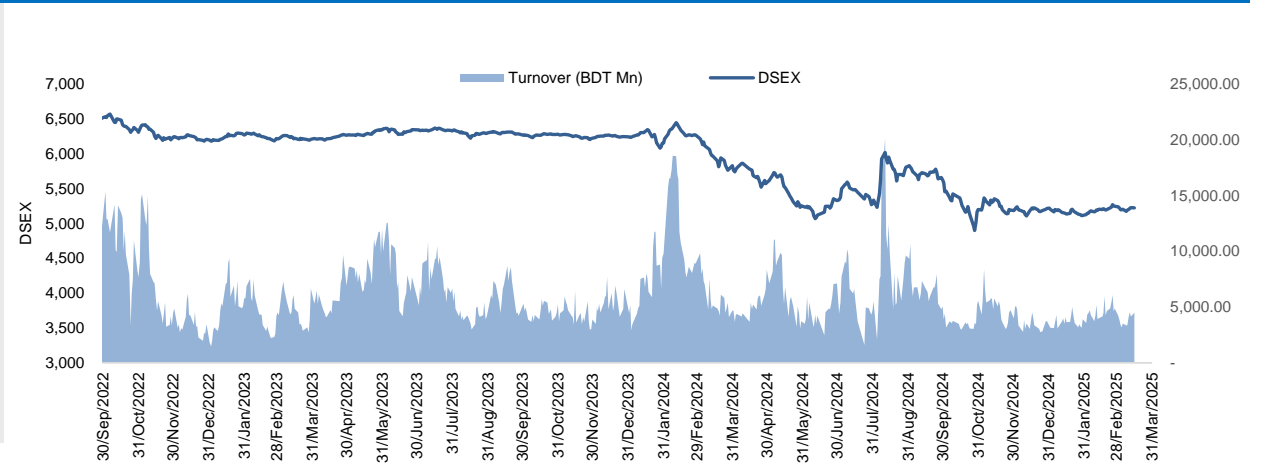


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.07%) lost 3.67 points and closed at 5,221.95. The blue-chip index DS30 (-0.37%), the Shariah-based index DSES (-0.17%), and the large-cap index CDSET (-0.18%) closed at 1,894.60, 1,163.31, and 1,046.82 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.73% followed by Bank (-0.59%), Food & Allied (-0.53%), Fuel & Power (-0.33%), Telecommunication (-0.19%), Pharmaceutical (+0.05%), and Engineering (+0.58%), respectively. Block trades contributed 3.5% of the overall market turnover. Square Pharmaceuticals Ltd. (+0.2%) was the most traded share with a turnover of BDT 140 million.



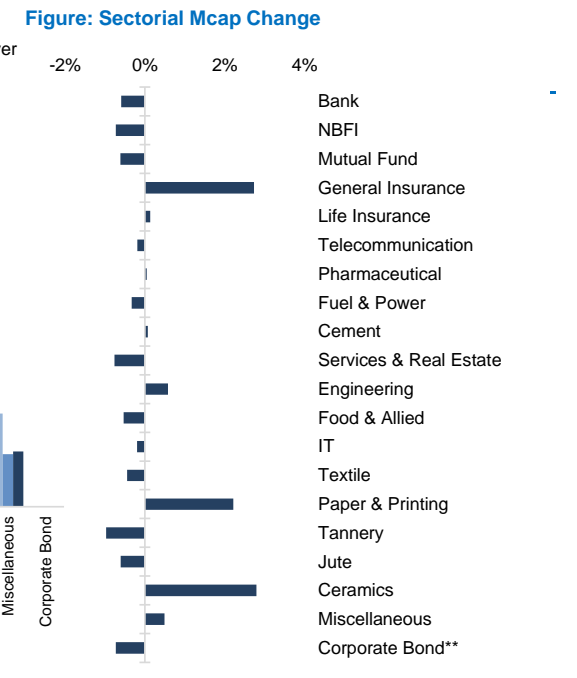
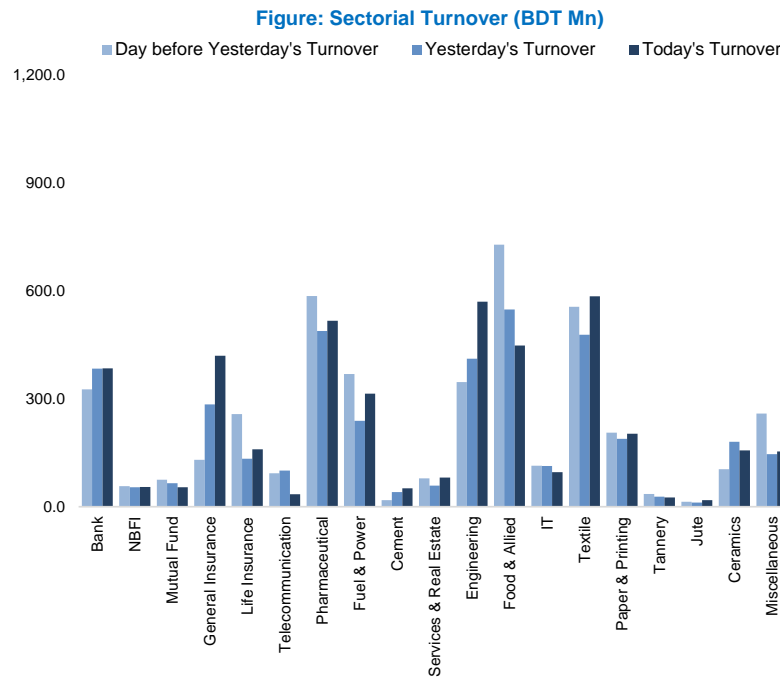
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,221.95	5,225.61	-3.67	-0.07%	+0.1%
DS30	1,894.60	1,901.56	-6.96	-0.37%	-2.3%
DSES	1,163.31	1,165.28	-1.98	-0.17%	-0.5%
CDSET	1,046.82	1,048.72	-1.90	-0.18%	-1.8%

	Advanced	Declined	Unchanged	Total
All Category	143	190	64	397
A Category (Equity)	84	101	33	218
B Category (Equity)	33	41	8	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	26	48	23	97
Mutual Funds	6	12	18	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,748,591	6,755,706	-0.1%
Mn USD	55,316	55,375	
Turnover			
Mn BDT	4,483	4,146	
Mn USD	37	34	+8.1%
Volume			
Mn Shares	169	147	+15.5%
No. of Trade	150,485	137,319	+9.6%

* Based on Traded Scrips
* Average Interbank Exchange Rate is BDT 122.00 as of Mar 16, 2025

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Market PE 14.7x
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	1,438	1,446	-8.55	-0.59%	36	680,270	10.1%	384.1	8.9%	8.7x	0.7x	GP	438,577	12.4%	28.0	12.1x	6.8x
NBFI	1,063	1,071	-7.79	-0.73%	23	101,303	1.5%	55.1	1.3%	NM	NM	SQRPHARMA	195,374	5.5%	139.7	8.7x	1.5x
Mutual Fund	575	579	-3.54	-0.61%	37	26,449	0.4%	54.4	1.3%	NM	0.5x	BATBC	176,040	5.0%	20.2	10.1x	3.1x
General Insurance	2,677	2,606	+71.18	+2.73%	43	76,415	1.1%	419.4	9.7%	13.6x	1.2x	ROBI	147,186	4.1%	0.0	21.0x	2.1x
Life Insurance	1,786	1,783	+2.43	+0.14%	15	47,498	0.7%	159.5	3.7%	NM	NM	WALTONHIL	141,680	4.0%	1.8	10.7x	1.3x
Telecommunication	5,194	5,204	-9.94	-0.19%	3	609,050	9.0%	34.7	0.8%	13.7x	4.1x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,896	2,895	+1.43	+0.05%	34	549,044	8.1%	516.2	11.9%	13.3x	1.5x	BRACBANK	92,379	2.6%	23.8	8.3x	1.2x
Fuel & Power	1,079	1,083	-3.55	-0.33%	23	285,831	4.2%	314.0	7.3%	15.4x	0.6x	BERGERPBL	82,752	2.3%	1.4	24.1x	5.7x
Cement	1,815	1,813	+1.38	+0.08%	7	86,489	1.3%	50.9	1.2%	17.4x	1.9x	MARICO	75,068	2.1%	1.5	13.4x	9.9x
Services & Real Estate	1,009	1,017	-7.75	-0.76%	9	55,509	0.8%	81.0	1.9%	19.7x	0.4x	ISLAMIBANK	69,713	2.0%	14.5	14.9x	1.0x
Engineering	2,485	2,470	+14.37	+0.58%	42	280,310	4.2%	569.6	13.2%	12.7x	0.9x	RENATA	57,750	1.6%	3.0	19.5x	1.7x
Food & Allied	15,862	15,947	-84.78	-0.53%	21	290,238	4.3%	447.6	10.3%	15.8x	4.3x	LHB	55,514	1.6%	20.8	14.5x	3.0x
IT	1,982	1,986	-3.92	-0.20%	11	26,148	0.4%	95.7	2.2%	20.3x	1.7x	UNILEVERCL	48,105	1.4%	0.6	72.1x	19.7x
Textile	1,146	1,151	-5.13	-0.45%	58	119,307	1.8%	584.0	13.5%	81.1x	0.8x	DUTCHBANGL	44,556	1.3%	3.1	7.1x	0.9x
Paper & Printing	4,779	4,676	+103.47	+2.21%	6	21,591	0.3%	202.5	4.7%	NM	1.0x	ICB	44,057	1.2%	4.8	34.8x	1.0x
Tannery	1,968	1,987	-19.34	-0.97%	6	21,924	0.3%	25.7	0.6%	NM	1.6x	BXPHARMA	36,224	1.0%	12.8	5.7x	0.7x
Jute	12,318	12,393	-75.43	-0.61%	3	2,711	0.0%	18.4	0.4%	NM	NM	EBL	34,768	1.0%	8.2	5.3x	0.8x
Ceramics	421	409	+11.43	+2.79%	5	18,875	0.3%	156.5	3.6%	NM	1.2x	PUBALIBANK	33,895	1.0%	1.5	3.5x	0.6x
Miscellaneous	4,261	4,240	+20.97	+0.49%	15	231,391	3.4%	153.6	3.5%	94.7x	1.9x	POWERGRID	32,075	0.9%	4.6	NM	0.2x
Corporate Bond**	14,792	14,900	-107.98	-0.72%	16	32,396	0.5%	1.1	0.0%	NM	NM	CITYBANK	30,965	0.9%	17.5	4.3x	0.8x
Treasury Bond**	1,604	1,587	+17.01	+1.07%	234	3,185,352	47.2%	3.5	0.1%	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
SPCERAMICS	22.0	+10.0%	108.9	NM	0.7x	SQRPHARMA	108,958	7.7%	8.7x	1.5x	SQRPHARMA	220.4	+0.2%	139.7	8.7x	1.5x
STANDARINS	35.7	+9.8%	39.6	16.5x	1.7x	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	ORIONINFU	408.1	-2.0%	116.9	NM	26.6x
GLOBALINS	25.7	+9.8%	20.2	18.5x	1.7x	BEXIMCO	69,463	4.9%	NM	1.3x	BDTHAI	16.4	+4.5%	112.2	NM	0.6x
BPML	40.3	+9.8%	45.3	NM	0.6x	BATBC	50,233	3.6%	10.1x	3.1x	SPCERAMICS	22.0	+10.0%	108.9	NM	0.7x
SALAMCRST	29.2	+9.8%	43.3	NM	1.6x	WALTONHIL	46,773	3.3%	10.7x	1.3x	AIL	61.0	-7.0%	105.3	22.9x	2.6x
BENGALWTL	19.6	+9.50%	26.6	35.0x	0.8x	BRACBANK	46,489	3.3%	8.3x	1.2x	LOVELLO	86.0	-0.2%	104.1	38.8x	6.8x
DGIC	24.7	+9.3%	20.9	30.5x	2x	GP	44,708	3.2%	12.1x	6.8x	LINDEBD	959.6	-7.9%	92.6	2.3x	4.2x
ESQUIRENIT	26.4	+7.8%	25.7	15.5x	0.4x	RENATA	32,968	2.3%	19.5x	1.7x	GHAIL	15.2	+4.8%	90.4	NM	1.2x
SONARBAINS	25.6	+7.1%	9.1	NM	1.2x	BXPHARMA	23,409	1.7%	5.7x	0.7x	KTL	14.9	+6.4%	80.7	NM	1.0x
MEGHNAPEP	27.8	+6.5%	4.5	NM	0.4x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	BEACHHATCH	121.2	-0.1%	76.1	35.5x	8.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	OLYMPIC	ALARABANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
LINDEBD	959.6	-7.9%	92.6	2.3x	4.2x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	UTTARABANK	24.4	24.4	2.0	2,000	48.80
AIL	61.0	-7.0%	105.3	22.9x	3x	15.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	FINEFOODS	187.1	187.0	2.0	113	21.13
ARAMITCEM	14.6	-5.2%	2.8	NM	NM	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	BEACHHATCH	117.0	111.0	4.0	157	18.13
MITHUNKNIT	15.1	-4.4%	1.6	NM	4.7x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	GQBALLPEN	163.0	163.0	1.0	41	6.69
METROSPIN	13.3	-4.3%	3.6	NM	2.6x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	PREMIERCEM	50.0	50.0	5.0	100	5.00
ATLASBANG	49.2	-3.9%	0.4	NM	0.4x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	LOVELLO	90.0	90.0	1.0	48	4.32
ICBEPMF1S1	5.0	-3.8%	0.0	NM	0.9x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	ASIATICLAB	36.0	36.0	1.0	100	3.60
SONARGAON	43.4	-3.8%	17.9	NM	2.3x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	RDFOOD	28.2	28.2	1.0	119	3.36
HFL	10.5	-3.7%	2.6	NM	0.3x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	HAMI	108.5	108.0	3.0	31	3.35
SBACBANK	8.5	-3.4%	7.1	4.8x	0.6x	14.5x	15.7x	15.0x	52.1x	3.8x	21.0x	8.3x	NM	5.0x	INTRACO	23.8	19.6	2.0	143	3.23

* 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
UTTARABANK	24.4	24.4	48.8	2,000	2
FINEFOODS	187.1	187.0	21.1	113	2
BEACHHATCH	117.0	111.0	18.1	157	4
GQBALLPEN	163.0	163.0	6.7	41	1
PREMIERCEM	50.0	50.0	5.0	100	5
LOVELLO	90.0	90.0	4.3	48	1
ASIATICLAB	36.0	36.0	3.6	100	1
RDFOOD	28.2	28.2	3.4	119	1
HAMI	108.5	108.0	3.4	31	3
INTRACO	23.8	19.6	3.2	143	2
ACFL	19.3	19.3	3.1	161	1
AL-HAJTEX	150.0	150.0	3.0	20	3
KBPPWBIL	155.0	155.0	3.0	19	1
RELIANCE1	22.4	21.0	2.8	127	2
SUNLIFEINS	76.0	62.5	1.8	27	2
FARCHEM	24.6	24.6	1.8	72	2
IBBLPBOND	786.0	786.0	1.8	2	1
TECHNODRUG	36.0	36.0	1.6	45	1
ICB	54.2	53.5	1.6	30	2
BPML	39.0	39.0	1.6	40	1
SIBL	11.0	11.0	1.4	130	2
LRBDL	14.2	14.2	1.4	100	1
Total			155.9		61

Important DSE News

PRIMEBANK

The Board of Directors has recommended 17.50% Cash and 2.50% Stock Dividend for the year ended December 31, 2024. Date of AGM: 05.05.2025, Time: 11:00 AM, Venue: Virtual meeting through online/ Digital Platform. Record Date: 10.04.2025. The Company has also reported Consolidated EPS of Tk. 6.47, Consolidated NAV per share of Tk. 34.07 and Consolidated NOCFPS of Tk. 2.90 for the year ended December 31, 2024. as against Tk. 4.25, Tk. 29.57 and Tk. 10.09 respectively for the year ended December 31, 2023.

PREMIERCEM

The company has informed that the Board of Directors' meeting of the company held on March 13, 2025 took the following decisions: a) The Proposed Amalgamation of the National Cement Mills Limited and Premier Power Generation Limited, with Premier Cement Mills PLC continuing as the surviving entity, be and is hereby approved.

LINDEBD

The Board of Directors has recommended final dividend of Tk. 40.00 per share (400%) for the year ended December 31, 2024 (i.e. total 4500% cash dividend for the year 2024 inclusive of 4100% interim cash dividend which has already been paid). Date of AGM: 29-May-2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 09-April-2025. The company has reported EPS including ex-ordinary income of Tk. 421.94 and EPS excluding ex-ordinary income of Tk. 24.92 for the year ended December 31, 2024 as against Tk. 15.02 and Tk. 15.02 respectively for the year ended December 31, 2023. The company has also reported NAV per share of Tk. 229.34 and NOCFPS of Tk. 24.20 for the year ended December 31, 2024 as against Tk. 371.27 and Tk. 36.33 respectively for the year ended December 31, 2023.

SINGERBD

Refer to their earlier news disseminated by DSE on 28.01.2025 regarding dividend declaration, the company has further informed that it will consider, if thought fit, to pass the following resolution as a Special Business in the upcoming AGM of the company to be held on April 22, 2025. Special Business: "RESOLVED that the shareholders of Singer Bangladesh Limited hereby approved the addition of tangible assets for Taka 6,038,891,163 from different unrelated parties with several transactions and out of which Taka 5,803,370,787 was for machinery equipment and construction of the new Home Appliances Plant at Bangladesh Special Economic Zone (BSEZ).

ARAMIT

The Company will be placed in 'A' category from existing 'Z' category with effect from March 17, 2025 as the Company has reported disbursement of 20% Cash Dividend for the year ended June 30, 2024.

QUASEMIND

The Company will be placed in 'B' category from existing 'Z' category with effect from March 17, 2025 as the Company has reported disbursement of 1.50% Cash Dividend for the year ended June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

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