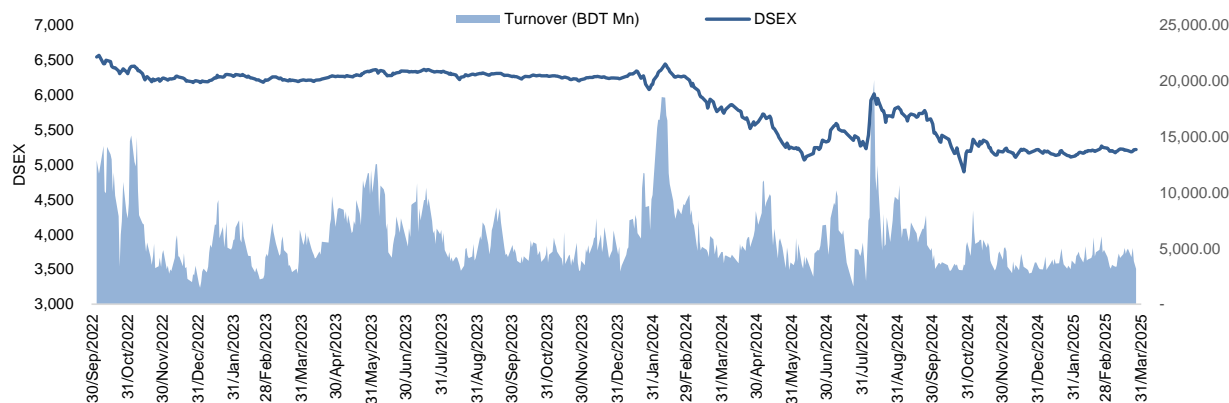


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.10%) gained 4.96 points and closed at 5,219.16. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (+0.11%) closed at 1,914.69, 1,168.11, and 1,049.51 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.63%, followed by Fuel & Power (+0.28%), Bank (+0.22%), Engineering (+0.10%), Pharmaceutical (-0.04%), Food & Allied (-0.14%), and NBFi (-0.76%), respectively. Block trades contributed 7.1% of the overall market turnover. Beximco Pharmaceuticals Ltd. (-2.5%) was the most traded share with a turnover of BDT 152 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,219.16	5,214.21	+4.96	+0.10%	+0.1%
DS30	1,914.69	1,918.06	-3.38	-0.18%	-1.3%
DSES	1,168.11	1,168.03	+0.08	+0.01%	-0.1%
CDSET	1,049.51	1,048.38	+1.13	+0.11%	-1.6%

	Advanced	Declined	Unchanged	Total
All Category	178	148	71	397
A Category (Equity)	102	88	29	219
B Category (Equity)	35	33	15	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	41	27	27	95
Mutual Funds	27	2	7	36
Corporate Bonds	0	0	2	2
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,738,662	6,761,820	-0.3%
Mn USD	55,235	55,425	
Turnover			
Mn BDT	3,151	3,865	-18.5%
Mn USD	26	32	
Volume			
Mn Shares	129	145	-10.8%
No. of Trade	98,226	116,170	-15.4%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 27, 2025

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Figure: Sectorial Turnover (BDT Mn)

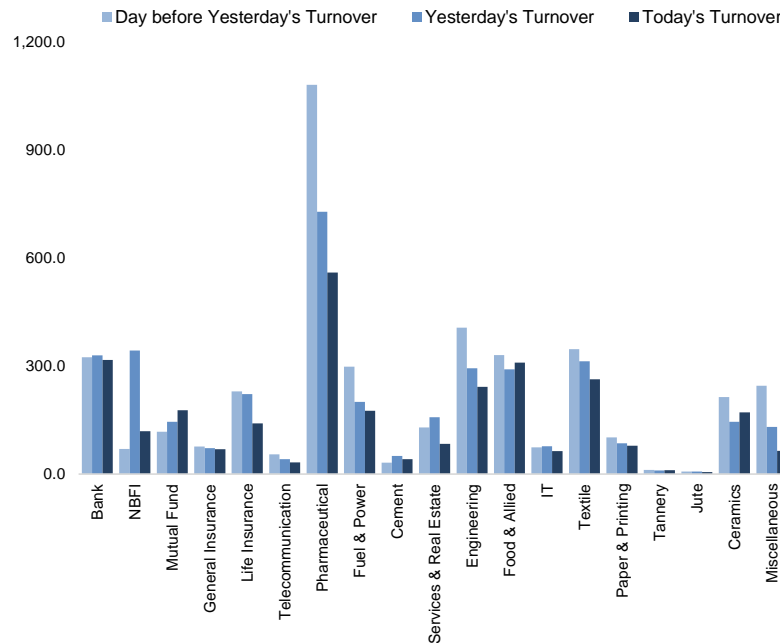
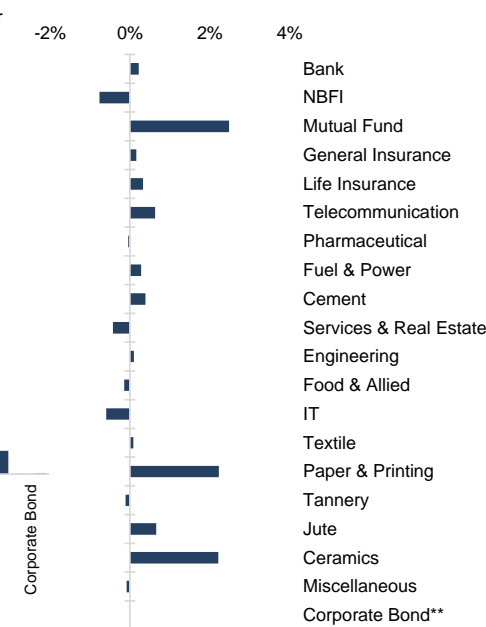


Figure: Sectorial Mcap Change



Market PE 14.7x
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	1,425	+3.12	+0.22%	36	675,629	10.1%	317.3	10.8%	8.6x	0.7x	GP	434,662	12.3%	9.7	12.0x	6.7x
NBFI	1,092	1,101	-8.39	-0.76%	23	104,074	1.6%	118.8	4.1%	NM	NM	SQURPHARMA	195,108	5.5%	61.7	8.7x	1.5x
Mutual Fund	626	610	+15.18	+2.49%	37	28,753	0.4%	177.3	6.1%	NM	0.6x	BATBC	174,636	4.9%	11.1	10.0x	3.0x
General Insurance	2,589	2,584	+4.13	+0.16%	43	73,896	1.1%	69.3	2.4%	13.2x	1.1x	WALTONHIL	140,165	4.0%	5.0	10.6x	1.3x
Life Insurance	1,793	1,787	+5.86	+0.33%	15	47,674	0.7%	140.4	4.8%	NM	NM	ROBI	136,710	3.9%	19.2	19.5x	2.0x
Telecommunication	5,070	5,038	+31.79	+0.63%	3	594,452	8.9%	32.7	1.1%	13.3x	4.0x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,945	2,946	-1.22	-0.04%	34	558,241	8.3%	559.6	19.1%	13.5x	1.6x	BRACBANK	90,078	2.5%	5.4	8.1x	1.2x
Fuel & Power	1,086	1,083	+3.05	+0.28%	23	287,582	4.3%	175.8	6.0%	16.1x	0.6x	BERGERPBL	83,253	2.4%	0.9	24.3x	5.7x
Cement	1,781	1,774	+6.90	+0.39%	7	84,889	1.3%	41.4	1.4%	17.0x	1.9x	MARICO	76,728	2.2%	3.8	13.7x	10.1x
Services & Real Estate	1,020	1,025	-4.33	-0.42%	9	56,123	0.8%	84.2	2.9%	20.0x	0.4x	ISLAMIBANK	70,840	2.0%	6.9	15.2x	1.0x
Engineering	2,475	2,473	+2.49	+0.10%	42	279,233	4.2%	242.3	8.3%	12.7x	0.9x	RENATA	57,406	1.6%	20.7	19.4x	1.7x
Food & Allied	15,774	15,797	-22.86	-0.14%	21	288,630	4.3%	309.8	10.6%	15.7x	4.3x	LHB	52,959	1.5%	14.3	13.9x	2.8x
IT	1,966	1,978	-11.75	-0.59%	11	25,934	0.4%	63.7	2.2%	20.1x	1.7x	UNILEVERCL	48,336	1.4%	0.1	72.4x	19.8x
Textile	1,135	1,134	+1.01	+0.09%	58	118,242	1.8%	262.8	9.0%	94.2x	0.8x	ICB	45,097	1.3%	6.5	35.6x	1.0x
Paper & Printing	4,642	4,541	+101.34	+2.23%	6	20,972	0.3%	78.5	2.7%	NM	1.0x	BXPHARMA	44,210	1.3%	151.8	6.9x	0.9x
Tannery	1,958	1,960	-2.07	-0.11%	6	21,820	0.3%	11.1	0.4%	NM	1.6x	DUTCHBANGL	44,029	1.2%	3.0	7.0x	0.9x
Jute	12,050	11,971	+78.94	+0.66%	3	2,652	0.0%	5.3	0.2%	NM	NM	EBL	36,398	1.0%	60.0	5.5x	0.8x
Ceramics	428	419	+9.27	+2.21%	5	19,198	0.3%	171.6	5.9%	NM	1.2x	PUBALIBANK	33,317	0.9%	8.9	3.5x	0.6x
Miscellaneous	4,249	4,253	-3.42	-0.08%	15	230,748	3.4%	64.7	2.2%	94.9x	1.9x	POWERGRID	32,897	0.9%	0.8	NM	0.3x
Corporate Bond**	15,147	15,147	-	-	16	33,176	0.5%	1.6	0.1%	NM	NM	CITYBANK	31,101	0.9%	28.5	4.3x	0.8x
Treasury Bond**	1,715	1,710	+5.24	+0.31%	234	3,146,166	47.0%	0.2	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
ABB1STMF	4.5	+9.8%	59.4	NM	0.5x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	BXPHARMA	99.1	-2.5%	151.8	6.9x	0.9x
SPCERAMICS	26.2	+9.6%	117.9	NM	0.9x	ISLAMIBANK	74,730	5.3%	15.2x	1.0x	ORIONINFU	391.7	-0.9%	132.0	NM	25.6x
1JANATAMF	3.5	+9.4%	9.3	NM	0.4x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	26.2	+9.6%	117.9	NM	0.9x
SALAMCRST	29.5	+8.1%	68.1	NM	1.6x	BATBC	50,233	3.6%	10.0x	3.0x	BEACHHATCH	110.0	-9.4%	104.3	32.3x	7.3x
PROGRESLIF	68.1	+7.9%	7.4	NM	NM	WALTONHIL	46,773	3.3%	10.6x	1.3x	LOVELLO	83.8	-0.6%	86.7	37.8x	6.6x
PRIME1ICBA	4.8	+6.67%	1.8	NM	0.8x	BRACBANK	46,489	3.3%	8.1x	1.2x	SALAMCRST	29.5	+8.1%	68.1	NM	1.6x
POPULAR1MF	3.4	+6.2%	9.1	NM	0x	GP	44,708	3.2%	12.0x	6.7x	UTTARABANK	25.7	+0.4%	67.4	8.4x	0.8x
EXIM1STMF	3.7	+5.7%	7.5	NM	0.4x	RENATA	32,968	2.3%	19.4x	1.7x	SQURPHARMA	220.1	+0.2%	61.7	8.7x	1.5x
EBLNRBMF	3.8	+5.6%	2.2	NM	0.4x	BXPHARMA	23,409	1.7%	6.9x	0.9x	EBL	26.8	+1.1%	60.0	5.5x	0.8x
VAMLRBBF	5.9	+5.4%	0.6	NM	0.5x	PUBALIBANK	22,905	1.6%	3.5x	0.6x	ABB1STMF	4.5	+9.8%	59.4	NM	0.5x

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)
BEACHHATCH	110.0	-9.4%	104.3	32.3x	7.3x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	RENATA	501.9	501.9	1.0	100	50.19
EBL1STMF	5.8	-7.9%	9.9	NM	1x	15.5%	16.0x	15.4x	49.8x	3.8x	19.5x	8.4x	8.4x	5.1x	MARICO	2,420.0	2,420.0	2.0	15	36.30
PREMIERLEA	3.5	-5.4%	0.1	NM	NM	2.5x	2.5x	1.3x	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	GREENDEL	44.1	44.1	1.0	594	26.18
USMANIAGL	33.8	-4.8%	0.0	NM	0.5x	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	LOVELLO	82.1	80.3	8.0	205	16.71
IPDC	17.0	-4.5%	25.0	21.1x	1.0x	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	EIL	54.0	45.6	6.0	350	16.38
MIDASFIN	10.3	-3.7%	7.1	NM	2.8x	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	ORIONINFU	404.0	404.0	1.0	25	10.08
UTTARAFIN	14.7	-3.3%	0.0	NM	0.2x	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	PREMIERCEM	60.8	53.0	5.0	169	9.08
BDFINANCE	12.7	-3.1%	4.0	NM	1.2x	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	SEAPEARL	38.1	38.1	1.0	200	7.62
FAREASTFIN	3.2	-3.0%	0.1	NM	NM	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	SUNLIFEINS	68.0	68.0	1.0	100	6.80
SEAPEARL	39.9	-2.9%	29.9	NM	2.3x	1.5x	1.5x	1.3%	1.3%	1.1%	1.1%	1.0%	1.0%	1.1%	FINEFOODS	190.2	190.0	3.0	33	6.29

* 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
RENATA	501.9	501.9	50.2	100	1
MARICO	2,420.0	2,420.0	36.3	15	2
GREENDELT	44.1	44.1	26.2	594	1
LOVELLO	82.1	80.3	16.7	205	8
EIL	54.0	45.6	16.4	350	6
ORIONINFU	404.0	404.0	10.1	25	1
PREMIERCEM	60.8	53.0	9.1	169	5
SEAPEARL	38.1	38.1	7.6	200	1
SUNLIFEINS	68.0	68.0	6.8	100	1
FINEFOODS	190.2	190.0	6.3	33	3
KBPPWBIL	175.0	144.0	5.6	34	3
AL-HAJTEX	147.0	146.0	5.2	36	5
ASIATICLAB	39.4	39.4	3.9	100	1
ACFL	19.4	18.0	3.3	180	2
JAMUNAOIL	175.5	175.5	2.6	15	1
HAMI	117.0	117.0	2.3	20	1
ABB1STMF	4.4	4.4	2.1	480	1
BXPHARMA	99.0	99.0	2.0	20	1
KDSALTD	45.4	45.4	1.9	42	1
SALVOCHEM	26.5	21.7	1.4	60	2
CVOPRL	132.3	132.3	1.3	10	1
SIBL	10.7	10.7	1.2	109	2
Total			222.6		57

Important DSE News

PRIMEBANK

Mr. Azam J Chowdhury, a Director of the company, has expressed his intention to transfer 8,500,000 shares of the company to his son Mr. Tanveer A. Chowdhury (Nominated Director of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from March 25, 2025.

MAKSONSPIN

(Q2 Un-audited): EPS was Tk. (1.77) for October-December 2024 as against Tk. (0.86) for October-December 2023; EPS was Tk. (3.49) for July-December 2024 as against Tk. (1.92) for July-December 2023. NOCFPS was Tk. (4.50) for July-December 2024 as against Tk. (2.82) for July-December 2023. NAV per share was Tk. 8.81 as on December 31, 2024 and Tk. 12.29 as on June 30, 2024.

BDSERVICE

(Q2 Un-audited): EPS was Tk. (1.85) for October-December 2024 as against Tk. (1.72) for October-December 2023; EPS was Tk. (5.20) for July-December 2024 as against Tk. (2.74) for July-December 2023. NOCFPS was Tk. 1.97 for July-December 2024 as against Tk. 2.87 for July-December 2023. NAV per share was Tk. 223.06 as on December 31, 2024 and Tk. 228.26 as on June 30, 2024.

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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