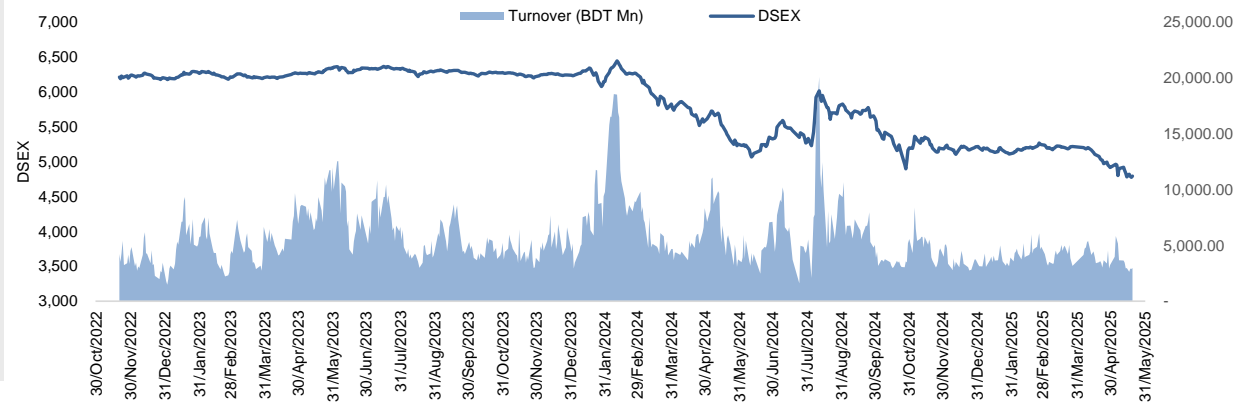


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.39%) gained 18.71 points and closed at 4,795.05. The blue-chip index DS30 (+0.46%), the Shariah-based index DSES (+0.51%), and the large-cap index CDSET (+0.33%) closed at 1,780.07, 1,047.29, and 987.86 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 0.65% followed by NBF1 (+0.61%), Pharmaceutical (+0.54%), Engineering (+0.48%), Telecommunication (+0.22%), Fuel & Power (+0.05%), and Food & Allied (-0.28%), respectively. Block trades contributed 7.9% of the overall market turnover. Orion Infusion Ltd. (+5.3%) was the most traded share with a turnover of BDT 307 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,795.05	4,776.33	+18.71	+0.39%	-8.1%
DS30	1,780.07	1,771.98	+8.09	+0.46%	-8.2%
DSES	1,047.29	1,041.94	+5.35	+0.51%	-10.4%
CDSET	987.86	984.62	+3.24	+0.33%	-7.3%

	Advanced	Declined	Unchanged	Total
All Category	211	104	75	390
A Category (Equity)	106	70	37	213
B Category (Equity)	61	13	8	82
N Category (Equity)	1	0	0	1
Z Category (Equity)	43	21	30	94
Mutual Funds	10	13	13	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,498,169	6,490,918	+0.1%
Mn USD	52,988	52,929	
Turnover			
Mn BDT	2,977	2,888	
Mn USD	24	24	+3.1%
Volume			
Mn Shares	138	171	-19.0%
No. of Trade	98,370	103,308	-4.8%

* Based on Traded Scrips

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Figure: Sectorial Turnover (BDT Mn)

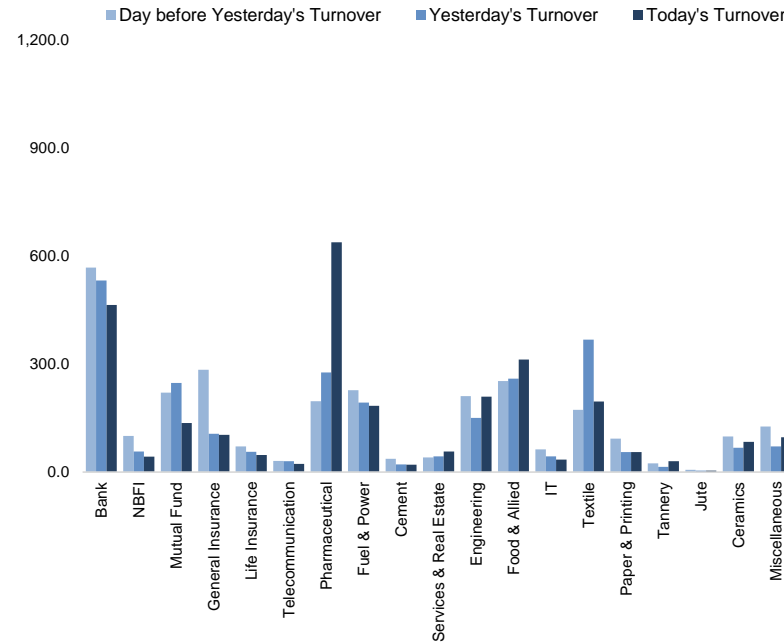
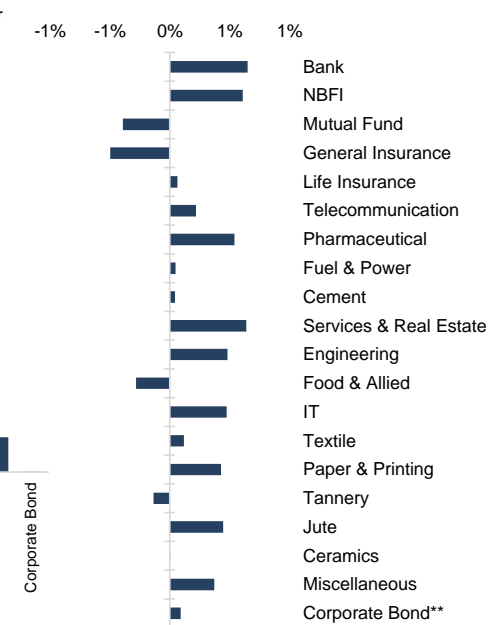


Figure: Sectorial Mcap Change



Market PE 14.4x
Market PB 1.1x

* 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	1,332	1,323	+8.59	+0.65%	36	630,162	9.8%	464.3	16.9%	6.8x	0.6x	GP	397,663	12.2%	12.2	13.6x	5.6x
NBFI	921	916	+5.59	+0.61%	23	87,788	1.4%	43.0	1.6%	NM	NM	SQURPHARMA	186,155	5.7%	158.3	7.9x	1.4x
Mutual Fund	620	622	-2.43	-0.39%	37	28,485	0.4%	136.0	5.0%	NM	0.5x	BATBC	152,712	4.7%	23.8	9.2x	2.9x
General Insurance	2,425	2,437	-12.15	-0.50%	43	69,233	1.1%	103.6	3.8%	11.6x	1.0x	ROBI	126,234	3.9%	9.4	17.5x	1.8x
Life Insurance	1,543	1,542	+1.00	+0.06%	15	41,050	0.6%	47.4	1.7%	NM	NM	WALTONHIL	122,474	3.8%	14.5	9.5x	1.1x
Telecommunication	4,660	4,650	+10.19	+0.22%	3	546,398	8.5%	22.6	0.8%	14.5x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,768	2,753	+14.88	+0.54%	34	524,728	8.1%	638.3	23.3%	12.1x	1.4x	BRACBANK	93,618	2.9%	86.3	6.9x	1.1x
Fuel & Power	1,035	1,035	+0.49	+0.05%	23	274,283	4.3%	184.4	6.7%	17.3x	0.6x	BERGERPBL	82,107	2.5%	0.2	23.9x	5.7x
Cement	1,680	1,679	+0.74	+0.04%	7	80,073	1.2%	20.3	0.7%	19.2x	1.7x	MARICO	79,308	2.4%	4.5	13.4x	10.5x
Services & Real Estate	883	877	+5.60	+0.64%	9	48,558	0.8%	57.0	2.1%	23.0x	0.4x	UPGDCL	68,926	2.1%	0.7	5.9x	1.6x
Engineering	2,188	2,178	+10.47	+0.48%	42	246,839	3.8%	209.3	7.6%	11.3x	0.7x	ISLAMIBANK	54,901	1.7%	5.8	11.8x	0.8x
Food & Allied	13,834	13,873	-39.00	-0.28%	21	253,128	3.9%	312.8	11.4%	14.6x	4.0x	LHB	51,100	1.6%	17.1	14.2x	2.6x
IT	1,643	1,635	+7.77	+0.48%	11	21,671	0.3%	35.0	1.3%	18.2x	1.4x	UNILEVERCL	41,528	1.3%	0.1	71.4x	16.1x
Textile	997	996	+1.16	+0.12%	58	103,870	1.6%	196.2	7.2%	NM	0.7x	BXPHARMA	39,570	1.2%	29.0	6.2x	0.8x
Paper & Printing	3,762	3,746	+16.02	+0.43%	6	16,994	0.3%	55.5	2.0%	NM	0.8x	DUTCHBANGL	37,526	1.2%	3.6	8.6x	0.7x
Tannery	1,857	1,859	-2.51	-0.13%	6	20,686	0.3%	30.1	1.1%	63.6x	1.5x	ICB	35,818	1.1%	2.9	NM	0.9x
Jute	9,821	9,777	+43.51	+0.44%	3	2,162	0.0%	4.4	0.2%	NM	NM	EBL	35,587	1.1%	8.9	5.2x	0.7x
Ceramics	353	353	+0.00	+0.00%	5	15,859	0.2%	84.0	3.1%	NM	1.0x	PUBALIBANK	33,201	1.0%	8.7	4.2x	0.6x
Miscellaneous	4,140	4,125	+15.33	+0.37%	15	224,812	3.5%	96.4	3.5%	91.1x	1.8x	CITYBANK	31,101	1.0%	64.9	3.1x	0.7x
Corporate Bond**	15,222	15,208	+13.88	+0.09%	16	33,339	0.5%	0.3	0.0%	NM	NM	OLYMPIC	28,611	0.9%	3.7	15.5x	2.4x
Treasury Bond**	1,953	1,955	-1.83	-0.09%	234	3,182,046	49.3%	1.2	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
FUWANGFOOD	14.3	+10.0%	60.0	NM	6.2x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	ORIONINFU	377.0	+5.3%	307.3	NM	24.0x
SAMATALETH	53.3	+8.6%	15.5	NM	3.7x	ISLAMIBANK	74,730	5.3%	11.8x	0.8x	SQURPHARMA	210.0	+0.3%	158.3	7.9x	1.4x
MIDLANDBNK	24.2	+7.6%	72.6	18.5x	1.6x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	45.5	+3.2%	123.7	9.7x	2.8x
GOLDENSON	10.9	+6.9%	25.4	NM	0.6x	BATBC	50,233	3.6%	9.2x	2.9x	BRACBANK	52.9	+1.3%	86.3	6.9x	1.1x
BARKAPOWER	11.3	+5.6%	24.6	53.8x	0.5x	WALTONHIL	46,773	3.3%	9.5x	1.1x	MIDLANDBNK	24.2	+7.6%	72.6	18.5x	1.6x
BDTHAI	11.6	+5.45%	14.3	NM	0.4x	BRACBANK	46,489	3.3%	6.9x	1.1x	CITYBANK	23.0	-	64.9	3.1x	0.7x
ORIONINFU	377.0	+5.3%	307.3	NM	24x	GP	44,708	3.2%	13.6x	5.6x	FUWANGFOOD	14.3	+10.0%	60.0	NM	6.2x
ASIATICLAB	32.3	+5.2%	16.7	13.4x	0.6x	RENATA	32,968	2.3%	19.7x	1.6x	BPPL	15.5	+3.3%	48.3	67.4x	0.6x
TAKAFULINS	32.8	+4.8%	0.0	22.2x	1.7x	BXPHARMA	23,409	1.7%	6.2x	0.8x	NRBBANK	11.4	+4.6%	47.1	18.8x	0.9x
NRBBANK	11.4	+4.6%	47.1	18.8x	0.9x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	BSC	89.2	-	46.9	4.6x	0.9x

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)
PRAGATIINS	46.1	-8.9%	1.3	8.2x	0.8x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	ORIONINFU	375.9	350.0	21.0	315	113.79
UCB	10.6	-6.2%	26.5	3.4x	0x	15.5x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	SIBL	9.4	9.1	3.0	5,056	47.51
REGENTTEX	3.2	-5.9%	0.2	NM	0.1x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	NCCBANK	10.3	10.3	1.0	1,318	13.57
TRUSTB1MF	3.5	-5.4%	2.3	NM	0.4x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	HAKKANIPUL	60.1	56.0	3.0	124	7.23
SAIFPOWER	7.8	-4.9%	6.3	11.1x	0.5x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	IFIC	6.2	6.2	1.0	1,161	7.20
ABB1STMF	4.2	-4.5%	33.4	NM	0.5x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	GP	268.5	268.5	1.0	25	6.71
HRTEX	23.3	-4.5%	9.5	NM	7.8x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	SQURPHARMA	210.0	208.5	2.0	29	5.98
SHURWID	6.5	-4.4%	0.6	NM	0.5x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	LOVELLO	77.0	77.0	1.0	50	3.85
VFSTDL	6.7	-4.3%	0.7	55.8x	0.3x	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	GENEXIL	20.5	20.5	1.0	149	3.05
ICBIBANK	2.8	-3.4%	0.2	NM	NM	14.2x	15.5x	14.0x	27.0x	3.1x	17.5x	7.3x	7.8x	4.1x	FINEFOODS	230.5	207.0	2.0	13	2.74

* 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	375.9	350.0	113.8	315	21
SIBL	9.4	9.1	47.5	5,056	3
NCCBANK	10.3	10.3	13.6	1,318	1
HAKKANIPUL	60.1	56.0	7.2	124	3
IFIC	6.2	6.2	7.2	1,161	1
GP	268.5	268.5	6.7	25	1
SQURPHARMA	210.0	208.5	6.0	29	2
LOVELLO	77.0	77.0	3.9	50	1
GENEXIL	20.5	20.5	3.0	149	1
FINEFOODS	230.5	207.0	2.7	13	2
BRACBANK	51.2	51.2	2.6	50	1
LEGACYFOOT	44.5	44.5	2.4	55	1
FEDERALINS	17.4	17.4	1.8	106	1
ABB1STMF	4.6	4.6	1.8	400	1
SEMILLECMF	11.6	11.5	1.7	150	3
BEACONPHAR	107.8	107.8	1.6	15	1
ASIAINS	24.2	24.2	1.5	60	1
CVOPRL	143.0	143.0	1.1	8	1
NLTUBES	76.9	76.9	1.1	14	1
RELIANCE1	19.6	19.6	1.0	50	1
EIL	47.0	47.0	0.9	20	1
SONALIPAPR	138.0	138.0	0.8	6	1
Total			235.1		59

Important DSE News

WALTONHIL

The company has informed that Walton Hi-Tech Industries PLC. has signed a Global Distributorship Agreement with FLAIR M&E PTE. LTD., a private company with limited liability incorporated/registered under the provisions of the relevant laws of Singapore and having its registered office located at 1 Kaki Bukit Road 1, #04-01 Enterprise One, Singapore 415934, Registration No.: 202235844D; Tax No.: 202235844D. According to this Global Distributorship Agreement, Walton Hi-Tech Industries PLC. hereby appointed FLAIR M&E PTE. LTD. as the authorized distributor of WALTON HI-TECH INDUSTRIES PLC. for the selling, distributing and marketing of Walton products within the territory of Singapore, under agreed terms for a period of five (05) years.

BRACBANK

Mr. Asif Saleh, Nominated Director (Nominated by BRAC) of the Company, has completed his buying of 50,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated by DSE on 14.05.2025.

PIONEERINS

The Company has informed that the Board of Directors has elected Mr. Zakir Ahmed Khan, former Secretary to the Government of Bangladesh, as the Chairman of the company.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
UNITEDINS		0.0%	15.0%	Record Date	20-May-25
BNICL		0.0%	20.0%	Record Date	20-May-25
HEIDELBCEM		0.0%	25.0%	Record Date	20-May-25
AGRANINS		6.0%	6.0%	Record Date	20-May-25
PROGRESLIF		0.0%	0.0%	Record Date	20-May-25
UNITEDFIN		0.0%	10.0%	Record Date	21-May-25
BGIC		0.0%	10.0%	Record Date	21-May-25
STANDARINS		0.0%	10.0%	Record Date	22-May-25
MTB		10.0%	0.0%	Record Date	22-May-25
MIDLANDBNK		3.0%	3.0%	Record Date	22-May-25
DUTCHBANGL		10.0%	10.0%	Record Date	22-May-25
PUBALIBANK		12.5%	12.5%	Record Date	22-May-25
CITYBANK		12.5%	12.5%	Record Date	22-May-25
SHAHJABANK		0.0%	10.0%	Record Date	22-May-25
CENTRALINS		0.0%	12.0%	Record Date	25-May-25

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