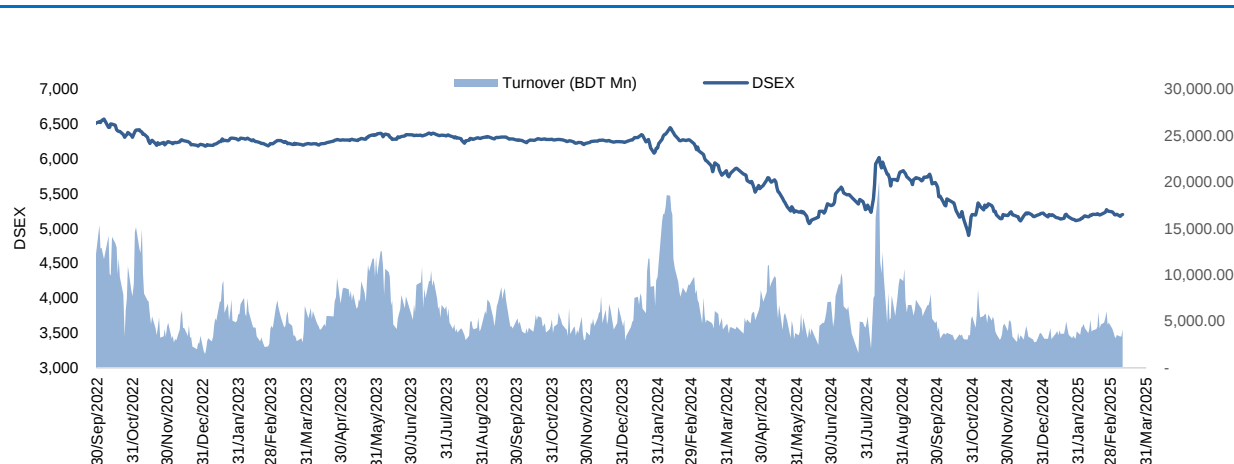


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.16%) gained 8.36 points and closed at 5,199.30. The blue-chip index DS30 (+0.23%), the Shariah-based index DSES (+0.15%), and the large-cap index CDSET (-0.21%) closed at 1,894.68, 1,163.92, and 1,043.86 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.42%, followed by Food & Allied (+0.36%), Pharmaceutical (+0.13%), Bank (-0.16%), NBFI (-0.29%), Telecommunication (-0.67%), and Fuel & Power (-1.12%), respectively. Block trades contributed 5.3% of the overall market turnover. Orion Infusion Ltd. (+1.4%) was the most traded share with a turnover of BDT 259 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,199.30	5,190.95	+8.36	+0.16%	-0.3%
DS30	1,894.68	1,890.28	+4.39	+0.23%	-2.3%
DSES	1,163.92	1,162.13	+1.79	+0.15%	-0.4%
CDSET	1,043.86	1,046.09	-2.23	-0.21%	-2.1%

	Advanced	Declined	Unchanged	Total
All Category	182	138	77	397
A Category (Equity)	115	61	42	218
B Category (Equity)	36	35	11	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	31	42	24	97
Mutual Funds	12	7	17	36
Corporate Bonds	2	0	0	2
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,762,900	6,804,760	-0.6%
	Mn USD	55,434	55,777	
Turnover	Mn BDT	4,125	3,381	+22.0%
	Mn USD	34	28	
Volume	Mn Shares	123	105	+17.9%
No. of Trade		125,703	114,412	+9.9%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 11, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
---	---

Figure: Sectorial Turnover (BDT Mn)

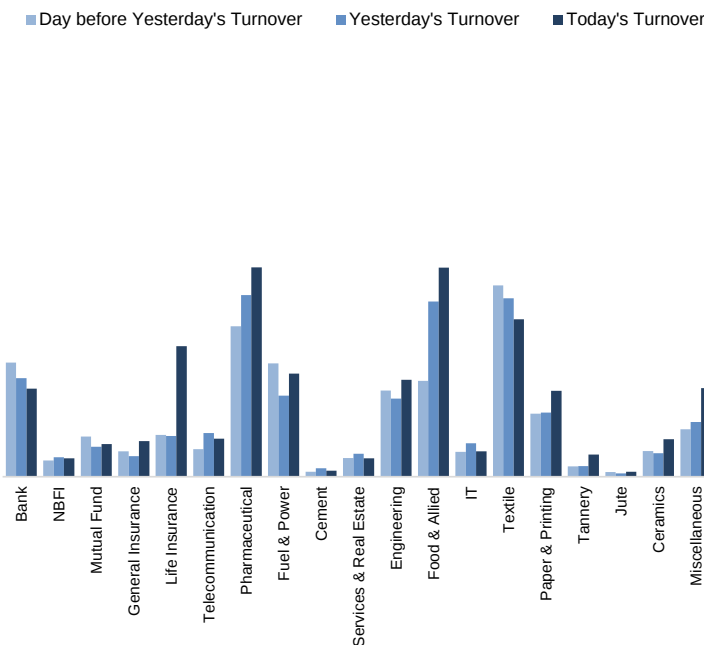
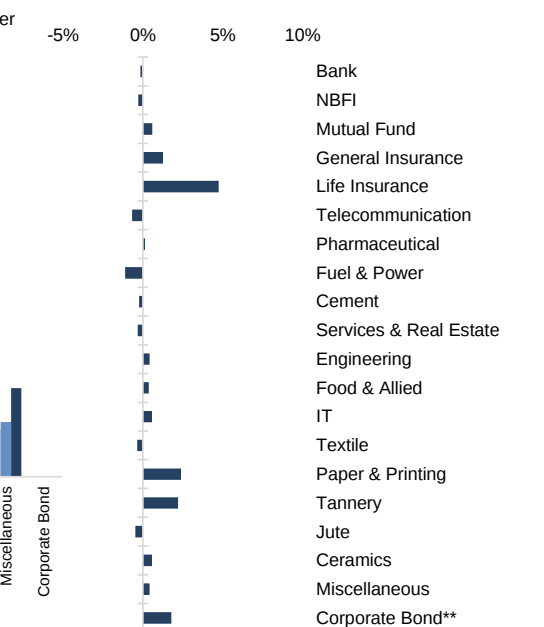


Figure: Sectorial Mcap Change



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	1,432	1,434	-2.25	-0.16%	36	677,518	10.1%	244.2	6.2%	8.7x	0.7x	GP	438,712	12.4%	21.5	12.1x	6.8x
NBFI	1,073	1,076	-3.17	-0.29%	23	102,238	1.5%	50.9	1.3%	NM	NM	SQURPHARMA	192,980	5.4%	97.8	8.6x	1.5x
Mutual Fund	573	570	+3.35	+0.59%	37	26,331	0.4%	91.0	2.3%	NM	0.5x	BATBC	175,446	4.9%	16.8	10.0x	3.0x
General Insurance	2,538	2,507	+31.73	+1.27%	43	72,465	1.1%	98.7	2.5%	12.9x	1.1x	ROBI	148,234	4.2%	81.6	21.1x	2.2x
Life Insurance	1,828	1,745	+82.82	+4.75%	15	48,610	0.7%	362.1	9.3%	NM	NM	WALTONHIL	142,588	4.0%	5.0	10.8x	1.3x
Telecommunication	5,207	5,242	-35.28	-0.67%	3	610,569	9.1%	105.3	2.7%	13.7x	4.1x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,882	2,878	+3.73	+0.13%	34	546,395	8.1%	581.0	14.9%	13.2x	1.5x	BRACBANK	91,848	2.6%	39.4	8.3x	1.2x
Fuel & Power	1,097	1,109	-12.39	-1.12%	23	290,586	4.3%	286.1	7.3%	15.9x	0.6x	BERGERPBL	83,480	2.4%	4.0	24.3x	5.8x
Cement	1,822	1,827	-4.39	-0.24%	7	86,847	1.3%	16.5	0.4%	16.7x	1.9x	MARICO	75,093	2.1%	4.0	13.4x	9.9x
Services & Real Estate	1,016	1,019	-3.32	-0.33%	9	55,885	0.8%	50.9	1.3%	19.8x	0.4x	ISLAMIBANK	70,035	2.0%	11.9	15.0x	1.0x
Engineering	2,473	2,463	+10.25	+0.42%	42	279,000	4.2%	269.2	6.9%	12.7x	0.9x	RENATA	57,819	1.6%	11.1	19.5x	1.7x
Food & Allied	15,830	15,773	+57.46	+0.36%	21	289,648	4.3%	580.2	14.8%	15.8x	4.3x	LHB	56,907	1.6%	9.3	14.1x	2.8x
IT	2,002	1,991	+11.49	+0.58%	11	26,409	0.4%	70.8	1.8%	20.5x	1.7x	UNILEVERCL	48,182	1.4%	1.0	72.2x	19.7x
Textile	1,142	1,146	-4.05	-0.35%	58	118,925	1.8%	437.3	11.2%	80.8x	0.8x	DUTCHBANGL	44,732	1.3%	5.6	7.2x	0.9x
Paper & Printing	4,748	4,637	+111.08	+2.40%	6	21,451	0.3%	238.4	6.1%	NM	1.0x	ICB	44,490	1.3%	7.1	35.1x	1.0x
Tannery	1,999	1,956	+43.14	+2.21%	6	22,273	0.3%	61.4	1.6%	NM	1.6x	BXPHARMA	36,135	1.0%	11.2	5.6x	0.7x
Jute	12,347	12,406	-59.16	-0.48%	3	2,718	0.0%	13.9	0.4%	NM	NM	EBL	35,040	1.0%	4.4	5.4x	0.8x
Ceramics	399	397	+2.27	+0.57%	5	17,895	0.3%	104.2	2.7%	NM	1.1x	PUBALIBANK	33,895	1.0%	3.1	3.5x	0.6x
Miscellaneous	4,280	4,262	+17.62	+0.41%	15	232,403	3.5%	246.0	6.3%	95.1x	1.9x	POWERGRID	31,983	0.9%	3.6	NM	0.2x
Corporate Bond**	15,005	14,741	+263.89	+1.79%	16	32,864	0.5%	0.3	0.0%	NM	NM	CITYBANK	30,830	0.9%	17.8	4.3x	0.8x
Treasury Bond**	1,555	1,555	+0.20	+0.01%	234	3,156,228	47.0%	0.1	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
SALAMCRST	22.0	+10.0%	45.3	NM	1.2x	SQURPHARMA	108,958	7.7%	8.6x	1.5x	ORIONINFU	419.6	+1.4%	259.1	NM	27.4x
PRIMELIFE	43.0	+10.0%	9.7	NM	NM	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	BEACHHATCH	124.4	+1.9%	222.0	36.5x	8.2x
TILIL	44.8	+9.8%	24.6	18.5x	NM	BEXIMCO	69,463	4.9%	NM	1.3x	LOVELLO	86.3	+3.9%	176.7	38.9x	6.8x
SICL	22.5	+9.8%	3.0	NM	1.3x	BATBC	50,233	3.6%	10.0x	3.0x	KBPPWBIL	171.2	+3.8%	162.8	NM	14.4x
FAREASTLIF	32.6	+9.0%	6.8	NM	NM	WALTONHIL	46,773	3.3%	10.8x	1.3x	LINDEBD	1,119.4	+0.4%	112.5	2.8x	5.1x
VAMLRBBF	5.0	+8.70%	1.4	NM	0.5x	BRACBANK	46,489	3.3%	8.3x	1.2x	SQURPHARMA	217.7	+0.1%	97.8	8.6x	1.5x
TOSRIFA	23.9	+8.1%	31.1	45.1x	1x	GP	44,708	3.2%	12.1x	6.8x	HAKKANIPUL	70.4	+4.1%	93.5	NM	2.9x
DELTA LIFE	78.4	+7.5%	80.6	NM	NM	RENATA	32,968	2.3%	19.5x	1.7x	ROBI	28.3	-1.0%	81.6	21.1x	2.2x
RENWICKJA	639.0	+7.4%	0.0	NM	NM	BXPHARMA	23,409	1.7%	5.6x	0.7x	DELTA LIFE	78.4	+7.5%	80.6	NM	NM
KPPL	27.0	+5.9%	56.6	NM	NM	PUBALIBANK	22,905	1.6%	3.5x	0.6x	SPCERAMICS	17.6	+1.7%	71.3	NM	0.6x
						CITYBANK	21,020	1.5%	4.3x	0.8x						
						LHB	20,953	1.5%	14.1x	2.8x						
						OLYMPIC	20,496	1.5%	15.9x	2.5x						
						ALARABANK	18,282	1.3%	14.0x	1.0x						
						BEACONPHAR	17,838	1.3%	51.2x	4.5x						
						PRIMEBANK	16,142	1.1%	4.4x	0.7x						
						ROBI	14,876	1.1%	21.1x	2.2x						
						UTTARABANK	13,699	1.0%	8.6x	0.8x						
						NBL	13,055	0.9%	NM	2.4x						
						BSRMLTD	12,852	0.9%	5.0x	0.5x						

* 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
BEACHHATCH	125.8	109.9	78.2	677	20	
TILIL	43.3	42.5	24.9	584	9	
SINGERBD	105.0	105.0	21.0	200	2	
AIL	68.0	68.0	14.1	207	2	
LOVELLO	83.0	81.2	13.3	162	3	
BEACONPHAR	135.4	135.4	11.7	86	1	
KBPPWBIL	150.8	148.5	6.7	45	3	
SHEPHERD	17.5	17.5	5.3	300	1	
ORIONINFU	430.0	409.0	5.0	12	4	
TOSRIFA	24.0	21.0	5.0	220	2	
SONALILIFE	45.4	44.8	4.9	108	5	
DBH	37.8	33.0	4.3	115	2	
JAMUNABANK	21.0	21.0	4.2	200	1	
GP	336.8	336.8	3.7	11	1	
FINEFOODS	205.0	190.0	2.0	10	2	
SONARGAON	48.4	47.7	1.8	38	2	
SPCERAMICS	19.0	19.0	1.8	93	1	
SINOBANGLA	47.8	47.8	1.5	32	3	
SHYAMPSUG	102.0	101.0	1.0	10	2	
GPHISPAT	22.0	22.0	0.8	38	1	
MONNOCERA	86.5	86.5	0.8	9	1	
EIL	52.9	52.9	0.7	14	1	
Total			216.8		76	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ROBI		0.0%	15.0%	Record Date	16-Mar-25
UNILEVERCL		0.0%	520.0%	Record Date	6-Apr-25
PIONEERINS		0.0%	25.0%	Record Date	7-Apr-25

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.