

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 10.09 points and closed at 4,736.34. The blue-chip index DS30 (-0.39%), the Shariah-based index DSES (-0.45%), and the large-cap index CDSET (-0.33%) closed at 1,746.53, 1,032.56, and 970.24 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.94% followed by Telecommunication (-0.59%), Pharmaceutical (-0.33%), Engineering (-0.14%), NBFi (-0.09%), Bank (+0.06%), and Fuel & Power (+0.47%), respectively. Block trades contributed 4.0% of the overall market turnover. Baraka Patenga Power Limited (+9.7%) was the most traded share with a turnover of BDT 93 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,736.34	4,746.43	-10.09	-0.21%	-9.2%
DS30	1,746.53	1,753.30	-6.76	-0.39%	-10.0%
DSES	1,032.56	1,037.23	-4.68	-0.45%	-11.7%
CDSET	970.24	973.41	-3.17	-0.33%	-9.0%

	Advanced	Declined	Unchanged	Total
All Category	100	215	81	396
A Category (Equity)	48	128	41	217
B Category (Equity)	30	38	14	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	22	49	26	97
Mutual Funds	10	10	16	36
Corporate Bonds	0	4	0	4
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,505,923	6,483,931	+0.3%
	Mn USD	52,954	52,775	
Turnover	Mn BDT	2,355	2,780	-15.3%
	Mn USD	19	23	
Volume	Mn Shares	120	138	-12.7%
No. of Trade		97,640	97,489	+0.2%

* Average Interbank Exchange Rate is BDT 122.86 as of May 25, 2025

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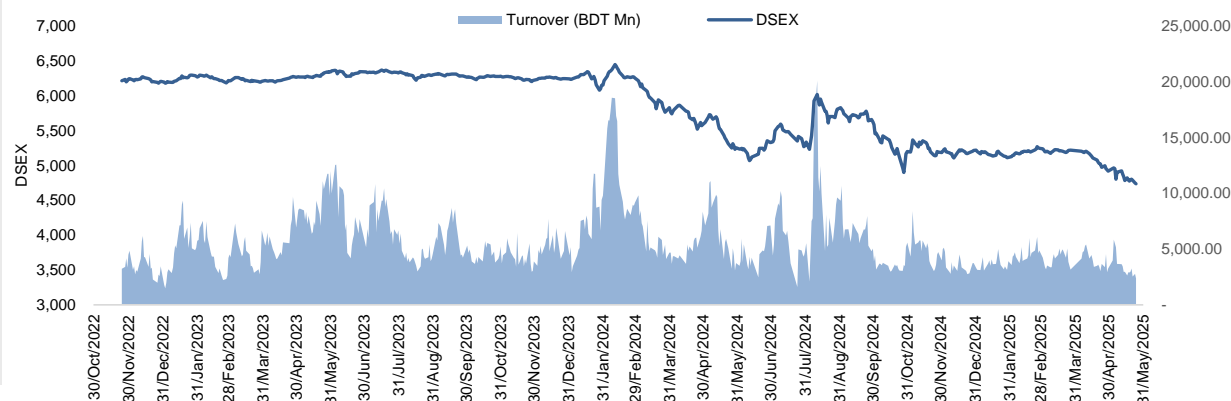


Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

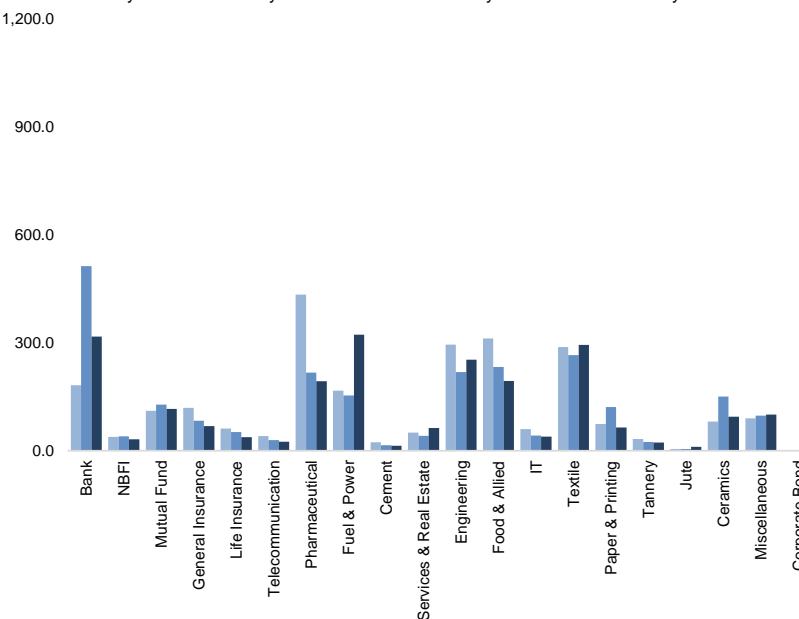
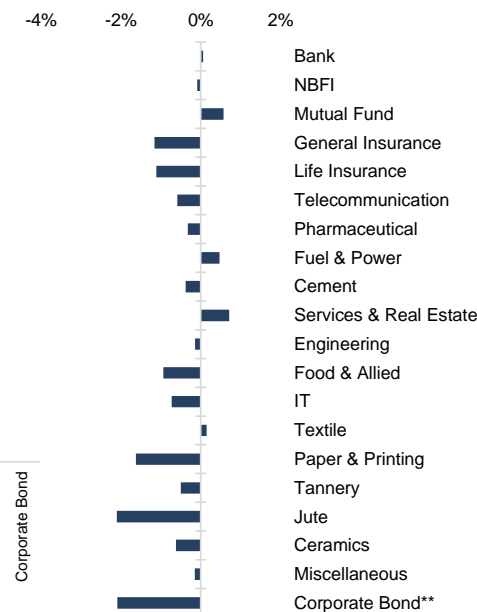


Figure: Sectorial Mcap Change



Market PE 15.0x

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	1,315	1,314	+0.78	+0.06%	36	622,172	9.6%	316.9	14.0%	6.7x	0.6x	GP	367,687	11.5%	12.1	12.6x	5.2x
NBFI	905	906	-0.77	-0.09%	23	86,246	1.3%	31.5	1.4%	NM	NM	SQURPHARMA	183,495	5.7%	15.1	7.8x	1.4x
Mutual Fund	618	615	+3.54	+0.58%	37	28,413	0.4%	116.1	5.1%	NM	0.5x	BATBC	146,934	4.6%	18.5	8.9x	2.8x
General Insurance	2,347	2,375	-27.43	-1.16%	43	67,004	1.0%	68.0	3.0%	11.2x	1.0x	ROBI	124,663	3.9%	12.8	17.2x	1.8x
Life Insurance	1,542	1,559	-17.28	-1.11%	15	41,006	0.6%	37.6	1.7%	NM	NM	WALTONHIL	121,898	3.8%	1.4	9.4x	1.1x
Telecommunication	4,389	4,415	-25.97	-0.59%	3	514,645	7.9%	25.2	1.1%	13.6x	3.3x	BEXIMCO	103,850	3.2%	0.2	NM	1.3x
Pharmaceutical	2,746	2,755	-8.98	-0.33%	34	520,527	8.0%	193.1	8.5%	12.0x	1.4x	BRACBANK	91,848	2.9%	0.0	6.8x	1.1x
Fuel & Power	1,035	1,030	+4.88	+0.47%	23	274,062	4.2%	322.2	14.3%	17.3x	0.6x	BERGERPBL	82,015	2.6%	1.6	23.9x	5.7x
Cement	1,669	1,675	-6.31	-0.38%	7	79,536	1.2%	13.7	0.6%	19.0x	1.7x	MARICO	77,865	2.4%	7.1	13.2x	10.3x
Services & Real Estate	880	874	+6.24	+0.71%	9	48,386	0.7%	63.4	2.8%	22.9x	0.4x	UPGDCL	68,172	2.1%	1.1	5.8x	1.6x
Engineering	2,187	2,190	-3.08	-0.14%	42	246,662	3.8%	252.9	11.2%	11.3x	0.7x	ISLAMIBANK	54,257	1.7%	3.8	11.6x	0.7x
Food & Allied	13,476	13,603	-127.55	-0.94%	21	246,573	3.8%	193.4	8.6%	14.3x	3.9x	LHB	50,984	1.6%	6.9	14.2x	2.5x
IT	1,631	1,643	-11.99	-0.73%	11	21,512	0.3%	39.2	1.7%	18.1x	1.4x	UNILEVERCL	40,765	1.3%	0.0	70.1x	15.8x
Textile	990	989	+1.44	+0.15%	58	103,138	1.6%	294.1	13.0%	NM	0.7x	BXPHARMA	37,964	1.2%	33.8	5.9x	0.8x
Paper & Printing	3,925	3,989	-64.65	-1.62%	6	17,730	0.3%	64.3	2.8%	NM	0.8x	DUTCHBANGL	36,831	1.2%	4.2	8.5x	0.7x
Tannery	1,867	1,876	-9.39	-0.50%	6	20,797	0.3%	22.9	1.0%	63.9x	1.5x	ICB	35,818	1.1%	3.6	NM	0.9x
Jute	9,706	9,914	-208.05	-2.10%	3	2,136	0.0%	10.8	0.5%	NM	NM	EBL	35,587	1.1%	24.2	5.2x	0.7x
Ceramics	361	363	-2.24	-0.62%	5	16,182	0.2%	94.1	4.2%	NM	1.0x	PUBALIBANK	31,885	1.0%	3.1	4.1x	0.6x
Miscellaneous	4,130	4,136	-6.21	-0.15%	15	224,260	3.4%	100.3	4.4%	88.3x	1.8x	CITYBANK	28,751	0.9%	32.1	2.8x	0.6x
Corporate Bond**	14,904	15,222	-318.19	-2.09%	16	32,643	0.5%	0.1	0.0%	NM	NM	OLYMPIC	28,531	0.9%	4.4	15.4x	2.4x
Treasury Bond**	2,022	1,975	+47.14	+2.39%	235	3,291,573	50.6%	1.1	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
BPPL	15.9	+9.7%	92.7	69.1x	0.6x	SQURPHARMA	108,958	7.7%	7.8x	1.4x	BPPL	15.9	+9.7%	92.7	69.1x	0.6x
BARKAPOWER	11.6	+9.4%	46.7	55.2x	0.5x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	MIDLANDBNK	27.0	+5.9%	91.9	21.2x	1.8x
EPGL	16.8	+9.1%	31.8	NM	0.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	22.3	-4.3%	77.9	NM	0.7x
ABB1STMF	4.4	+7.3%	26.9	NM	0.5x	BATBC	50,233	3.6%	8.9x	2.8x	BEACHHATCH	45.2	+0.2%	73.0	9.6x	2.7x
MHSML	13.5	+7.1%	11.3	16.3x	0.7x	WALTONHIL	46,773	3.3%	9.4x	1.1x	SALAMCRST	21.5	+0.5%	64.8	NM	1.2x
SEAPEARL	47.5	+6.74%	41.7	NM	2.9x	BRACBANK	46,489	3.3%	6.8x	1.1x	SONARGAON	42.8	+5.9%	52.7	NM	2.2x
SONARGAON	42.8	+5.9%	52.7	NM	2x	GP	44,708	3.2%	12.6x	5.2x	KBPWBIL	114.7	-	47.0	NM	9.6x
MIDLANDBNK	27.0	+5.9%	91.9	21.2x	1.8x	RENATA	32,968	2.3%	19.8x	1.6x	BARKAPOWER	11.6	+9.4%	46.7	55.2x	0.5x
DSSL	9.3	+5.7%	28.3	32.1x	0.5x	BXPHARMA	23,409	1.7%	5.9x	0.8x	ORIONINFU	353.1	+1.3%	46.0	NM	22.5x
SPCL	38.0	+5.6%	37.1	NM	1.0x	PUBALIBANK	22,905	1.6%	4.1x	0.6x	SEAPEARL	47.5	+6.7%	41.7	NM	2.9x
						CITYBANK	21,020	1.5%	2.8x	0.6x						
						LHB	20,953	1.5%	14.2x	2.5x						
						OLYMPIC	20,496	1.5%	15.4x	2.4x						
						ALARABANK	18,282	1.3%	13.7x	1.0x						
						BEACONPHAR	17,838	1.3%	30.2x	4.0x						
						PRIMEBANK	16,142	1.1%	3.1x	0.6x						
						ROBI	14,876	1.1%	17.2x	1.8x						
						UTTARABANK	13,699	1.0%	7.6x	0.6x						
						NBL	13,055	0.9%	NM	7.6x						
						BSRMLTD	12,852	0.9%	4.1x	0.4x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
ISNLTD	40.6	-7.5%	14.4	NM	14.8x											
BENGALWTL	18.9	-6.0%	26.5	33.8x	1x											
VFSTDL	6.5	-5.8%	0.7	54.2x	0.3x											
SKTRIMS	9.5	-5.0%	1.1	NM	0.6x											
NTC	161.5	-4.8%	0.5	NM	NM											
APEXTANRY	63.3	-4.5%	1.6	NM	2.0x											
BPML	33.2	-4.3%	21.1	NM	0.5x											
SPCERAMICS	22.3	-4.3%	77.9	NM	0.7x											
KEYACOSMET	4.8	-4.0%	2.4	NM	0.4x											
TAKAFULINS	31.3	-3.7%	0.1	21.1x	1.7x											
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* 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
FINEFOODS	212.0	196.7	20.5	99	8
UTTARABANK	19.1	18.1	13.3	700	2
BATBC	252.0	252.0	12.6	50	1
SEAPEARL	43.8	41.0	10.7	246	6
IFIC	6.0	6.0	9.1	1,510	1
GP	289.9	251.0	6.8	27	2
EASTRNLUB	2,000.0	1,937.0	5.9	3	2
INTRACO	19.3	19.3	4.1	210	1
ROBI	21.6	21.6	2.2	100	1
OIMEX	25.8	25.8	1.8	69	1
LOVELLO	77.0	77.0	1.7	22	2
SPCERAMICS	24.0	24.0	1.5	61	1
AL-HAJTEX	120.0	120.0	0.9	8	1
RELIANCE1	16.9	16.9	0.8	45	1
SONARGAON	40.0	40.0	0.7	18	1
DELTALIFE	65.7	65.7	0.7	10	1
SIMTEX	15.4	15.4	0.6	42	1
KBPPWBIL	104.0	104.0	0.5	5	1

Total	94.2	34
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Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CENTRALINS		0.0%	12.0%	Record Date	25-May-25
BRACBANK		12.5%	12.5%	Record Date	25-May-25
EIL		0.0%	5.0%	Record Date	25-May-25
REPUBLIC		5.0%	6.0%	Record Date	25-May-25
BATASHOE		0.0%	105.0%	Record Date	26-May-25
MARICO		0.0%	1950.0%	Record Date	26-May-25
NCCBANK		0.0%	13.0%	Record Date	26-May-25
BANKASIA		10.0%	10.0%	Record Date	26-May-25
EASTERNINS		0.0%	15.0%	Record Date	27-May-25
MERCINS		0.0%	10.0%	Record Date	27-May-25
PLFSL		0.0%	0.0%	Record Date	27-May-25
DBH		15.0%	2.0%	Record Date	27-May-25
IDLC		5.0%	15.0%	Record Date	27-May-25
MEGHNAINS		0.0%	10.0%	Record Date	28-May-25
PROVATIINS		0.0%	10.0%	Record Date	28-May-25

Important DSE News

ILFSL

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 30.06.2025, Time: 11:00 AM, Venue/Mode of AGM: Through Hybrid System at FARS Hotel & Resorts, Akram Center, 212 Shahid Nazrul Islam Rd, Dhaka 1000. Record Date: 19.06.2025. The Company has also reported Consolidated EPS of Tk. (39.01), Consolidated NAV per share of Tk. (212.32) and Consolidated NOCFPS of Tk. (2.01) for the year ended December 31, 2024 as against Tk. (11.07), Tk. (173.31), and Tk. (1.27) respectively for the year ended December 31, 2023.

(Q1 Un-audited): Consolidated EPS was Tk. (2.79) for January-March 2025 as against Tk. (1.86) for January-March 2024. Consolidated NOCFPS was Tk. (0.32) for January-March 2025 as against Tk. 0.16 for January-March 2024. Consolidated NAV per share was Tk. (215.11) as on March 31, 2025 and Tk. (212.32) as on December 31, 2024.

ACI

Referring to their earlier news disseminated by DSE on 08.05.2025, the company has further informed that following the Judgement passed in the Company Matter No. 272 of 2022 on November 07, 2023 by the Honorable High Court Division, 195,374 nos. of ordinary shares of Tk. 10/- (Taka Ten) each only will be issued and allotted in favour of the equity shareholders of Premiaflex Plastics Limited. Name of the Shareholders and Quantity of Ordinary Shares are as follows: 1. Mr. M Anis Ud Dowla - 194,989 shares, 2. Dr. Arif Dowla - 195 shares and 3. Ms. Shusmita Anis - 190 shares. For such issue and allotment, the Record Date will be June 17, 2025. No of outstanding Shares of ACI Ltd.: Before Amalgamation: 87,636,469 shares and After Amalgamation: 87,831,843 shares.

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