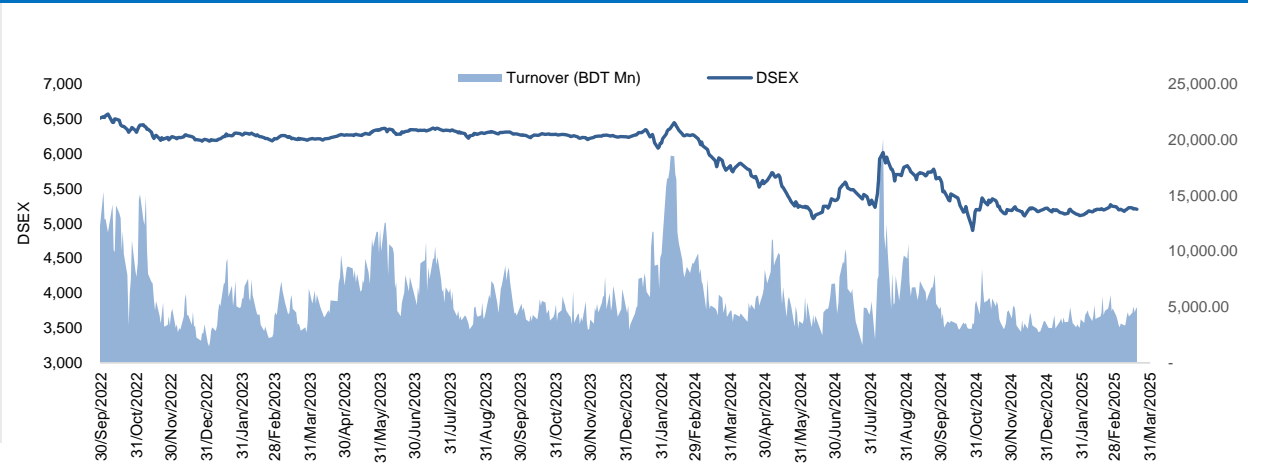


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.11%) lost 5.66 points and closed at 5,201.70. The blue-chip index DS30 (+0.34%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (+0.00%) closed at 1,887.88, 1,158.02, and 1,042.01 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 2.80%, followed by Fuel & Power (+0.41%), Engineering (+0.38%), Pharmaceutical (+0.27%), Food & Allied (-0.09%), Telecommunication (-0.19%), and Bank (-0.75%), respectively. Block trades contributed 3.5% of the overall market turnover. Shinepukur Ceramics Limited (+2.0%) was the most traded share with a turnover of BDT 204 million.



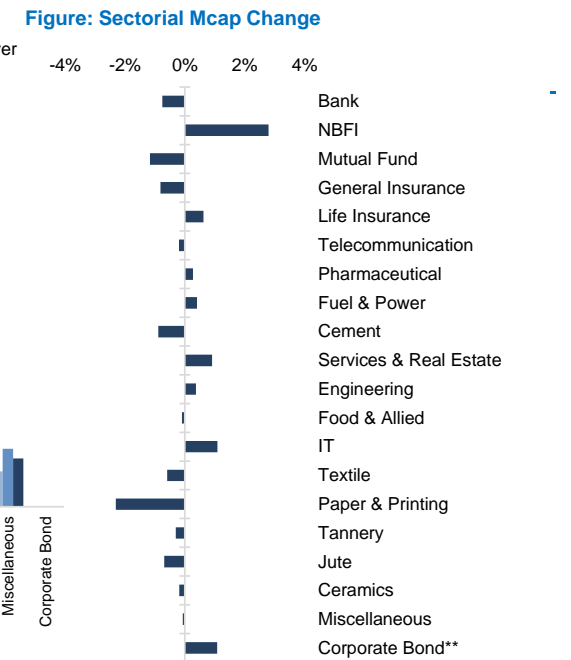
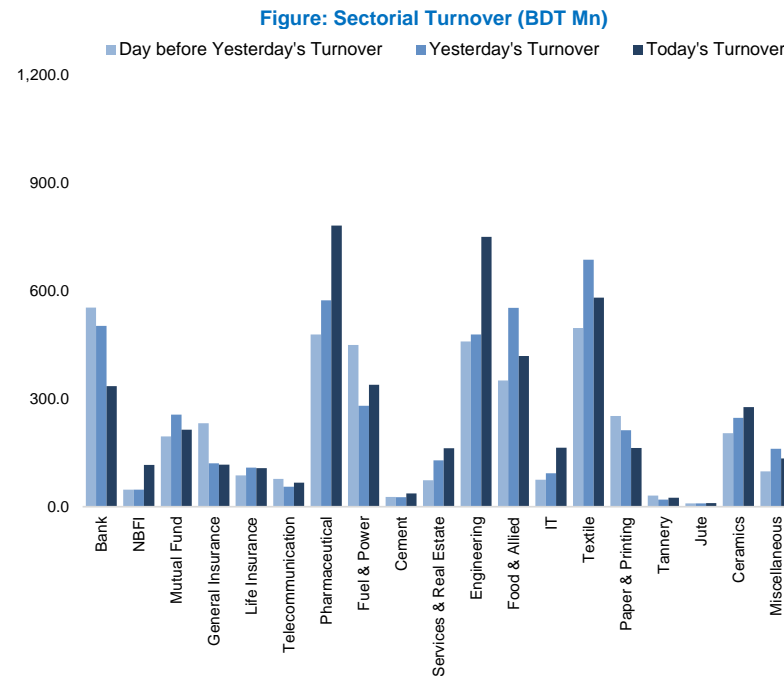
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,201.70	5,207.36	-5.66	-0.11%	-0.3%
DS30	1,887.88	1,881.43	+6.45	+0.34%	-2.7%
DSES	1,158.02	1,158.21	-0.19	-0.02%	-0.9%
CDSET	1,042.01	1,041.96	+0.05	+0.00%	-2.3%

	Advanced	Declined	Unchanged	Total
All Category	138	199	60	397
A Category (Equity)	67	125	28	220
B Category (Equity)	37	40	5	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	34	34	27	95
Mutual Funds	6	20	10	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,715,178	6,734,528	-0.3%
	Mn USD	55,042	55,201	
Turnover	Mn BDT	4,971	4,825	+3.0%
	Mn USD	41	40	
Volume	Mn Shares	215	226	-5.1%
No. of Trade		152,733	142,565	+7.1%

\* Average Interbank Exchange Rate is BDT 122.00 as of Mar 20, 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	1,428	1,438	-10.77	-0.75%	36	675,442	10.1%	335.1	7.0%	8.6x	0.7x	GP	431,556	12.3%	35.5	11.9x	6.7x
NBFI	1,081	1,052	+29.40	+2.80%	23	103,022	1.5%	115.8	2.4%	NM	NM	SQURPHARMA	195,108	5.5%	93.3	8.7x	1.5x
Mutual Fund	609	616	-7.16	-1.16%	37	27,978	0.4%	214.1	4.5%	NM	0.5x	BATBC	175,068	5.0%	9.9	10.0x	3.0x
General Insurance	2,577	2,598	-21.14	-0.81%	43	73,553	1.1%	117.1	2.4%	13.1x	1.1x	WALTONHIL	140,256	4.0%	11.0	10.6x	1.3x
Life Insurance	1,778	1,767	+11.01	+0.62%	15	47,300	0.7%	107.5	2.2%	NM	NM	ROBI	136,186	3.9%	28.1	19.4x	2.0x
Telecommunication	5,040	5,050	-9.77	-0.19%	3	591,010	8.8%	66.9	1.4%	13.2x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,903	2,895	+7.85	+0.27%	34	550,365	8.2%	780.5	16.3%	13.3x	1.5x	BRACBANK	91,140	2.6%	24.3	8.2x	1.2x
Fuel & Power	1,086	1,081	+4.46	+0.41%	23	287,643	4.3%	338.6	7.1%	15.5x	0.6x	BERGERPBL	82,404	2.3%	1.6	24.0x	5.7x
Cement	1,772	1,788	-15.84	-0.89%	7	84,446	1.3%	37.2	0.8%	17.0x	1.9x	MARICO	75,052	2.1%	1.7	13.4x	9.9x
Services & Real Estate	1,022	1,012	+9.23	+0.91%	9	56,187	0.8%	162.4	3.4%	19.9x	0.4x	ISLAMIBANK	69,713	2.0%	10.1	14.9x	1.0x
Engineering	2,482	2,473	+9.31	+0.38%	42	279,989	4.2%	749.3	15.6%	12.7x	0.9x	RENATA	57,738	1.6%	6.9	19.5x	1.7x
Food & Allied	15,753	15,768	-14.59	-0.09%	21	288,245	4.3%	418.5	8.7%	15.7x	4.3x	LHB	53,075	1.5%	18.4	13.9x	2.9x
IT	1,983	1,961	+21.41	+1.09%	11	26,154	0.4%	163.7	3.4%	20.3x	1.7x	UNILEVERCL	47,517	1.3%	0.1	71.2x	19.4x
Textile	1,144	1,151	-6.78	-0.59%	58	119,148	1.8%	580.4	12.1%	81.0x	0.8x	ICB	45,184	1.3%	15.9	35.6x	1.0x
Paper & Printing	4,724	4,836	-111.57	-2.31%	6	21,344	0.3%	163.3	3.4%	NM	1.0x	DUTCHBANGL	44,732	1.3%	1.6	7.2x	0.9x
Tannery	1,951	1,957	-5.92	-0.30%	6	21,739	0.3%	25.2	0.5%	NM	1.6x	BXPHARMA	38,901	1.1%	127.3	6.1x	0.8x
Jute	12,117	12,201	-83.91	-0.69%	3	2,667	0.0%	9.7	0.2%	NM	NM	EBL	35,312	1.0%	17.7	5.4x	0.8x
Ceramics	428	429	-0.80	-0.19%	5	19,202	0.3%	276.5	5.8%	NM	1.2x	PUBALIBANK	33,664	1.0%	5.3	3.5x	0.6x
Miscellaneous	4,240	4,242	-2.73	-0.06%	15	230,222	3.4%	134.1	2.8%	94.2x	1.9x	POWERGRID	33,171	0.9%	4.4	NM	0.3x
Corporate Bond**	15,023	14,863	+160.25	+1.08%	16	32,903	0.5%	0.2	0.0%	NM	NM	CITYBANK	30,695	0.9%	16.2	4.3x	0.8x
Treasury Bond**	1,655	1,645	+10.05	+0.61%	234	3,176,149	47.3%	0.6	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
MIDASFIN	9.4	+9.3%	9.2	NM	2.5x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	SPCERAMICS	25.2	+2.0%	204.3	NM	0.8x
DBH1STMF	4.8	+9.1%	7.6	NM	0.5x	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	ACMEPL	16.0	+6.7%	156.7	NM	0.9x
PADMALIFE	23.9	+8.6%	6.6	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	BXPHARMA	87.2	+5.1%	127.3	6.1x	0.8x
PROGRESLIF	62.3	+7.8%	7.2	NM	NM	BATBC	50,233	3.6%	10.0x	3.0x	ORIONINFU	390.7	-2.6%	122.9	NM	25.5x
SAPORTL	23.5	+6.8%	64.5	10.0x	0.7x	WALTONHIL	46,773	3.3%	10.6x	1.3x	INTRACO	24.9	-1.6%	121.8	25.4x	1.9x
ACMEPL	16.0	+6.67%	156.7	NM	0.9x	BRACBANK	46,489	3.3%	8.2x	1.2x	AIL	56.7	-4.7%	104.0	21.3x	2.4x
SUMITPOWER	15.7	+6.1%	29.1	5.0x	0x	GP	44,708	3.2%	11.9x	6.7x	SQURPHARMA	220.1	-0.1%	93.3	8.7x	1.5x
EASTRNLUB	1,800.9	+5.6%	57.1	51.3x	8.6x	RENATA	32,968	2.3%	19.5x	1.7x	SALAMCRST	31.5	+4.0%	83.2	NM	1.7x
ABB1STMF	3.8	+5.6%	28.7	NM	0.4x	BXPHARMA	23,409	1.7%	6.1x	0.8x	FUWANGFOOL	17.4	-3.3%	76.8	NM	8.3x
BXPHARMA	87.2	+5.1%	127.3	6.1x	0.8x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	GHAIL	15.1	-0.7%	75.5	NM	1.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	OLYMPIC	ALARBANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UCB	12.1	-6.9%	18.3	4.4x	0.4x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	KBPPWBIL	157.0	150.0	2.0	255	39.98
SHARPIND	20.8	-5.9%	13.2	32.0x	2x	15.5%	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	AL-HAJTEX	152.3	150.0	10.0	186	28.07
EBL1STMF	6.6	-5.7%	8.4	NM	0.7x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	MARICO	2,400.0	2,400.0	1.0	10	24.00
PARAMOUNT	39.0	-5.3%	13.4	17.5x	1.4x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	BEACHHATCH	122.8	105.7	4.0	119	13.51
EBLNRBMF	3.6	-5.3%	3.0	NM	0.4x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	FINEFOODS	188.0	185.0	4.0	70	13.00
BPML	41.9	-5.2%	49.7	NM	0.6x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	LOVELLO	82.0	76.0	3.0	141	11.06
HAKKANIPUL	67.6	-4.8%	57.7	NM	2.8x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	TOSRIFA	23.9	23.9	1.0	325	7.77
AIL	56.7	-4.7%	104.0	21.3x	2.4x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	PREMIERCEM	51.1	50.5	4.0	125	6.34
ZEALBANGLA	86.1	-4.4%	0.2	NM	NM	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	RELIANCE1	20.5	18.7	6.0	305	6.07
CAPITECGBF	7.2	-4.0%	5.2	NM	0.7x	13.9x	15.8x	15.0x	50.1x	3.7x	19.4x	8.4x	NM	5.0x	PROVATIINS	35.8	35.8	1.0	125	4.49

\* 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
KBPPWBIL	157.0	150.0	40.0	255	2
AL-HAJTEX	152.3	150.0	28.1	186	10
MARICO	2,400.0	2,400.0	24.0	10	1
BEACHHATCH	122.8	105.7	13.5	119	4
FINEFOODS	188.0	185.0	13.0	70	4
LOVELLO	82.0	76.0	11.1	141	3
TOSRIFA	23.9	23.9	7.8	325	1
PREMIERCEM	51.1	50.5	6.3	125	4
RELIANCE1	20.5	18.7	6.1	305	6
PROVATIINS	35.8	35.8	4.5	125	1
INTRACO	27.8	27.8	2.8	100	1
KDSALTD	39.0	39.0	2.0	50	1
FUWANGFOOD	18.1	18.1	1.8	100	1
HAMI	108.0	108.0	1.8	16	1
EASTRNLAB	1,605.0	1,605.0	1.3	1	1
BEACONPHAR	127.1	127.1	1.3	10	1
ORIONPHARM	27.9	27.9	1.1	40	1
IPDC	17.5	17.5	0.9	50	1
IFIC	7.6	7.6	0.8	100	1
GP	292.0	292.0	0.7	3	1
EBL1STMF	7.0	7.0	0.7	100	1
LRBDL	13.8	13.8	0.7	50	1
<b>Total</b>			<b>174.4</b>		<b>56</b>

**Important DSE News**

**PARAMOUNT**

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 27.05.2025, Time: 11:00 AM, Venue: Hybrid System, Presence at Emmanuelle's Party Center, House 08, Road 135, Gulshan 01, Dhaka 1212. Link of AGM: <https://agmbd.live/paramount2025>. Record Date: 22.04.2025. The Company has also reported EPS of Tk. 2.23, NAV per share of Tk. 27.26 and NOCFPS of Tk. 2.91 for the year ended December 31, 2024 as against Tk. 1.73, Tk. 26.56 and Tk. 1.54 respectively for the year ended December 31, 2023.

**NCCBANK**

Refer to their earlier news disseminated by DSE on 20.11.2024 regarding holding of AGM, the company has further informed that Bangladesh Bank has accorded their approval against Agenda items bearing No. 01-03 for amendments of Articles i.e. Article 91, 94(1) and 94(2) of the Articles of Association of the company which were duly passed in the EGM held on January 07, 2025

**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
PARAMOUNT		0.0%	10.0%	Record Date	22-Apr-25

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