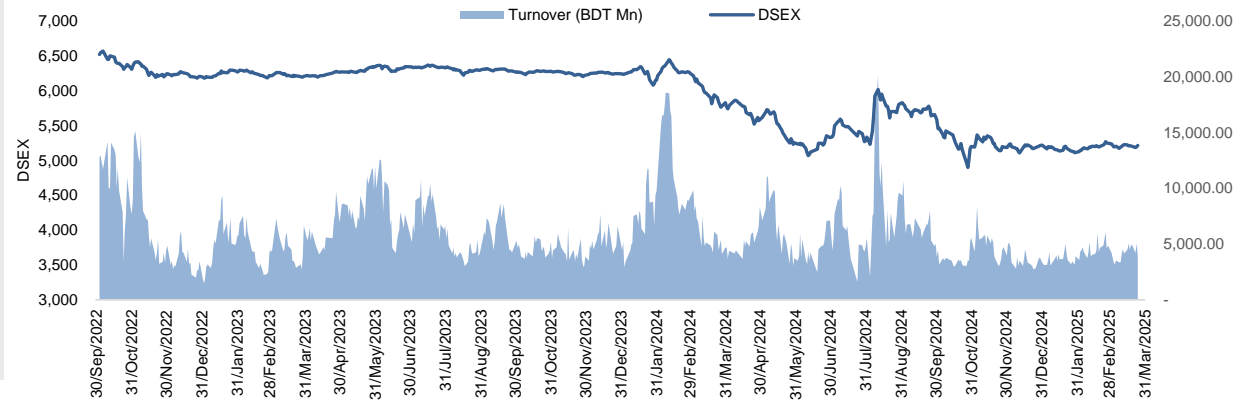


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.33%) gained 17.32 points and closed at 5,214.21. The blue-chip index DS30 (+0.34%), the Shariah-based index DSES (+0.15%), and the large-cap index CDSET (+0.13%) closed at 1,918.06, 1,168.03, and 1,048.38 points, respectively. All of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 3.41% followed by Telecommunication (+0.64%), Fuel & Power (+0.49%), Bank (+0.37%), Engineering (+0.35%), Food & Allied (+0.10%), and Pharmaceutical (+0.03%), respectively. Block trades contributed 5.7% of the overall market turnover. Orion Infusion Ltd. (-4.7%) was the most traded share with a turnover of BDT 217 million.



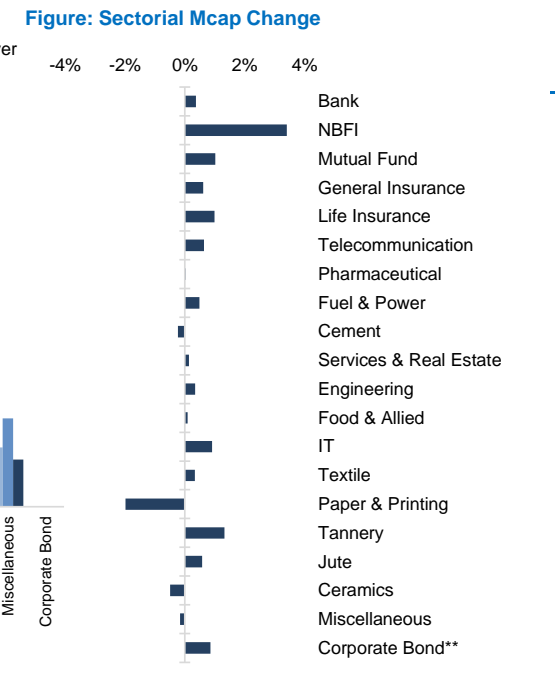
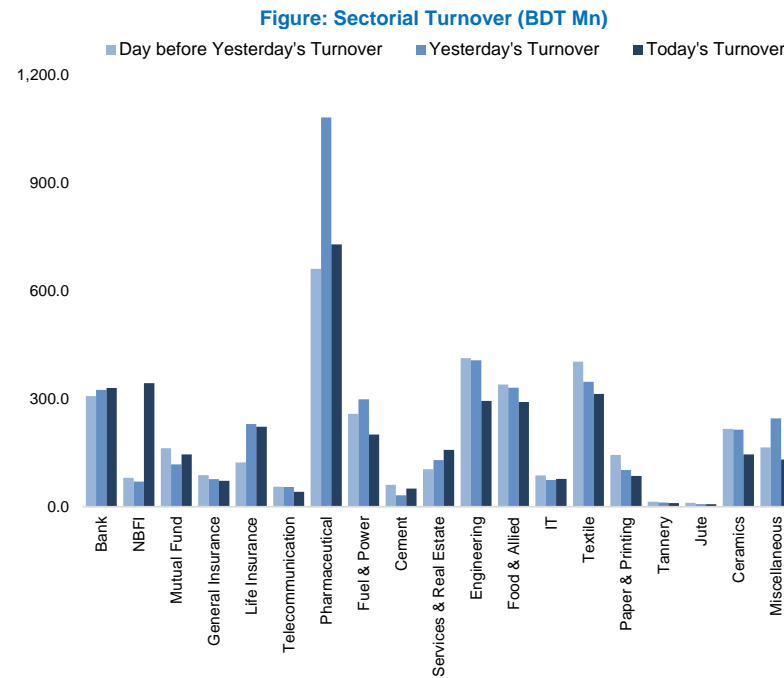
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,214.21	5,196.89	+17.32	+0.33%	-0.0%
DS30	1,918.06	1,911.56	+6.50	+0.34%	-1.1%
DSES	1,168.03	1,166.29	+1.75	+0.15%	-0.1%
CDSET	1,048.38	1,047.06	+1.32	+0.13%	-1.7%

	Advanced	Declined	Unchanged	Total
All Category	220	97	80	397
A Category (Equity)	125	55	41	221
B Category (Equity)	42	24	16	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	53	18	23	94
Mutual Funds	15	3	18	36
Corporate Bonds	1	1	3	5
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,761,820	6,734,595	+0.4%
Mn USD	55,425	55,202	
Turnover			
Mn BDT	3,865	5,043	-23.4%
Mn USD	32	41	
Volume			
Mn Shares	145	149	-3.2%
No. of Trade	116,170	126,847	-8.4%

* Based on Traded Scrips

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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	1,425	1,420	+5.26	+0.37%	36	674,155	10.0%	329.7	9.0%	8.5x	0.7x	GP	431,421	12.2%	16.5	11.9x	6.7x
NBFI	1,101	1,064	+36.26	+3.41%	23	104,873	1.6%	343.4	9.4%	NM	NM	SQURPHARMA	194,753	5.5%	86.4	8.7x	1.5x
Mutual Fund	610	604	+6.14	+1.02%	37	28,056	0.4%	145.3	4.0%	NM	0.5x	BATBC	174,906	5.0%	16.4	10.0x	3.0x
General Insurance	2,584	2,569	+15.73	+0.61%	43	73,778	1.1%	72.1	2.0%	13.1x	1.1x	WALTONHIL	140,286	4.0%	1.7	10.6x	1.3x
Life Insurance	1,787	1,769	+17.62	+1.00%	15	47,519	0.7%	222.2	6.1%	NM	NM	ROBI	136,186	3.9%	20.3	19.4x	2.0x
Telecommunication	5,038	5,006	+31.97	+0.64%	3	590,725	8.8%	41.3	1.1%	13.2x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,946	2,945	+0.74	+0.03%	34	558,472	8.3%	728.2	20.0%	13.5x	1.6x	BRACBANK	89,724	2.5%	13.0	8.1x	1.2x
Fuel & Power	1,083	1,077	+5.24	+0.49%	23	286,775	4.3%	200.2	5.5%	16.0x	0.6x	BERGERPBL	82,928	2.3%	0.8	24.2x	5.7x
Cement	1,774	1,779	-4.13	-0.23%	7	84,560	1.3%	50.1	1.4%	17.0x	1.9x	MARICO	76,176	2.2%	5.5	13.6x	10.0x
Services & Real Estate	1,025	1,023	+1.43	+0.14%	9	56,361	0.8%	158.0	4.3%	20.0x	0.4x	ISLAMIBANK	70,840	2.0%	11.5	15.2x	1.0x
Engineering	2,473	2,464	+8.52	+0.35%	42	278,953	4.2%	293.8	8.1%	12.7x	0.9x	RENATA	57,566	1.6%	8.1	19.5x	1.7x
Food & Allied	15,797	15,782	+15.36	+0.10%	21	289,048	4.3%	290.7	8.0%	15.8x	4.3x	LHB	52,842	1.5%	22.4	13.8x	2.8x
IT	1,978	1,960	+17.94	+0.92%	11	26,089	0.4%	77.0	2.1%	20.2x	1.7x	UNILEVERCL	47,939	1.4%	0.4	71.8x	19.6x
Textile	1,134	1,131	+3.80	+0.34%	58	118,137	1.8%	313.0	8.6%	80.3x	0.8x	BXPHARMA	45,325	1.3%	193.8	7.1x	0.9x
Paper & Printing	4,541	4,633	-91.92	-1.98%	6	20,515	0.3%	85.8	2.4%	NM	0.9x	ICB	45,011	1.3%	21.8	35.5x	1.0x
Tannery	1,960	1,935	+25.65	+1.33%	6	21,844	0.3%	10.2	0.3%	NM	1.6x	DUTCHBANGL	44,644	1.3%	0.5	7.1x	0.9x
Jute	11,971	11,902	+69.46	+0.58%	3	2,635	0.0%	6.9	0.2%	NM	NM	EBL	35,991	1.0%	56.8	5.5x	0.8x
Ceramics	419	421	-2.04	-0.49%	5	18,782	0.3%	145.0	4.0%	NM	1.2x	PUBALIBANK	33,432	0.9%	4.4	3.5x	0.6x
Miscellaneous	4,253	4,259	-6.67	-0.16%	15	230,934	3.4%	131.2	3.6%	95.0x	1.9x	POWERGRID	32,897	0.9%	1.5	NM	0.3x
Corporate Bond**	15,147	15,019	+128.29	+0.85%	16	33,176	0.5%	0.6	0.0%	NM	NM	CITYBANK	30,965	0.9%	19.6	4.3x	0.8x
Treasury Bond**	1,710	1,685	+25.29	+1.50%	234	3,173,370	47.2%	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
LANKABAFIN	18.7	+10.0%	154.0	19.3x	1.0x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	ORIONINFU	395.1	-4.7%	217.1	NM	25.8x
ISLAMICFIN	11.8	+9.3%	27.7	NM	2.7x	ISLAMIBANK	74,730	5.3%	15.2x	1.0x	BXPHARMA	101.6	-0.3%	193.8	7.1x	0.9x
FASFIN	3.6	+9.1%	1.1	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	LANKABAFIN	18.7	+10.0%	154.0	19.3x	1.0x
PREMIERLEA	3.7	+8.8%	0.1	NM	NM	BATBC	50,233	3.6%	10.0x	3.0x	SPCERAMICS	23.9	-4.8%	108.6	NM	0.8x
EBL1STMF	6.3	+8.6%	4.8	NM	0.7x	WALTONHIL	46,773	3.3%	10.6x	1.3x	SEAPEARL	41.1	+6.5%	96.0	NM	2.4x
FIRSTFIN	3.9	+8.33%	1.8	NM	NM	BRACBANK	46,489	3.3%	8.1x	1.2x	BEACHHATCH	121.4	+2.0%	89.3	35.6x	8.0x
BDFINANCE	13.1	+7.4%	27.4	NM	1x	GP	44,708	3.2%	11.9x	6.7x	SQURPHARMA	219.7	-0.1%	86.4	8.7x	1.5x
SEAPEARL	41.1	+6.5%	96.0	NM	2.4x	RENATA	32,968	2.3%	19.5x	1.7x	UTTARABANK	25.6	-	80.8	8.4x	0.8x
ILFSL	3.7	+5.7%	0.1	NM	NM	BXPHARMA	23,409	1.7%	7.1x	0.9x	SUNLIFEINS	70.3	+2.5%	74.2	NM	NM
UTTARAFIN	15.2	+5.6%	0.5	NM	0.2x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	INTRACO	23.8	+1.3%	66.7	24.3x	1.9x

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)
PADMALIFE	23.8	-4.8%	2.3	NM	NM	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	ORIONINFU	420.0	390.0	10.0	197	77.62
SPCERAMICS	23.9	-4.8%	108.6	NM	1x	15.5%	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	EBL	26.4	26.4	1.0	1,697	44.81
ORIONINFU	395.1	-4.7%	217.1	NM	25.8x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	LOVELLO	82.1	79.0	9.0	153	12.35
BPML	39.2	-4.6%	25.2	NM	0.6x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	BEACHHATCH	121.0	115.0	7.0	92	10.90
NFML	8.8	-4.3%	1.7	NM	0.8x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	AL-HAJTEX	145.0	145.0	6.0	58	8.47
EASTRNLU	1,913.5	-4.1%	45.8	54.6x	9.2x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	RELIANCE1	22.1	19.2	7.0	398	8.45
CROWNCEMNT	49.5	-4.1%	3.0	14.1x	0.9x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	SUNLIFEINS	69.0	68.6	2.0	111	7.62
AIL	54.8	-4.0%	51.0	20.6x	2.4x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	SILCOPHL	14.7	14.7	2.0	500	7.35
MEGCONMILK	24.2	-4.0%	0.1	NM	NM	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	FINEFOODS	191.5	185.5	2.0	38	7.23
SALAMCRST	27.3	-3.5%	33.5	NM	1.5x	13.8x	16.0x	15.2x	50.0x	3.7x	19.4x	8.4x	NM	5.1x	ASIATICLAB	39.3	39.3	1.0	100	3.93

* 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	420.0	390.0	77.6	197	10
EBL	26.4	26.4	44.8	1,697	1
LOVELLO	82.1	79.0	12.3	153	9
BEACHHATCH	121.0	115.0	10.9	92	7
AL-HAJTEX	145.0	145.0	8.5	58	6
RELIANCE1	22.1	19.2	8.5	398	7
SUNLIFEINS	69.0	68.6	7.6	111	2
SILCOPHL	14.7	14.7	7.4	500	2
FINEFOODS	191.5	185.5	7.2	38	2
ASIATICLAB	39.3	39.3	3.9	100	1
KBPPWBIL	163.0	150.0	3.5	23	2
OIMEX	27.4	27.4	2.7	100	1
KDSALTD	45.8	44.5	2.4	53	2
ABB1STMF	4.5	4.5	2.3	500	1
AMANFEED	26.5	26.5	2.2	83	1
TECHNODRUG	32.9	32.9	2.1	63	1
BEXIMCO	100.1	99.1	1.6	16	3
PREMIERCEM	53.0	53.0	1.6	30	1
SPCERAMICS	26.4	26.4	1.6	60	1
BSC	96.2	96.2	1.3	14	1
VFSTDLD	9.3	9.3	1.3	135	1
TOSRIFA	22.9	22.9	1.1	50	1
Total			220.2		75

Important DSE News

EBL

The Board of Directors has recommended 17.50% Cash Dividend and 17.50% stock dividend for the year ended December 31, 2024. Date of AGM: 21-May-2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 23-Apr-2025. The Company has also reported Consolidated EPS of Tk. 4.86, Consolidated NAV per share of Tk. 31.63 and Consolidated NOCFPS of Tk. 17.74 for the year ended 31-Dec-2024 as against Tk. 4.51 (restated), Tk. 28.16 (restated) and Tk. 6.95 (restated) respectively for the year ended 31-Dec-2023.

NFML

(Q1 Un-audited): EPS was Tk. (0.24) for July-September 2024 as against Tk. (0.09) for July-September 2023; NOCFPS was Tk. 0.01 for July-September 2024 as against Tk. 0.10 for July-September 2023. NAV per share was Tk. 10.83 as on September 30, 2024 and Tk. 11.07 as on June 30, 2024.

AGNISYSL

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Agni Systems PLC.' instead of 'Agni Systems Limited' with effect from March 27, 2025. Other things (except name) will remain unchanged.

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
EBL		17.5%	17.5%	Record Date	23-Apr-25

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