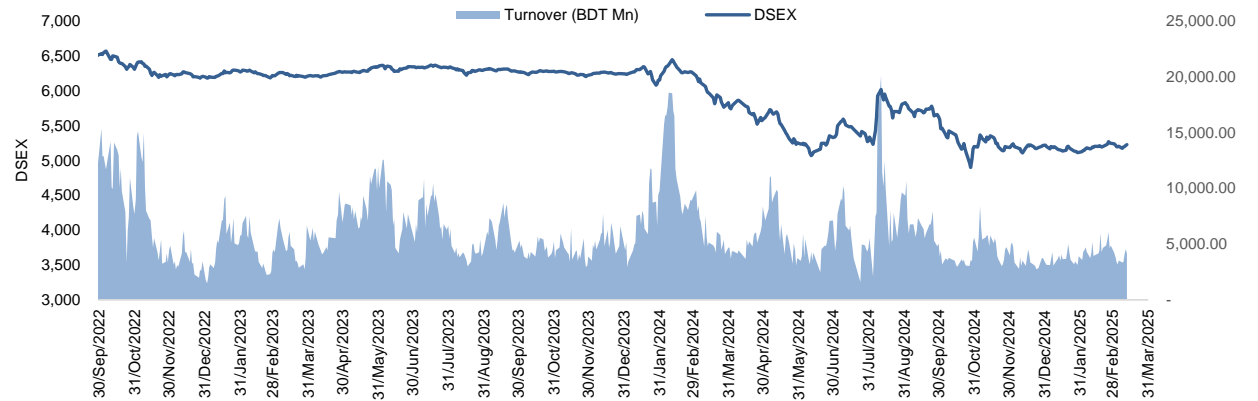


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.18%) gained 9.55 points and closed at 5,225.61. The blue-chip index DS30 (+0.10%), the Shariah-based index DSES (-0.11%), and the large-cap index CDSET (+0.18%) closed at 1,901.56, 1,165.28, and 1,048.72 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.56%, followed by Pharmaceutical (+0.27%), Telecommunication (+0.06%), Food & Allied (-0.07%), Engineering (-0.17%), NBF1 (-0.29%), and Fuel & Power (-1.11%), respectively. Block trades contributed 4.7% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-1.7%) was the most traded share with a turnover of BDT 202 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,225.61	5,216.07	+9.55	+0.18%	+0.2%
DS30	1,901.56	1,899.62	+1.93	+0.10%	-2.0%
DSES	1,165.28	1,166.61	-1.33	-0.11%	-0.3%
CDSET	1,048.72	1,046.85	+1.87	+0.18%	-1.6%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	163	154	77	394
<b>A Category (Equity)</b>	103	81	33	217
<b>B Category (Equity)</b>	30	40	11	81
<b>N Category (Equity)</b>	0	0	0	0
<b>Z Category (Equity)</b>	30	33	33	96
<b>Mutual Funds</b>	13	6	17	36
<b>Corporate Bonds</b>	0	2	0	2
<b>Treasury Bonds</b>	0	0	0	0

	Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT 6,755,706	6,765,336	-0.1%
	Mn USD 55,375	55,454	
<b>Turnover</b>	Mn BDT 4,146	4,528	-8.5%
	Mn USD 34	37	
<b>Volume</b>	Mn Shares 147	159	-7.9%
<b>No. of Trade</b>	137,319	135,692	+1.2%

\* Average Interbank Exchange Rate is BDT 122.00 as of Mar 13, 2025

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Figure: Sectorial Turnover (BDT Mn)

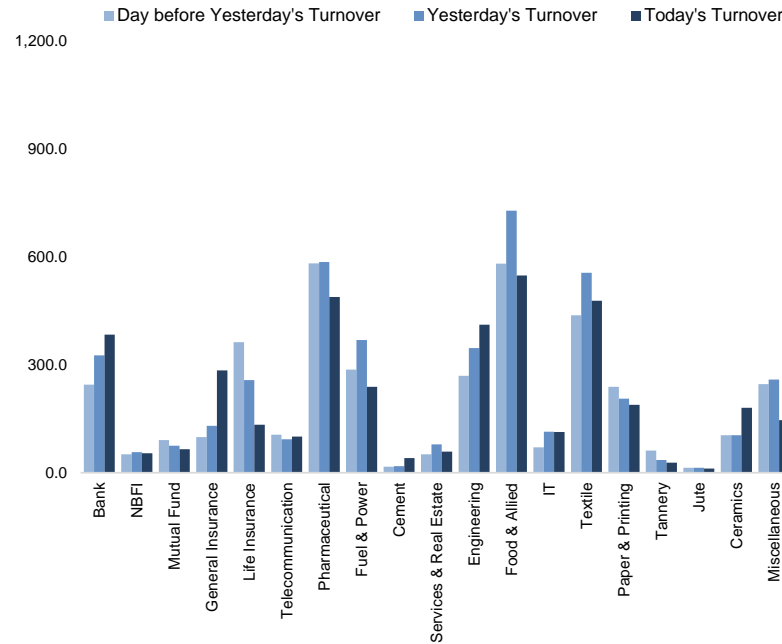
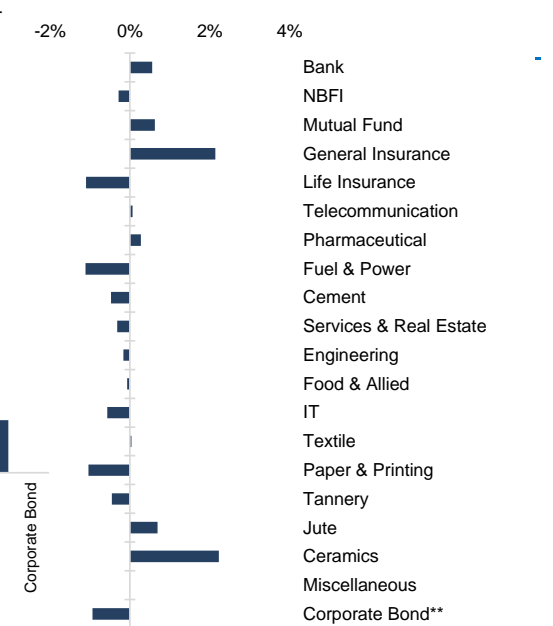


Figure: Sectorial Mcap Change



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	1,446	1,438	+8.04	+0.56%	36	684,315	10.2%	383.6	9.7%	8.8x	0.7x	GP	439,388	12.4%	26.8	12.1x	6.8x
NBFI	1,071	1,074	-3.06	-0.29%	23	102,046	1.5%	54.1	1.4%	NM	NM	SQURPHARMA	194,931	5.5%	98.2	8.7x	1.5x
Mutual Fund	579	575	+3.59	+0.62%	37	26,611	0.4%	65.1	1.6%	NM	0.5x	BATBC	177,228	5.0%	15.6	10.1x	3.1x
General Insurance	2,606	2,551	+54.58	+2.14%	43	74,383	1.1%	284.2	7.2%	13.2x	1.1x	ROBI	147,186	4.1%	71.9	21.0x	2.1x
Life Insurance	1,783	1,803	-19.82	-1.10%	15	47,433	0.7%	133.3	3.4%	NM	NM	WALTONHIL	141,104	4.0%	4.3	10.7x	1.3x
Telecommunication	5,204	5,201	+3.32	+0.06%	3	610,215	9.1%	100.5	2.5%	13.7x	4.1x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,895	2,887	+7.93	+0.27%	34	548,773	8.2%	488.0	12.4%	13.3x	1.5x	BRACBANK	93,441	2.6%	39.6	8.4x	1.2x
Fuel & Power	1,083	1,095	-12.20	-1.11%	23	286,773	4.3%	238.7	6.0%	15.7x	0.6x	BERGERPBL	81,310	2.3%	1.1	23.7x	5.6x
Cement	1,813	1,822	-8.66	-0.48%	7	86,423	1.3%	40.3	1.0%	17.4x	1.9x	MARICO	74,652	2.1%	6.1	13.3x	9.8x
Services & Real Estate	1,017	1,020	-3.25	-0.32%	9	55,935	0.8%	58.6	1.5%	19.9x	0.4x	ISLAMIBANK	70,518	2.0%	12.5	15.1x	1.0x
Engineering	2,470	2,475	-4.08	-0.17%	42	278,689	4.2%	411.2	10.4%	12.6x	0.9x	RENATA	57,887	1.6%	3.5	19.6x	1.7x
Food & Allied	15,947	15,958	-11.04	-0.07%	21	291,789	4.3%	547.3	13.9%	15.9x	4.3x	LHB	56,210	1.6%	19.4	14.7x	3.0x
IT	1,986	1,998	-11.28	-0.56%	11	26,200	0.4%	112.8	2.9%	20.3x	1.7x	UNILEVERCL	48,261	1.4%	0.2	72.3x	19.7x
Textile	1,151	1,150	+0.44	+0.04%	58	119,841	1.8%	477.8	12.1%	81.4x	0.8x	DUTCHBANGL	44,820	1.3%	3.8	7.2x	0.9x
Paper & Printing	4,676	4,725	-48.93	-1.04%	6	21,124	0.3%	188.9	4.8%	NM	1.0x	ICB	44,230	1.2%	4.9	34.9x	1.0x
Tannery	1,987	1,996	-8.96	-0.45%	6	22,140	0.3%	27.8	0.7%	NM	1.6x	BXPHARMA	36,180	1.0%	52.5	5.7x	0.7x
Jute	12,393	12,308	+85.56	+0.70%	3	2,728	0.0%	11.6	0.3%	NM	NM	EBL	35,176	1.0%	2.1	5.4x	0.8x
Ceramics	409	400	+8.94	+2.23%	5	18,362	0.3%	180.4	4.6%	NM	1.1x	PUBALIBANK	34,011	1.0%	2.8	3.5x	0.6x
Miscellaneous	4,240	4,240	-0.08	-0.00%	15	230,253	3.4%	145.7	3.7%	94.2x	1.9x	POWERGRID	31,892	0.9%	3.8	NM	0.2x
Corporate Bond**	14,900	15,040	-140.85	-0.94%	16	32,633	0.5%	0.2	0.0%	NM	NM	CITYBANK	30,965	0.9%	26.1	4.3x	0.8x
Treasury Bond**	1,587	1,574	+13.07	+0.83%	234	3,143,462	46.8%	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
ZEALBANGLA	94.6	+10.0%	2.6	NM	NM	SQURPHARMA	108,958	7.7%	8.7x	1.5x	LOVELLO	86.2	-1.7%	202.4	38.8x	6.8x
SHYAMPUSUG	127.2	+9.9%	19.9	NM	NM	ISLAMIBANK	74,730	5.3%	15.1x	1.0x	ORIONINFU	416.6	-0.1%	136.4	NM	27.2x
SALAMCRST	26.6	+9.9%	62.6	NM	1.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	20.0	+9.9%	131.6	NM	0.7x
SPCERAMICS	20.0	+9.9%	131.6	NM	0.7x	BATBC	50,233	3.6%	10.1x	3.1x	BEACHHATCH	121.3	-1.3%	105.6	35.6x	8.0x
PARAMOUNT	40.5	+9.8%	28.2	16.4x	1.5x	WALTONHIL	46,773	3.3%	10.7x	1.3x	SQURPHARMA	219.9	+0.5%	98.2	8.7x	1.5x
DGIC	22.6	+8.13%	12.3	27.9x	1.8x	BRACBANK	46,489	3.3%	8.4x	1.2x	HAKKANIPUL	70.9	+1.9%	83.5	NM	2.9x
CONTININS	26.2	+7.8%	21.1	19.4x	1x	GP	44,708	3.2%	12.1x	6.8x	BDTHAI	15.7	+3.3%	74.6	NM	0.5x
PREMIERCEM	49.6	+6.9%	11.8	10.4x	0.8x	RENATA	32,968	2.3%	19.6x	1.7x	ROBI	28.1	+0.4%	71.9	21.0x	2.1x
DULAMIACOT	79.4	+6.9%	2.0	NM	NM	BXPHARMA	23,409	1.7%	5.7x	0.7x	AIL	65.6	-2.2%	70.8	24.6x	2.8x
RSRMSTEEL	12.6	+6.8%	7.6	NM	0.3x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	KBPPWBIL	171.8	-4.1%	70.0	NM	14.5x

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)
RELIANCE1	20.6	-5.1%	20.8	NM	1.9x	SINGERBD	105.0	105.0	4.0	345	36.25
KBPPWBIL	171.8	-4.1%	70.0	NM	14x	TRUSTBANK	22.7	22.5	16.0	1,526	34.40
ISLAMICFIN	11.1	-3.5%	3.2	NM	2.6x	LOVELLO	86.0	79.0	9.0	386	31.64
UTTARAFIN	14.5	-3.3%	0.6	NM	0.2x	BEACHHATCH	130.0	111.0	8.0	201	24.18
PHPMF1	3.0	-3.2%	0.1	NM	0.3x	FINEFOODS	187.0	187.0	2.0	105	19.64
MIRACLEIND	31.4	-3.1%	5.8	NM	1.7x	JAMUNABANK	20.5	20.5	1.0	920	18.86
LINDEBD	1,041.6	-3.0%	69.9	2.6x	4.7x	SQURPHARMA	220.3	220.3	1.0	60	13.22
ISNLTD	42.0	-3.0%	11.8	NM	14.8x	SHEPHERD	18.3	17.0	3.0	139	2.46
TOSRIFA	22.9	-3.0%	13.9	43.2x	0.7x	TILIL	47.0	43.0	2.0	56	2.44
PREMIERLEA	3.3	-2.9%	0.1	NM	NM	UCB	10.5	10.5	1.0	153	1.61

\* 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
SINGERBD	105.0	105.0	36.3	345	4
TRUSTBANK	22.7	22.5	34.4	1,526	16
LOVELLO	86.0	79.0	31.6	386	9
BEACHHATCH	130.0	111.0	24.2	201	8
FINEFOODS	187.0	187.0	19.6	105	2
JAMUNABANK	20.5	20.5	18.9	920	1
SQURPHARMA	220.3	220.3	13.2	60	1
SHEPHERD	18.3	17.0	2.5	139	3
TILIL	47.0	43.0	2.4	56	2
UCB	10.5	10.5	1.6	153	1
GP	298.0	298.0	1.5	5	1
PRIMELIFE	43.0	43.0	1.3	30	1
BDTHAIFOOD	18.2	18.2	1.1	60	1
HAMI	105.0	105.0	0.9	9	1
NRBBANK	13.6	13.6	0.9	66	1
RELIANCE1	21.7	21.7	0.7	33	1
PEOPLESINS	28.6	28.6	0.7	25	1
TECHNODRUG	36.4	36.4	0.6	15	1
MONOCERA	90.3	90.3	0.5	6	1
SONARGAON	47.5	47.5	0.5	11	1
IFILISLMF1	4.3	4.3	0.5	120	1
SINOBANGLA	47.2	47.2	0.5	11	1
<b>Total</b>			<b>195.5</b>		<b>61</b>

**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
LHB		0.0%	19.0%	Record Date	9-Apr-25

**Important DSE News**
**LHB**

The Board of Directors has recommended 19% final cash dividend (in addition to the 19% interim cash dividend which has already been paid) for the year ended December 31, 2024. Date of AGM: 08-May-2025, Time: 03:00 PM, Venue: Digital Platform. Record Date: 09-April-2025. The company has also reported Consolidated EPS of Tk. 3.29, Consolidated NAV per share of Tk. 16.01 and Consolidated NOCFPS of Tk. 6.82 for the year ended December 31, 2024 as against Tk. 5.12, Tk. 19.14 and Tk. 6.82 respectively for the same period of the previous year.

**BSCPLC**

**Q1 Financials (Revised):** Refer to their earlier news disseminated by DSE on 10.11.2024 regarding Q1 Financials, the company has further informed that they mistook to calculate the information for the Q1, 2024. The revised Q1 financials' information are as follows: Basic EPS was Tk. 2.54 for July-September 2024 as against Tk. 3.42 (restated) for July-September 2023. Diluted EPS was Tk. 2.33 for July-September 2024 as against Tk. 3.22 for July-September 2023; NOCFPS was Tk. 1.71 for July-September 2024 as against Tk. 5.23 for July-September 2023. NAV per share was Tk. 85.02 as on September 30, 2024 and Tk. 93.06 as on June 30, 2024.

**Q2 Financials (Revised):** Refer to their earlier news disseminated by DSE on 26.01.2025 regarding Q2 Financials, the company has further informed that they mistook to calculate the information for the Q2, 2024. The revised Q2 financials' information are as follows: Basic EPS was Tk. 2.32 for October-December 2024 as against Tk. 3.15 (restated) for October-December 2023; Basic EPS was Tk. 4.93 for July-December 2024 as against Tk. 6.83 (restated) for July-December 2023. Diluted EPS was Tk. 2.12 for October-December 2024 as against Tk. 2.91 for October-December 2023; Diluted EPS was Tk. 4.52 for July-December 2024 as against Tk. 6.30 for July-December 2023. NOCFPS was Tk. 4.73 for July-December 2024 as against Tk. 10.09 for July-December 2023. NAV per share was Tk. 83.41 as on December 31, 2024 and Tk. 93.06 as on June 30, 2024.

**MONOSPOOL**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Monospool Bangladesh PLC' instead of 'Bangladesh Monospool Paper Manufacturing Co. Limited' with effect from March 16, 2025. Other information (except the name) will remain unchanged.

**PAPERPROC**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Magura Multiplex PLC.' instead of 'Paper Processing & Packaging Limited' and DSE Trading Code for Magura Multiplex PLC. will be "MAGURAPLEX" instead of "PAPERPROC" with effect from March 16, 2025. Other information (except the name and trading code) will remain unchanged.

**UNITEDINS**

The company has informed that the Board of Directors has elected Mr. Khandaker Moinul Ahsan as the Chairman of the company.

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