876	1.1%	21.4x	2.2x
UTTARABANK	13,699	1.0%	8.6x	0.8x
NBL	13,055	0.9%	NM	2.4x
BSRMLTD	12,852	0.9%	5.2x	0.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACI	165.0	164.0	5.0	151	24.78
SQURPHARMA	217.5	217.5	1.0	50	10.88
SUNLIFEINS	74.1	69.0	7.0	154	10.84
JAMUNABANK	20.4	20.4	1.0	370	7.55
SHEPHERD	20.0	17.3	2.0	358	6.30
AL-HAJTEX	152.0	148.0	4.0	39	5.90
ISLAMIBANK	46.9	46.9	1.0	50	2.35
ACMEPL	15.5	15.5	2.0	140	2.17
KDSALTD	42.3	42.3	1.0	33	1.40
DHAKAINS	38.0	38.0	1.0	31	1.18

\* 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
ACI	165.0	164.0	24.8	151	5
SQURPHARMA	217.5	217.5	10.9	50	1
SUNLIFEINS	74.1	69.0	10.8	154	7
JAMUNABANK	20.4	20.4	7.5	370	1
SHEPHERD	20.0	17.3	6.3	358	2
AL-HAJTEX	152.0	148.0	5.9	39	4
ISLAMIBANK	46.9	46.9	2.3	50	1
ACMEPL	15.5	15.5	2.2	140	2
KDSALTD	42.3	42.3	1.4	33	1
DHAKAINS	38.0	38.0	1.2	31	1
MERCANBANK	10.0	10.0	1.1	107	1
CVOPRL	137.2	137.2	0.9	6	1
DSSL	12.1	12.1	0.8	69	1
RELIANCE1	21.2	21.2	0.8	37	1
HRTEX	44.6	44.6	0.7	17	1
INTRACO	20.0	20.0	0.7	37	1
DELTALIFE	70.0	70.0	0.6	8	1
NAVANAPHAR	52.9	52.9	0.5	10	1
DOMINAGE	13.0	13.0	0.5	40	1
NITOLINS	26.0	26.0	0.5	20	1
<b>Total</b>			<b>80.5</b>		<b>35</b>

**Important DSE News**

**SQURPHARMA**

Mr. Tapan Chowdhury, Managing Director of the Company, has expressed his intention to buy 1,500,000 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SUMITPOWER		0.0%	10.0%	Record Date	10-Mar-25
ROBI		0.0%	15.0%	Record Date	16-Mar-25

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