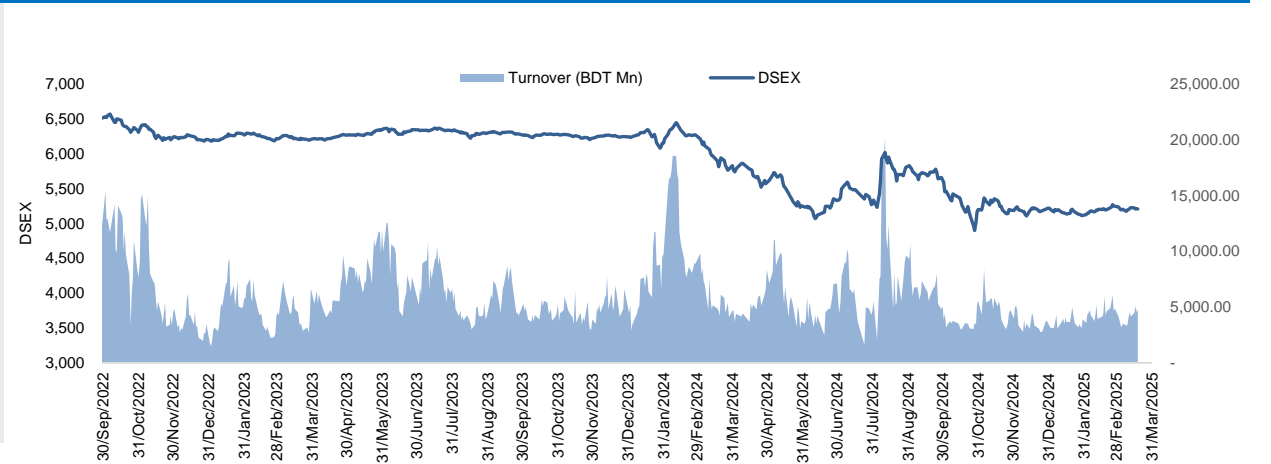


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.06%) lost 2.94 points and closed at 5,207.36. The blue-chip index DS30 (-0.04%), the Shariah-based index DSES (-0.12%), and the large-cap index CDSET (-0.04%) closed at 1,881.43, 1,158.21, and 1,041.96 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.23%, followed by Fuel & Power (+0.19%), Food & Allied (+0.09%), Engineering (+0.03%), Bank (-0.10%), Telecommunication (-0.54%), and NBF (-0.78%), respectively. Block trades contributed 5.6% of the overall market turnover. Shinepukur Ceramics Limited (+9.8%) was the most traded share with a turnover of BDT 134 million.



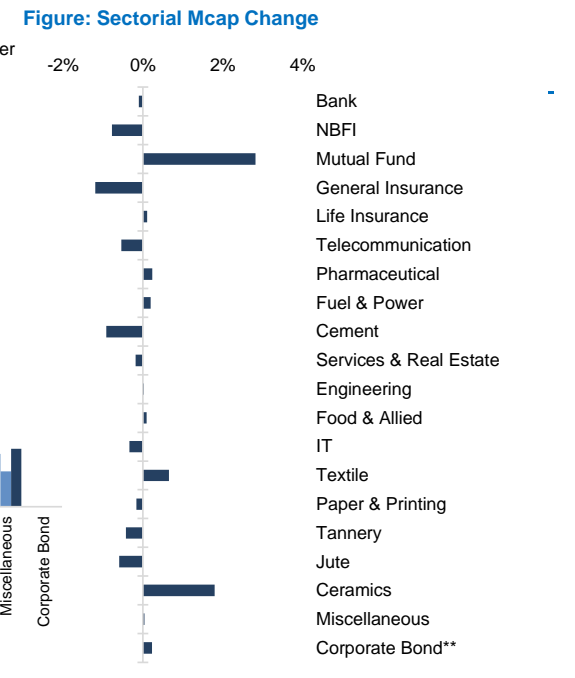
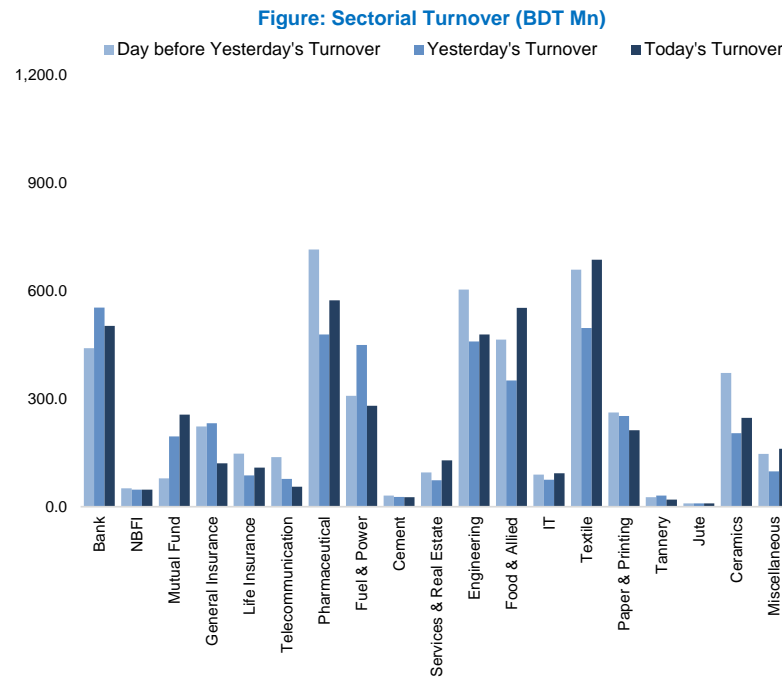
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,207.36	5,210.30	-2.94	-0.06%	-0.2%
DS30	1,881.43	1,882.10	-0.67	-0.04%	-3.0%
DSES	1,158.21	1,159.56	-1.35	-0.12%	-0.9%
CDSET	1,041.96	1,042.39	-0.43	-0.04%	-2.3%

	Advanced	Declined	Unchanged	Total
All Category	150	186	59	395
A Category (Equity)	78	117	23	218
B Category (Equity)	39	33	10	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	33	36	26	95
Mutual Funds	24	4	8	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,734,528	6,738,417	-0.1%
Mn USD	55,201	55,233	
Turnover			
Mn BDT	4,825	4,512	+6.9%
Mn USD	40	37	
Volume			
Mn Shares	226	198	+14.6%
No. of Trade	142,565	138,136	+3.2%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 19, 2025

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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	1,438	1,440	-1.48	-0.10%	36	680,538	10.1%	502.2	11.0%	8.6x	0.7x	GP	431,691	12.2%	28.4	11.9x	6.7x
NBFI	1,052	1,060	-8.24	-0.78%	23	100,220	1.5%	47.3	1.0%	NM	NM	SQURPHARMA	195,374	5.5%	107.1	8.7x	1.5x
Mutual Fund	616	599	+16.91	+2.82%	37	28,307	0.4%	255.5	5.6%	NM	0.5x	BATBC	175,338	5.0%	13.8	10.0x	3.0x
General Insurance	2,598	2,629	-31.32	-1.19%	43	74,156	1.1%	120.2	2.6%	13.2x	1.1x	WALTONHIL	140,316	4.0%	5.1	10.6x	1.3x
Life Insurance	1,767	1,766	+1.90	+0.11%	15	47,007	0.7%	108.5	2.4%	NM	NM	ROBI	137,234	3.9%	24.2	19.6x	2.0x
Telecommunication	5,050	5,077	-27.48	-0.54%	3	592,155	8.8%	55.6	1.2%	13.3x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,895	2,888	+6.79	+0.23%	34	548,877	8.2%	573.2	12.6%	13.3x	1.5x	BRACBANK	91,671	2.6%	29.9	8.3x	1.2x
Fuel & Power	1,081	1,079	+2.08	+0.19%	23	286,463	4.3%	280.1	6.1%	15.4x	0.6x	BERGERPBL	82,576	2.3%	1.6	24.1x	5.7x
Cement	1,788	1,804	-16.58	-0.92%	7	85,201	1.3%	26.2	0.6%	17.1x	1.9x	MARICO	75,134	2.1%	1.0	13.4x	9.9x
Services & Real Estate	1,012	1,014	-1.82	-0.18%	9	55,679	0.8%	129.0	2.8%	19.8x	0.4x	ISLAMIBANK	70,035	2.0%	9.7	15.0x	1.0x
Engineering	2,473	2,472	+0.72	+0.03%	42	278,938	4.1%	478.3	10.5%	12.7x	0.9x	RENATA	57,819	1.6%	6.5	19.5x	1.7x
Food & Allied	15,768	15,753	+14.55	+0.09%	21	288,512	4.3%	552.4	12.1%	15.7x	4.3x	LHB	54,120	1.5%	12.8	14.2x	2.9x
IT	1,961	1,968	-6.61	-0.34%	11	25,871	0.4%	92.6	2.0%	20.1x	1.7x	UNILEVERCL	47,182	1.3%	0.2	70.7x	19.3x
Textile	1,151	1,143	+7.43	+0.65%	58	119,854	1.8%	685.6	15.0%	81.4x	0.8x	DUTCHBANGL	44,732	1.3%	2.1	7.2x	0.9x
Paper & Printing	4,836	4,844	-7.93	-0.16%	6	21,848	0.3%	212.1	4.7%	NM	1.0x	ICB	43,189	1.2%	7.1	34.1x	1.0x
Tannery	1,957	1,965	-8.33	-0.42%	6	21,805	0.3%	19.7	0.4%	NM	1.6x	BXPHARMA	37,027	1.1%	52.7	5.8x	0.7x
Jute	12,201	12,274	-72.72	-0.59%	3	2,686	0.0%	9.1	0.2%	NM	NM	EBL	35,176	1.0%	7.5	5.4x	0.8x
Ceramics	429	421	+7.58	+1.80%	5	19,237	0.3%	247.1	5.4%	NM	1.2x	PUBALIBANK	33,664	1.0%	34.7	3.5x	0.6x
Miscellaneous	4,242	4,241	+1.73	+0.04%	15	230,370	3.4%	161.2	3.5%	94.2x	1.9x	POWERGRID	32,714	0.9%	6.1	NM	0.3x
Corporate Bond**	14,863	14,828	+34.24	+0.23%	16	32,552	0.5%	0.1	0.0%	NM	NM	CITYBANK	30,830	0.9%	12.2	4.3x	0.8x
Treasury Bond**	1,645	1,626	+18.33	+1.13%	234	3,193,785	47.4%	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
PADMALIFE	22.0	+10.0%	4.9	NM	NM	SQURPHARMA	108,958	7.7%	8.7x	1.5x	SPCERAMICS	24.7	+9.8%	133.6	NM	0.8x
DBH1STMF	4.4	+10.0%	4.5	NM	0.5x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	INTRACO	25.3	+3.7%	131.2	25.8x	2.0x
1STPRIMFMF	22.0	+10.0%	70.4	NM	2.1x	BEXIMCO	69,463	4.9%	NM	1.3x	UTTARABANK	25.5	+1.6%	129.5	8.5x	0.8x
SALAMCRST	30.3	+9.8%	50.3	NM	1.7x	BATBC	50,233	3.6%	10.0x	3.0x	FUWANGFOOL	18.0	-0.6%	129.5	NM	8.6x
SPCERAMICS	24.7	+9.8%	133.6	NM	0.8x	WALTONHIL	46,773	3.3%	10.6x	1.3x	LOVELLO	84.2	+0.6%	118.6	37.9x	6.7x
SALVOCHEM	25.6	+8.94%	51.1	44.9x	1.6x	BRACBANK	46,489	3.3%	8.3x	1.2x	AIL	59.5	-3.6%	107.4	22.3x	2.6x
SHARPIND	22.1	+8.9%	27.5	34.0x	2x	GP	44,708	3.2%	11.9x	6.7x	SQURPHARMA	220.4	-0.1%	107.1	8.7x	1.5x
EBLNRBMF	3.8	+8.6%	11.4	NM	0.4x	RENATA	32,968	2.3%	19.5x	1.7x	BDTHAI	16.8	+5.7%	103.5	NM	0.6x
MBL1STMF	4.4	+7.3%	5.6	NM	0.5x	BXPHARMA	23,409	1.7%	5.8x	0.7x	ETL	11.1	+6.7%	103.3	48.1x	0.9x
HAMI	114.3	+6.9%	13.9	NM	12.6x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	ORIONINFU	401.3	-0.7%	99.0	NM	26.2x

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)
TALLUSPIN	5.6	-5.1%	1.0	NM	0.4x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	BANKASIA	18.5	18.5	1.0	5,830	107.86
SAMATALETH	45.5	-4.2%	2.4	NM	3x	15.9x	15.9x	15.3x	50.2x	3.8x	19.6x	8.5x	NM	5.0x	BEACHHATCH	130.0	112.0	5.0	269	32.40
SEMLFBSLGF	4.7	-4.1%	2.5	NM	0.5x	14.2x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	MARICO	2,400.0	2,374.0	2.0	13	30.59
SONARGAON	43.1	-4.0%	19.9	NM	2.3x	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	KBPPWBIL	151.0	148.0	11.0	171	25.74
MITHUNKNIT	14.4	-4.0%	3.3	NM	4.5x	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	AL-HAJTEX	150.0	145.0	5.0	64	9.43
AIL	59.5	-3.6%	107.4	22.3x	2.6x	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	METROSPIN	12.8	12.8	1.0	688	8.81
PRAGATIINS	51.8	-3.5%	1.4	9.5x	0.9x	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	BEXIMCO	99.1	99.1	15.0	77	7.59
KPPL	25.4	-3.4%	33.8	NM	NM	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	SEMLLECMF	7.5	7.5	2.0	1,000	7.50
STYLECRAFT	61.6	-3.3%	5.3	NM	10.7x	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	LOVELLO	76.0	76.0	2.0	84	6.35
MAGURAPLEX	84.0	-3.0%	16.4	25.2x	1.1x	15.9x	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	EIL	56.7	56.7	1.0	100	5.67

* 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
BANKASIA	18.5	18.5	107.9	5,830	1
BEACHHATCH	130.0	112.0	32.4	269	5
MARICO	2,400.0	2,374.0	30.6	13	2
KBPPWBIL	151.0	148.0	25.7	171	11
AL-HAJTEX	150.0	145.0	9.4	64	5
METROSPIN	12.8	12.8	8.8	688	1
BEXIMCO	99.1	99.1	7.6	77	15
SEMILLECMF	7.5	7.5	7.5	1,000	2
LOVELLO	76.0	76.0	6.4	84	2
EIL	56.7	56.7	5.7	100	1
SUNLIFEINS	73.1	66.0	4.2	62	4
BRACBANK	52.0	52.0	3.4	65	1
NLTUBES	80.2	80.2	3.2	40	2
NRBBANK	12.9	12.9	2.9	225	3
ISLAMIBANK	45.5	45.5	2.3	50	1
DAFODILCOM	67.1	66.0	2.3	34	2
GQBALLPEN	145.0	145.0	1.7	11	2
ORIONINFU	418.0	414.0	1.4	3	2
UNITEDINS	38.8	38.8	1.0	26	1
SHEPHERD	19.0	19.0	1.0	50	1
TILIL	46.5	46.5	0.7	16	1
CITYGENINS	37.0	37.0	0.7	20	1
Total			269.2		70

Important DSE News

UTTARABANK

The Board of Directors has recommended 17.50% Cash and 17.50% Stock Dividend for the year ended December 31, 2024. Date of AGM: 12.05.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 20.04.2025. The Company has also reported Consolidated EPS of Tk. 5.79, Consolidated NAV per share of Tk. 32.07 and Consolidated NOCFPS of Tk. 7.70 for the year ended December 31, 2024 as against Tk. 3.84, Tk. 27.59 and Tk. (12.83) respectively for the year ended December 31, 2023.

NTC

Refer to their earlier news disseminated by DSE on 20.10.2024 regarding extension of time for subscription of the proposed capital raising, the company has further informed that BSEC had given consent for extend the time for validity of consent letter to 31st March, 2025 for raising of capital of Tk.279,70,02,000 (Two hundred seventy nine crore seventy lakh two thousand) only through issuance of 2,34,00,000 ordinary shares of Tk. 119.53 each to the shareholders of the company in cash consideration for those who did not subscribe yet for placement share. The time period for collection of subscription of the proposed capital raising of the company has been fixed as below. Subscription start date: 20.03.2025 (During Banking Hours), Subscription closing date: 27.03.2025 (During Banking hours). Please note that the Bankers to the issue for placement share issue: Sonali Bank PLC. and Pubali Bank PLC. All other information of Price Sensitive Information dated 16-04-2023 in this regard will be unchanged.

BATBC

In response to a DSE query letter to the company regarding a news published in a newspaper titled "BATB may face legal action over labour law violations" on March 16, 2025, in response the company has informed DSE, among others, the following: "As a responsible company, British American Tobacco Bangladesh (BATB) is committed to full compliance with the local laws and regulations We have noted all the regulatory observations by DIFE and are engaging with the relevant authorities as appropriate. We have outlined the measures we have undertaken as well as those currently in progress and have engaged with DIFE on these matters. BATB strictly adheres to all applicable laws and ensures that all employees receive the benefits they are entitled to under the country's legal framework."

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
UTTARABANK		17.5%	17.5%	Record Date	20-Apr-25

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