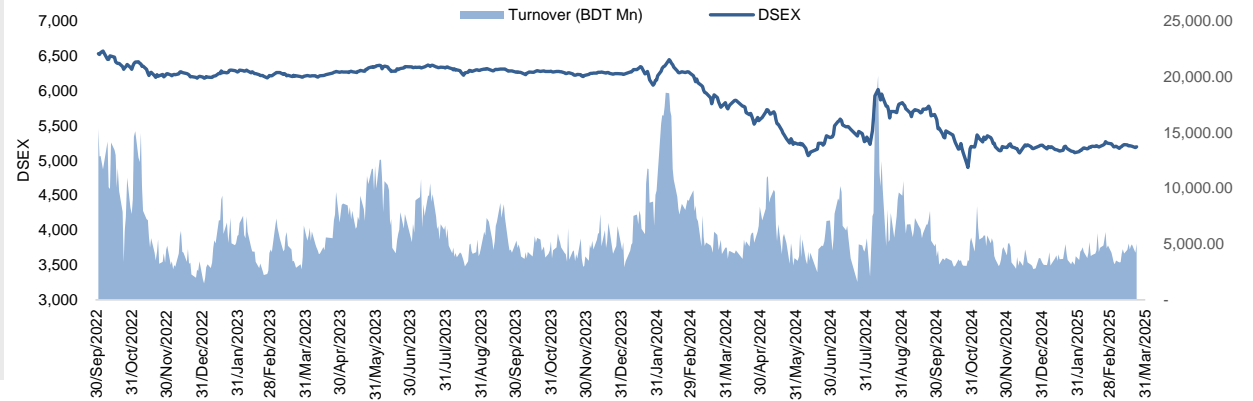


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.26%) gained 13.53 points and closed at 5,196.89. The blue-chip index DS30 (+0.81%), the Shariah-based index DSES (+0.65%), and the large-cap index CDSET (+0.42%) closed at 1,911.56, 1,166.29, and 1,047.06 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 1.08%, followed by Fuel & Power (+0.35%), Bank (+0.12%), Food & Allied (+0.05%), Engineering (-0.03%), NBFI (-0.17%), and Telecommunication (-0.42%), respectively. Block trades contributed 9.1% of the overall market turnover. Orion Infusion Ltd. (+7.3%) was the most traded share with a turnover of BDT 336 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,196.89	5,183.36	+13.53	+0.26%	-0.4%
DS30	1,911.56	1,896.23	+15.33	+0.81%	-1.5%
DSES	1,166.29	1,158.77	+7.52	+0.65%	-0.2%
CDSET	1,047.06	1,042.65	+4.41	+0.42%	-1.8%

	Advanced	Declined	Unchanged	Total
All Category	172	151	73	396
A Category (Equity)	108	75	36	219
B Category (Equity)	24	47	11	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	40	29	26	95
Mutual Funds	9	12	14	35
Corporate Bonds	2	0	0	2
Treasury Bonds	1	1	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,734,595	6,699,328	+0.5%
	Mn USD	55,202	54,913	
Turnover	Mn BDT	5,043	4,213	+19.7%
	Mn USD	41	35	
Volume	Mn Shares	149	163	-8.3%
No. of Trade		126,847	127,724	-0.7%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 24, 2025

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Figure: Sectorial Turnover (BDT Mn)

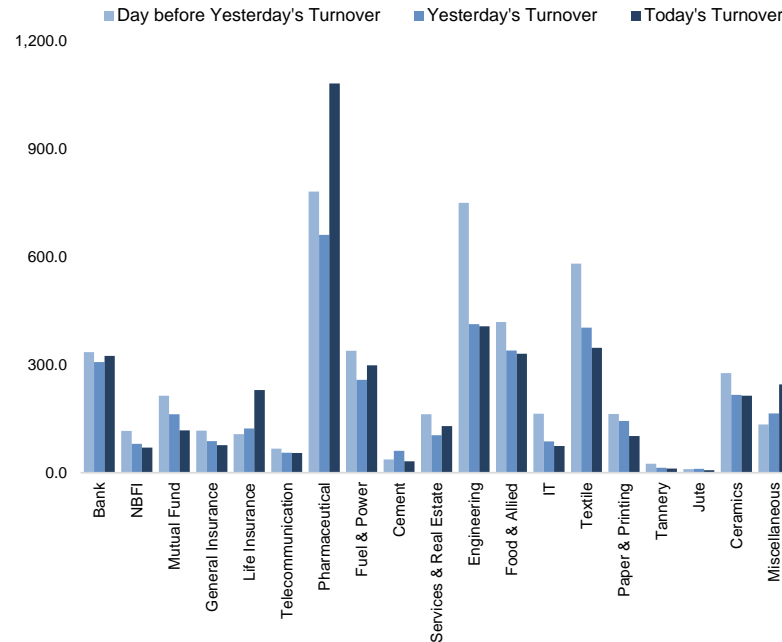
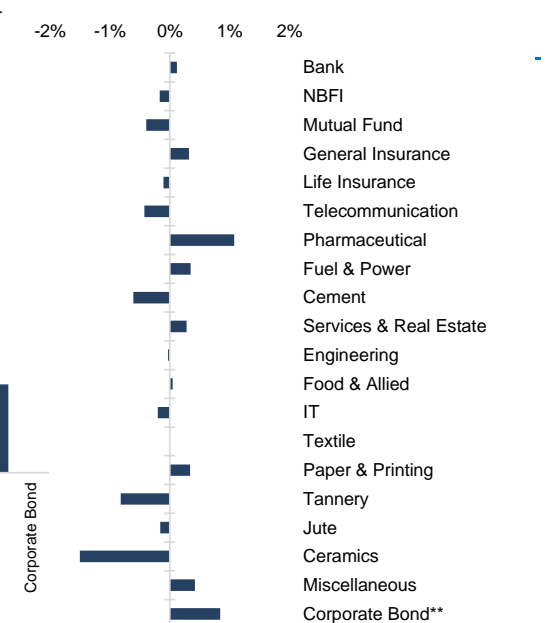


Figure: Sectorial Mcap Change



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	1,420	1,418	+1.69	+0.12%	36	671,664	10.0%	324.7	7.1%	8.5x	0.7x	GP	429,936	12.2%	22.1	11.8x	6.6x
NBFI	1,064	1,066	-1.79	-0.17%	23	101,418	1.5%	70.1	1.5%	NM	NM	SQRPHARMA	195,019	5.5%	123.3	8.7x	1.5x
Mutual Fund	604	607	-2.40	-0.39%	37	27,774	0.4%	117.3	2.6%	NM	0.5x	BATBC	174,960	5.0%	18.3	10.0x	3.0x
General Insurance	2,569	2,560	+8.20	+0.32%	43	73,329	1.1%	76.7	1.7%	13.0x	1.1x	WALTONHIL	139,559	4.0%	2.2	10.6x	1.3x
Life Insurance	1,769	1,771	-1.86	-0.11%	15	47,050	0.7%	229.5	5.0%	NM	NM	ROBI	134,091	3.8%	24.8	19.1x	2.0x
Telecommunication	5,006	5,027	-21.26	-0.42%	3	586,976	8.8%	54.6	1.2%	13.2x	3.9x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,945	2,914	+31.33	+1.08%	34	558,332	8.3%	1,080.9	23.6%	13.5x	1.6x	BRACBANK	89,724	2.6%	16.1	8.1x	1.2x
Fuel & Power	1,077	1,074	+3.75	+0.35%	23	285,387	4.3%	298.5	6.5%	15.9x	0.6x	BERGERPBL	83,137	2.4%	1.3	24.2x	5.7x
Cement	1,779	1,789	-10.93	-0.61%	7	84,756	1.3%	31.7	0.7%	17.0x	1.9x	MARICO	75,342	2.1%	2.9	13.5x	9.9x
Services & Real Estate	1,023	1,020	+2.88	+0.28%	9	56,282	0.8%	129.5	2.8%	20.0x	0.4x	ISLAMIBANK	70,679	2.0%	9.6	15.1x	1.0x
Engineering	2,464	2,465	-0.67	-0.03%	42	277,991	4.2%	406.4	8.9%	12.6x	0.9x	RENATA	57,555	1.6%	3.9	19.5x	1.7x
Food & Allied	15,782	15,774	+7.59	+0.05%	21	288,767	4.3%	330.3	7.2%	15.8x	4.3x	LHB	53,075	1.5%	18.8	13.9x	2.9x
IT	1,960	1,964	-3.97	-0.20%	11	25,852	0.4%	74.2	1.6%	20.1x	1.7x	UNILEVERCL	48,217	1.4%	0.9	72.3x	19.7x
Textile	1,131	1,131	-0.05	-0.00%	58	117,741	1.8%	347.0	7.6%	80.0x	0.8x	BXPHARMA	45,459	1.3%	314.1	7.1x	0.9x
Paper & Printing	4,633	4,617	+15.61	+0.34%	6	20,930	0.3%	102.0	2.2%	NM	1.0x	ICB	44,490	1.3%	4.6	35.1x	1.0x
Tannery	1,935	1,951	-15.98	-0.82%	6	21,558	0.3%	11.2	0.2%	NM	1.6x	DUTCHBANGL	44,029	1.3%	0.8	7.0x	0.9x
Jute	11,902	11,920	-18.80	-0.16%	3	2,620	0.0%	7.1	0.2%	NM	NM	EBL	35,312	1.0%	42.5	5.4x	0.8x
Ceramics	421	427	-6.42	-1.50%	5	18,873	0.3%	214.3	4.7%	NM	1.2x	PUBALIBANK	33,664	1.0%	11.5	3.5x	0.6x
Miscellaneous	4,259	4,241	+17.88	+0.42%	15	231,296	3.5%	245.2	5.3%	94.6x	1.9x	POWERGRID	32,714	0.9%	4.0	NM	0.3x
Corporate Bond**	15,019	14,894	+125.56	+0.84%	16	32,895	0.5%	1.9	0.0%	NM	NM	CITYBANK	30,424	0.9%	33.1	4.3x	0.8x
Treasury Bond**	1,685	1,672	+12.81	+0.77%	234	3,161,433	47.2%	433.0	9.4%	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
NAVANAPHAR	52.4	+7.6%	46.2	13.3x	1.2x	SQRPHARMA	108,958	7.7%	8.7x	1.5x	ORIONINFU	414.4	+7.3%	335.6	NM	27.0x
BXPHARMA	101.9	+7.4%	314.1	7.1x	0.9x	ISLAMIBANK	74,730	5.3%	15.1x	1.0x	BXPHARMA	101.9	+7.4%	314.1	7.1x	0.9x
ORIONINFU	414.4	+7.3%	335.6	NM	27.0x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	25.1	-5.3%	165.2	NM	0.8x
DOREENPWR	21.8	+6.9%	6.7	22.0x	0.4x	BATBC	50,233	3.6%	10.0x	3.0x	BSC	88.1	+2.9%	126.0	4.6x	0.9x
AIL	57.1	+6.5%	90.0	21.4x	2.5x	WALTONHIL	46,773	3.3%	10.6x	1.3x	SQRPHARMA	220.0	+0.2%	123.3	8.7x	1.5x
MIDASFIN	10.9	+5.83%	16.1	NM	2.9x	BRACBANK	46,489	3.3%	8.1x	1.2x	BEACHHATCH	119.0	+5.7%	120.9	34.9x	7.8x
BEACHHATCH	119.0	+5.7%	120.9	34.9x	8x	GP	44,708	3.2%	11.8x	6.6x	SUNLIFEINS	68.6	+5.1%	112.9	NM	NM
SHYAMPSUG	132.1	+5.7%	2.6	NM	NM	RENATA	32,968	2.3%	19.5x	1.7x	EASTRNLU	1,995.2	+4.3%	106.7	56.9x	9.6x
HRTEX	38.1	+5.2%	10.0	NM	2.0x	BXPHARMA	23,409	1.7%	7.1x	0.9x	KDSALTD	46.0	+2.7%	90.4	21.1x	1.7x
SUNLIFEINS	68.6	+5.1%	112.9	NM	NM	PUBALIBANK	22,905	1.6%	3.5x	0.6x	AIL	57.1	+6.5%	90.0	21.4x	2.5x

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	28.3	-9.3%	60.0	NM	1.5x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	ORIONINFU	405.0	380.1	22.0	656	253.01
DBH1STMF	4.6	-6.1%	3.0	NM	1x	15.8x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	SUNLIFEINS	66.9	59.1	12.0	564	35.30
SPCERAMICS	25.1	-5.3%	165.2	NM	0.8x	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	BEACHHATCH	113.0	112.0	13.0	187	20.95
PROGRESLIF	63.3	-5.0%	8.5	NM	NM	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	BEACONPHAR	136.1	136.1	2.0	151	20.50
FAREASTLIF	32.8	-4.7%	2.5	NM	NM	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	SEMILLECMF	7.7	7.6	2.0	2,500	19.10
UCB	11.1	-4.3%	10.5	4.4x	0.4x	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	MARICO	2,415.0	2,415.0	2.0	6	14.72
GHAIL	14.1	-4.1%	28.4	NM	1.1x	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	LOVELLO	89.6	80.0	5.0	153	13.03
CROWNCEMNT	51.6	-3.9%	3.4	14.7x	0.9x	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	KDSALTD	47.0	43.9	4.0	231	10.78
EBL1STMF	5.8	-3.3%	8.2	NM	0.6x	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	SIMTEX	20.0	20.0	1.0	490	9.80
NORTHERN	103.6	-3.3%	0.1	NM	1.3x	13.9x	15.8x	15.3x	50.5x	3.7x	19.1x	8.3x	NM	5.1x	PEOPLESINS	31.0	31.0	1.0	239	7.40

* 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
ORIONINFU	405.0	380.1	253.0	656	22
SUNLIFEINS	66.9	59.1	35.3	564	12
BEACHHATCH	113.0	112.0	21.0	187	13
BEACONPHAR	136.1	136.1	20.5	151	2
SEMLLECMF	7.7	7.6	19.1	2,500	2
MARICO	2,415.0	2,415.0	14.7	6	2
LOVELLO	89.6	80.0	13.0	153	5
KDSALTD	47.0	43.9	10.8	231	4
SIMTEX	20.0	20.0	9.8	490	1
PEOPLESINS	31.0	31.0	7.4	239	1
RELIANCE1	21.5	19.3	7.4	353	2
AL-HAJTEX	160.5	145.0	7.1	47	5
ABB1STMF	4.3	4.3	5.6	1,300	2
ASIATICLAB	38.9	37.4	4.4	114	2
KBPPWBIL	163.0	143.0	3.6	23	2
JAMUNAOIL	175.5	175.5	3.4	20	2
NLTUBES	80.4	80.4	3.3	41	2
MIDLANDBNK	15.8	15.8	2.8	180	1
BGIC	36.0	36.0	2.3	64	2
HAMI	114.0	113.0	1.8	16	2
QUASEMIND	32.0	32.0	1.6	50	1
EASTRNLUB	1,820.0	1,801.0	1.4	1	2
Total			456.6		99

Important DSE News

NRBBANK

The company has informed that the Board of Directors has elected Mr. Iqbal Ahmed OBE DBA as the Chairman of the company.

PTL

The Board of Directors of the company has decided to invest 2,89,99,999 (Two Crore & eighty-nine Lac ninety-nine thousand nine hundred & ninety-nine) ordinary shares of Paramount Solar Limited at face value Tk.10/- each in the name of Paramount Textile PLC. as portfolio diversification and after the new allotment the total investment/holding will be 99.99% i.e. 2,99,99,999 ordinary shares of the company.

FUWANGFOOD

In response to a DSE query letter to the company regarding a news published in a newspaper titled "Fu-Wang Foods workers not getting paid, highway blockade (translated from Bengali to English)" on March 18, 2025, the company has submitted clarification vide its letter dated March 23, 2025.

PADMALIFE

The company has informed that the Board of Directors of the company in its Meeting held on 20 January 2025 decided to sell the property (land) described in the below in order to settle the due claims. The Insurance Development and Regulatory Authority in its letter dated 12 March 2025 approved this decision of the Board of Directors of Padma Islami Life Insurance Ltd. Location: District- Cumilla, Police Station- Sadar, Mouza- Batabaria. Schedule: C.S. Khatian no-4, S.A. Khatian no-9, B.R.S Khatian no-59, C.S & S.A Plot no-50/4, B.R.S plot no- 440, total are of land 20 decimals. Selling Price: 190,00,000/-.

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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