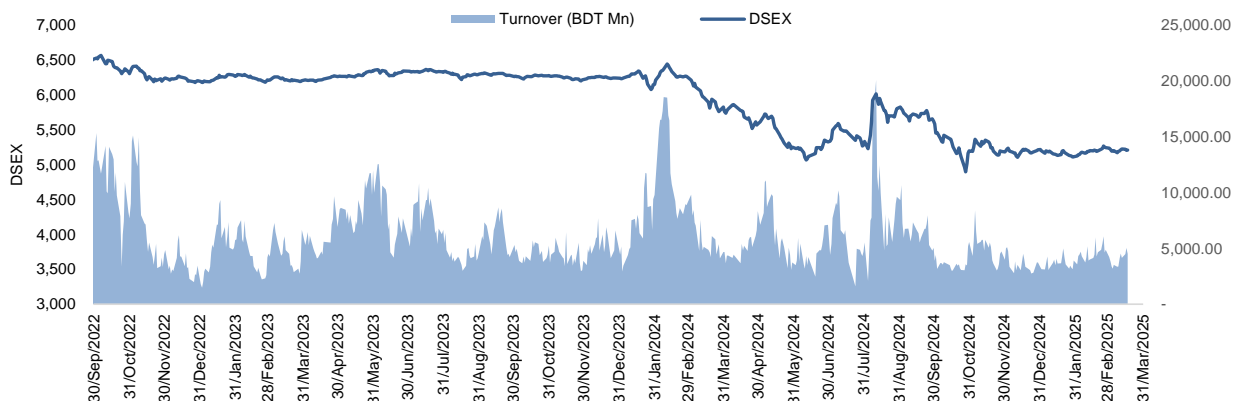


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.09%) gained 4.86 points and closed at 5,210.30. The blue-chip index DS30 (-0.34%), the Shariah-based index DSES (-0.20%), and the large-cap index CDSET (-0.04%) closed at 1,882.10, 1,159.56, and 1,042.39 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.84%, followed by NBF1 (+0.70%), Bank (+0.16%), Pharmaceutical (-0.08%), Telecommunication (-0.13%), Food & Allied (-0.26%), and Engineering (-0.31%), respectively. Block trades contributed 7.0% of the overall market turnover. Intraco Refueling Station Limited (+9.4%) was the most traded share with a turnover of BDT 189 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,210.30	5,205.44	+4.86	+0.09%	-0.1%
DS30	1,882.10	1,888.59	-6.49	-0.34%	-3.0%
DSES	1,159.56	1,161.84	-2.28	-0.20%	-0.8%
CDSET	1,042.39	1,042.80	-0.41	-0.04%	-2.2%

	Advanced	Declined	Unchanged	Total
All Category	186	156	56	398
A Category (Equity)	117	83	20	220
B Category (Equity)	40	34	9	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	29	39	27	95
Mutual Funds	32	1	3	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,738,417	6,729,614	+0.1%
Mn USD	55,233	55,161	
Turnover			
Mn BDT	4,512	5,052	-10.7%
Mn USD	37	41	
Volume			
Mn Shares	198	196	+0.8%
No. of Trade	138,136	152,633	-9.5%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 18, 2025

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Figure: Sectorial Turnover (BDT Mn)

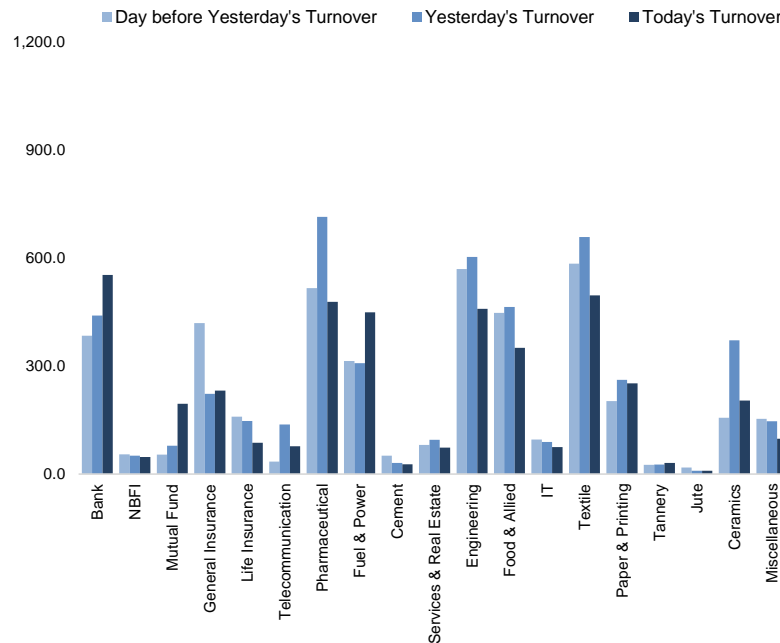
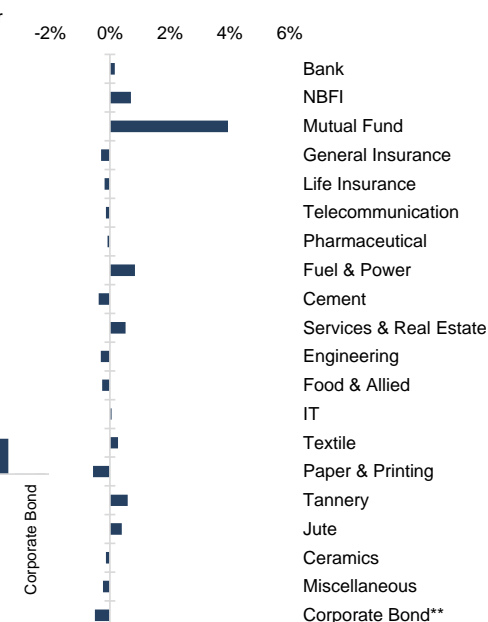


Figure: Sectorial Mcap Change



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	1,440	1,437	+2.32	+0.16%	36	681,237	10.1%	553.1	13.2%	8.7x	0.7x	GP	433,716	12.3%	38.6	11.9x	6.7x
NBFI	1,060	1,053	+7.36	+0.70%	23	101,006	1.5%	47.5	1.1%	NM	NM	SQURPHARMA	195,551	5.5%	147.9	8.7x	1.5x
Mutual Fund	599	576	+22.73	+3.94%	37	27,530	0.4%	195.5	4.7%	NM	0.5x	BATBC	174,960	5.0%	10.7	10.0x	3.0x
General Insurance	2,629	2,637	-7.73	-0.29%	43	75,051	1.1%	231.6	5.5%	13.3x	1.1x	WALTONHIL	140,801	4.0%	3.3	10.7x	1.3x
Life Insurance	1,766	1,769	-3.19	-0.18%	15	46,957	0.7%	87.0	2.1%	NM	NM	ROBI	138,281	3.9%	33.5	19.7x	2.0x
Telecommunication	5,077	5,084	-6.71	-0.13%	3	595,378	8.8%	77.5	1.8%	13.3x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,888	2,891	-2.24	-0.08%	34	547,590	8.1%	478.4	11.4%	13.2x	1.5x	BRACBANK	92,025	2.6%	43.5	8.3x	1.2x
Fuel & Power	1,079	1,070	+8.97	+0.84%	23	285,912	4.2%	448.8	10.7%	15.4x	0.6x	BERGERPBL	82,214	2.3%	1.3	24.0x	5.7x
Cement	1,804	1,811	-6.84	-0.38%	7	85,991	1.3%	27.3	0.7%	17.3x	1.9x	MARICO	74,784	2.1%	4.2	13.4x	9.8x
Services & Real Estate	1,014	1,009	+5.29	+0.52%	9	55,779	0.8%	73.6	1.8%	19.8x	0.4x	ISLAMIBANK	70,035	2.0%	6.3	15.0x	1.0x
Engineering	2,472	2,480	-7.58	-0.31%	42	278,857	4.1%	458.6	10.9%	12.7x	0.9x	RENATA	57,646	1.6%	2.2	19.5x	1.7x
Food & Allied	15,753	15,794	-40.94	-0.26%	21	288,246	4.3%	350.2	8.3%	15.7x	4.3x	LHB	55,049	1.6%	14.2	14.4x	3.0x
IT	1,968	1,967	+1.16	+0.06%	11	25,958	0.4%	74.7	1.8%	20.1x	1.7x	UNILEVERCL	47,147	1.3%	0.7	70.7x	19.3x
Textile	1,143	1,140	+3.12	+0.27%	58	119,080	1.8%	496.2	11.8%	80.9x	0.8x	DUTCHBANGL	44,468	1.3%	3.6	7.1x	0.9x
Paper & Printing	4,844	4,871	-27.49	-0.56%	6	21,884	0.3%	251.9	6.0%	NM	1.0x	ICB	43,883	1.2%	5.3	34.6x	1.0x
Tannery	1,965	1,954	+11.63	+0.60%	6	21,898	0.3%	31.2	0.7%	NM	1.6x	BXPHARMA	36,090	1.0%	11.2	5.6x	0.7x
Jute	12,274	12,225	+48.81	+0.40%	3	2,702	0.0%	9.6	0.2%	NM	NM	EBL	35,312	1.0%	20.3	5.4x	0.8x
Ceramics	421	422	-0.57	-0.14%	5	18,897	0.3%	204.3	4.9%	NM	1.2x	PUBALIBANK	33,548	1.0%	33.1	3.5x	0.6x
Miscellaneous	4,241	4,250	-9.72	-0.23%	15	230,276	3.4%	97.8	2.3%	94.2x	1.9x	POWERGRID	31,983	0.9%	1.2	NM	0.2x
Corporate Bond**	14,828	14,903	-75.11	-0.50%	16	32,477	0.5%	0.1	0.0%	NM	NM	CITYBANK	30,695	0.9%	45.2	4.3x	0.8x
Treasury Bond**	1,626	1,604	+21.98	+1.37%	234	3,195,241	47.4%	3.4	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
1STPRIMFMF	20.0	+9.9%	58.4	NM	1.9x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	INTRACO	24.4	+9.4%	188.5	24.9x	1.9x
PROGRESLIF	57.0	+9.8%	6.6	NM	NM	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	SQURPHARMA	220.6	+0.3%	147.9	8.7x	1.5x
SAFKOSPINN	13.5	+9.8%	4.9	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	FUWANGFOOL	18.1	+6.5%	133.2	NM	8.7x
INTRACO	24.4	+9.4%	188.5	24.9x	1.9x	BATBC	50,233	3.6%	10.0x	3.0x	SPCERAMICS	22.5	-3.0%	121.1	NM	0.8x
ABB1STMF	3.5	+9.4%	32.0	NM	0.4x	WALTONHIL	46,773	3.3%	10.7x	1.3x	HAKKANIPUL	72.5	+2.4%	114.0	NM	3.0x
PRIME1ICBA	4.7	+9.30%	2.8	NM	0.8x	BRACBANK	46,489	3.3%	8.3x	1.2x	ORIONINFU	404.2	-1.0%	98.0	NM	26.4x
SEMLFBSLGF	4.9	+8.9%	5.6	NM	0x	GP	44,708	3.2%	11.9x	6.7x	UCB	12.8	+4.1%	92.1	4.8x	0.5x
DBH1STMF	4.0	+8.1%	4.7	NM	0.5x	RENATA	32,968	2.3%	19.5x	1.7x	KTL	15.2	+4.8%	80.7	NM	1.0x
EBL1STMF	6.7	+8.1%	9.3	NM	0.7x	BXPHARMA	23,409	1.7%	5.6x	0.7x	EIL	51.7	+6.2%	78.8	36.2x	2.7x
MBL1STMF	4.1	+7.9%	1.2	NM	0.5x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	AIL	61.7	+0.8%	71.9	23.2x	2.7x

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)
SALAMCRST	27.6	-8.0%	50.9	NM	1.5x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	MARICO	2,370.6	2,360.0	9.0	61	144.95
MEGCONMILK	24.3	-6.2%	0.5	NM	NM	15.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	EIL	53.0	44.0	18.0	2,083	102.25
RSRMSTEEL	12.7	-5.9%	2.2	NM	0.3x	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	SQURPHARMA	220.0	220.0	1.0	100	22.00
ILFSL	3.5	-5.4%	0.4	NM	NM	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	BEACHHATCH	121.4	110.0	4.0	111	12.60
SHYAMPSUG	119.6	-5.3%	2.2	NM	NM	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	RELIANCE1	20.5	20.5	2.0	211	4.33
KPPL	26.3	-4.4%	29.3	NM	NM	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	GP	326.0	294.5	3.0	11	3.54
BENGALWTL	19.9	-4.3%	21.3	35.5x	0.8x	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	ACMEPL	15.9	15.9	1.0	200	3.18
JUTESPINN	212.2	-3.9%	0.0	NM	NM	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	ACFL	19.4	19.4	1.0	161	3.12
FAMILYTEX	2.5	-3.8%	0.6	NM	0.2x	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	MEGHNAINS	29.9	29.9	1.0	90	2.69
USMANIAGL	35.8	-3.8%	0.1	NM	0.5x	1.5%	15.9x	15.3x	51.0x	3.8x	19.7x	8.5x	NM	5.0x	MIRAKHTER	37.9	37.9	1.0	65	2.46

* 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	Minimum	Turnover	Quantity	No. of	Important DSE News
	Price (BDT)	Price	(BDT Mn)	('000)	Trade	
MARICO	2,370.6	2,360.0	145.0	61	9	
EIL	53.0	44.0	102.2	2,083	18	
SQURPHARMA	220.0	220.0	22.0	100	1	
BEACHHATCH	121.4	110.0	12.6	111	4	
RELIANCE1	20.5	20.5	4.3	211	2	
GP	326.0	294.5	3.5	11	3	
ACMEPL	15.9	15.9	3.2	200	1	
ACFL	19.4	19.4	3.1	161	1	
MEGHNAINS	29.9	29.9	2.7	90	1	
MIRAKHTER	37.9	37.9	2.5	65	1	
SUNLIFEINS	71.8	60.0	2.5	37	3	
EASTRNLAB	1,704.6	1,630.0	2.3	1	2	
HAKKANIPUL	70.7	70.7	2.1	30	1	
SIBL	11.0	11.0	1.4	130	2	
BDTHAI	16.4	16.4	1.0	60	1	
ORIONINFU	419.0	419.0	0.8	2	1	
EASTERNINS	47.9	47.9	0.7	14	1	
DSSL	12.0	12.0	0.6	50	1	
KBPPWBIL	171.0	171.0	0.6	4	1	
PARAMOUNT	39.1	39.1	0.6	15	1	
Total			313.7		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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