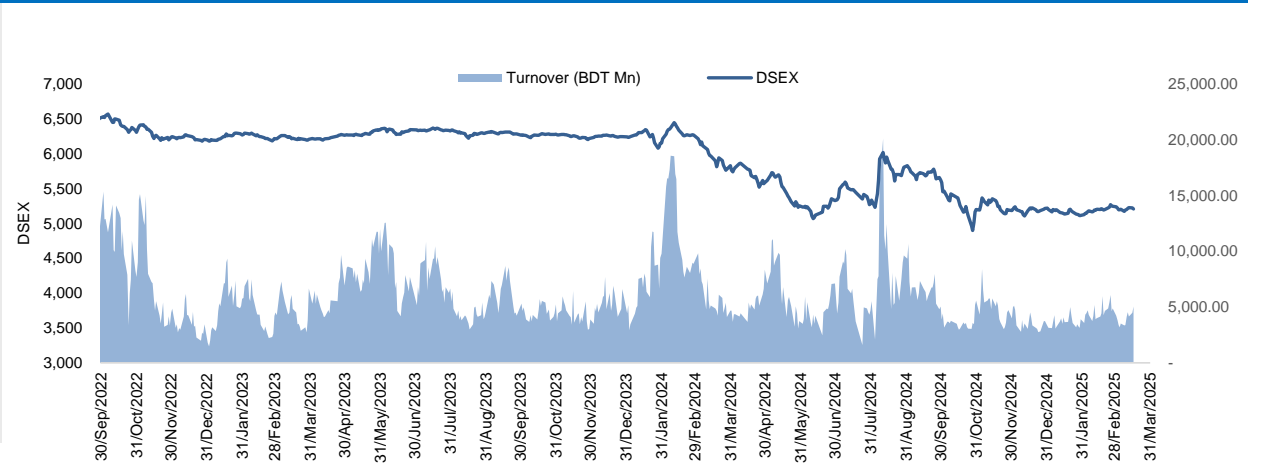


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.32%) lost 16.51 points and closed at 5,205.44. The blue-chip index DS30 (-0.32%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (-0.38%) closed at 1,888.59, 1,161.84, and 1,042.80 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 2.12% followed by NBF1 (-0.99%), Fuel & Power (-0.80%), Food & Allied (-0.43%), Engineering (-0.21%), Pharmaceutical (-0.19%), and Bank (-0.02%), respectively. Block trades contributed 3.8% of the overall market turnover. Shinepukur Ceramics Limited (+5.5%) was the most traded share with a turnover of BDT 241 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,205.44	5,221.95	-16.51	-0.32%	-0.2%
DS30	1,888.59	1,894.60	-6.01	-0.32%	-2.6%
DSES	1,161.84	1,163.31	-1.47	-0.13%	-0.6%
CDSET	1,042.80	1,046.82	-4.02	-0.38%	-2.2%

	Advanced	Declined	Unchanged	Total
All Category	97	221	78	396
A Category (Equity)	48	129	43	220
B Category (Equity)	28	45	9	82
N Category (Equity)	0	0	1	1
Z Category (Equity)	21	47	25	93
Mutual Funds	9	10	17	36
Corporate Bonds	2	0	2	4
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,729,614	6,748,591	-0.3%
	Mn USD	55,161	55,316	
Turnover	Mn BDT	5,052	4,483	+12.7%
	Mn USD	41	37	
Volume	Mn Shares	196	169	+15.7%
No. of Trade		152,633	150,485	+1.4%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 17, 2025

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Figure: Sectorial Turnover (BDT Mn)

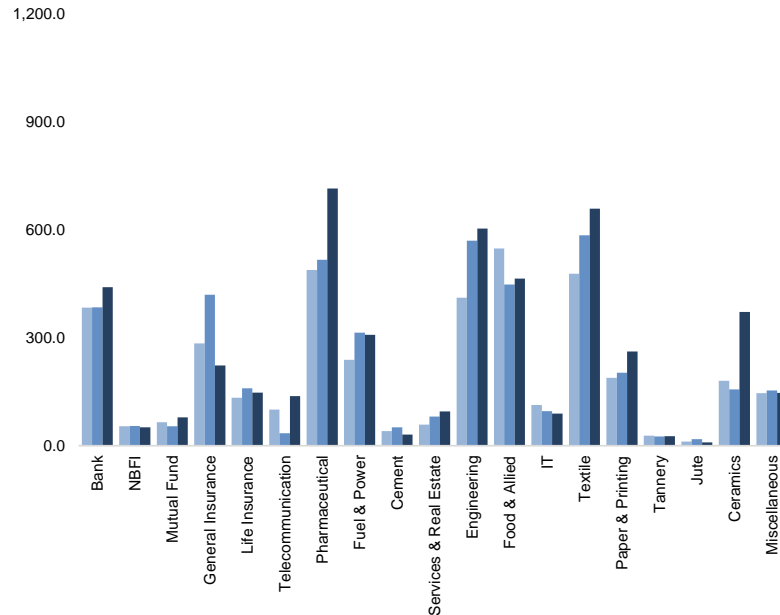
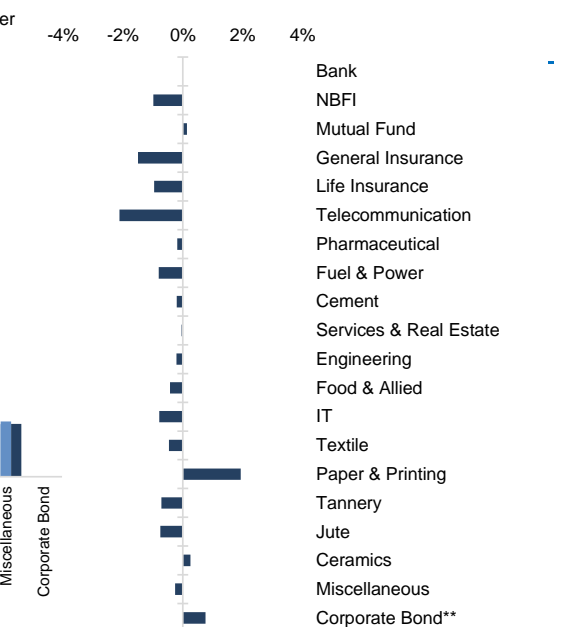


Figure: Sectorial Mcap Change



Market PE 14.6x
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	1,437	1,438	-0.27	-0.02%	36	680,141	10.1%	440.0	9.1%	8.7x	0.7x	GP	435,607	12.4%	61.5	12.0x	6.7x
NBFI	1,053	1,063	-10.48	-0.99%	23	100,304	1.5%	51.3	1.1%	NM	NM	SQRPHARMA	194,931	5.5%	215.0	8.7x	1.5x
Mutual Fund	576	575	+0.80	+0.14%	37	26,485	0.4%	79.1	1.6%	NM	0.5x	BATBC	174,960	5.0%	12.2	10.0x	3.0x
General Insurance	2,637	2,677	-40.06	-1.50%	43	75,271	1.1%	222.6	4.6%	13.4x	1.1x	WALTONHIL	141,316	4.0%	1.7	10.7x	1.3x
Life Insurance	1,769	1,786	-17.16	-0.96%	15	47,042	0.7%	147.7	3.0%	NM	NM	ROBI	137,234	3.9%	74.0	19.6x	2.0x
Telecommunication	5,084	5,194	-109.89	-2.12%	3	596,164	8.9%	138.0	2.8%	13.4x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,891	2,896	-5.43	-0.19%	34	548,015	8.1%	714.5	14.7%	13.2x	1.5x	BRACBANK	92,379	2.6%	20.4	8.3x	1.2x
Fuel & Power	1,070	1,079	-8.67	-0.80%	23	283,535	4.2%	307.6	6.3%	15.3x	0.6x	BERGERPBL	82,441	2.3%	1.3	24.0x	5.7x
Cement	1,811	1,815	-3.60	-0.20%	7	86,317	1.3%	30.9	0.6%	17.3x	1.9x	MARICO	74,674	2.1%	3.9	13.3x	9.8x
Services & Real Estate	1,009	1,009	-0.37	-0.04%	9	55,488	0.8%	95.5	2.0%	19.7x	0.4x	ISLAMIBANK	69,552	2.0%	7.8	14.9x	1.0x
Engineering	2,480	2,485	-5.30	-0.21%	42	279,712	4.2%	602.5	12.4%	12.7x	0.9x	RENATA	57,704	1.6%	3.5	19.5x	1.7x
Food & Allied	15,794	15,862	-67.92	-0.43%	21	288,995	4.3%	463.9	9.5%	15.8x	4.3x	LHB	55,398	1.6%	7.0	14.5x	3.0x
IT	1,967	1,982	-15.53	-0.78%	11	25,943	0.4%	89.5	1.8%	20.1x	1.7x	UNILEVERCL	48,184	1.4%	0.1	72.2x	19.7x
Textile	1,140	1,146	-5.31	-0.46%	58	118,755	1.8%	657.9	13.5%	80.7x	0.8x	DUTCHBANGL	44,820	1.3%	5.5	7.2x	0.9x
Paper & Printing	4,871	4,779	+92.35	+1.93%	6	22,008	0.3%	261.7	5.4%	NM	1.0x	ICB	43,623	1.2%	7.7	34.4x	1.0x
Tannery	1,954	1,968	-13.99	-0.71%	6	21,768	0.3%	26.6	0.5%	NM	1.6x	BXPHARMA	36,760	1.0%	56.5	5.7x	0.7x
Jute	12,225	12,318	-92.75	-0.75%	3	2,691	0.0%	9.5	0.2%	NM	NM	EBL	34,768	1.0%	9.8	5.3x	0.8x
Ceramics	422	421	+1.07	+0.26%	5	18,923	0.3%	371.6	7.6%	NM	1.2x	PUBALIBANK	33,779	1.0%	1.6	3.5x	0.6x
Miscellaneous	4,250	4,261	-10.81	-0.25%	15	230,804	3.4%	147.0	3.0%	94.4x	1.9x	POWERGRID	31,618	0.9%	4.9	NM	0.2x
Corporate Bond**	14,903	14,792	+111.86	+0.76%	16	32,641	0.5%	0.5	0.0%	NM	NM	CITYBANK	30,965	0.9%	19.5	4.3x	0.8x
Treasury Bond**	1,604	1,585	+19.71	+1.24%	234	3,188,115	47.4%	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
MHSMML	16.5	+10.0%	43.8	21.7x	0.8x	SQRPHARMA	108,958	7.7%	8.7x	1.5x	SPCERAMICS	23.2	+5.5%	240.9	NM	0.8x
RRMSTEEL	13.5	+9.8%	12.0	NM	0.3x	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	SQRPHARMA	219.9	-0.2%	215.0	8.7x	1.5x
ARAMITCEM	16.0	+9.6%	4.0	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	AIL	61.2	+0.3%	141.1	23.0x	2.6x
BPML	44.0	+9.2%	92.1	NM	0.6x	BATBC	50,233	3.6%	10.0x	3.0x	ORIONINFU	408.4	+0.1%	119.8	NM	26.6x
EBL1STMF	6.2	+8.8%	9.7	NM	0.7x	WALTONHIL	46,773	3.3%	10.7x	1.3x	FUWANGCER	15.6	+7.6%	116.6	91.8x	1.3x
SEMLLECMF	7.6	+8.57%	12.7	NM	0.8x	BRACBANK	46,489	3.3%	8.3x	1.2x	FUWANGFOOL	17.0	+3.7%	98.9	NM	8.1x
FUWANGCER	15.6	+7.6%	116.6	91.8x	1x	GP	44,708	3.2%	12.0x	6.7x	BPML	44.0	+9.2%	92.1	NM	0.6x
GLOBALINS	27.4	+6.6%	27.4	19.7x	1.8x	RENATA	32,968	2.3%	19.5x	1.7x	BEACHHATCH	121.4	+0.2%	87.6	35.6x	8.0x
EIL	48.7	+6.6%	44.2	34.1x	2.5x	BXPHARMA	23,409	1.7%	5.7x	0.7x	INTRACO	22.3	+2.3%	84.9	22.8x	1.7x
SOUTHEASTB	10.2	+6.3%	40.0	19.8x	0.4x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	BDTHAI	16.3	-0.6%	84.1	NM	0.6x

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)
NBL	4.1	-6.8%	3.0	NM	2.2x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	EIL	41.2	41.2	6.0	1,500	61.80
ROBI	26.2	-6.8%	74.0	19.6x	2x	15.7x	15.7x	15.2x	52.0x	3.8x	19.6x	8.5x	NM	5.0x	UTTARABANK	24.4	24.4	3.0	2,000	48.80
MAGURAPLEX	85.3	-6.2%	37.3	25.6x	1.1x	2.5x	2.5x	2.5x	1.1x	0.7x	2.0x	0.8x	2.2x	BEACHHATCH	119.0	117.0	5.0	209	24.64	
DBH1STMF	3.7	-5.1%	0.0	NM	0.4x	1.1x	1.1x	1.1x	1.1x	1.1x	2.0x	0.8x	2.2x	BEACONPHAR	116.3	116.2	2.0	178	20.73	
MBL1STMF	3.8	-5.0%	0.2	NM	0.4x	0.4x	0.4x	0.4x	0.4x	0.4x	0.8x	0.8x	0.8x	EASTRNLU	1,502.0	1,502.0	1.0	3	4.51	
PRIME1ICBA	4.3	-4.4%	1.4	NM	0.7x	0.7x	0.7x	0.7x	0.7x	0.7x	0.8x	0.8x	0.8x	BEXIMCO	99.1	99.1	6.0	34	3.38	
QUASEMIND	32.6	-4.4%	37.7	69.4x	1.1x	1.1x	1.1x	1.1x	1.1x	1.1x	2.0x	2.0x	2.2x	MTB	12.8	12.8	4.0	240	3.07	
SICL	22.6	-4.2%	6.7	NM	1.3x	1.3x	1.3x	1.3x	1.3x	1.3x	2.0x	2.0x	2.2x	HAKKANIPUL	72.4	72.4	1.0	41	3.00	
TILIL	43.8	-3.9%	38.6	18.6x	NM	1.8x	1.8x	1.8x	1.8x	1.8x	2.0x	2.0x	2.2x	ALLTEX	13.7	12.8	3.0	220	2.93	
TAKAFULINS	34.1	-3.9%	0.1	23.0x	1.8x	1.8x	1.8x	1.8x	1.8x	1.8x	2.0x	2.0x	2.2x	JAMUNAOIL	189.1	189.1	1.0	15	2.84	

* 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
						NRBBANK
EIL	41.2	41.2	61.8	1,500	6	The company has informed that Bangladesh Bank, vide its order/letter dated March 12, 2025, has dissolved the Board of Directors of NRB Bank PLC. and reconstituted the Board of Directors and appointed the following Director and Independent Directors to the Board of the Bank: 01. Mr. Iqbal Ahmed OBE DBA (Director), 02. Ms. Ferdous Ara Begum (Independent Director), (Continuation News of NRBBANK): 03. Mr. Shaikh Md. Salim (Independent Director), 04. Mr. Md. Quamrul Islam Chowdhury (Independent Director), 05. Mr. Sk. Matiur Rahman (Independent Director), 06. Professor Dr. Sharif Nurul Ahkam (Independent Director) and 07. Mr. A K M Mizanur Rahman FCA (Independent Director).
UTTARABANK	24.4	24.4	48.8	2,000	3	
BEACHHATCH	119.0	117.0	24.6	209	5	
BEACONPHAR	116.3	116.2	20.7	178	2	
EASTRNLUB	1,502.0	1,502.0	4.5	3	1	
BEXIMCO	99.1	99.1	3.4	34	6	
MTB	12.8	12.8	3.1	240	4	
HAKKANIPUL	72.4	72.4	3.0	41	1	
ALLTEX	13.7	12.8	2.9	220	3	
JAMUNAOIL	189.1	189.1	2.8	15	1	
MONNOCERA	95.0	87.0	2.5	28	2	
ORIONINFU	420.1	402.1	2.1	5	2	
DAFODILCOM	67.2	67.1	1.9	28	2	
TILIL	47.5	47.5	1.3	28	2	
HAMI	104.6	104.5	1.3	13	2	
AL-HAJTEX	152.0	152.0	1.3	9	1	
FEKDIL	18.1	18.1	1.1	58	2	
FINEFOODS	212.7	212.7	0.9	4	1	
SPCERAMICS	22.0	22.0	0.8	37	1	
LRBDL	14.2	14.2	0.7	50	1	
BDCOM	26.5	26.5	0.7	26	1	
NRBBANK	13.7	13.7	0.7	50	1	
Total			193.6		55	

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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