

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.58%) lost 29.53 points and closed at 5,044.85. The blue-chip index DS30 (-0.49%), the Shariah-based index DSES (-0.78%), and the large-cap index CDSET (-0.43%) closed at 1,863.36, 1,126.51, and 1,027.14 points, respectively. Most of the large-cap sectors posted negative performance today. NBFJ experienced the highest loss of 1.14% followed by Bank (-1.01%), Food & Allied (-0.71%), Telecommunication (-0.38%), Pharmaceutical (-0.38%), Engineering (-0.28%), and Fuel & Power (+0.52%), respectively. Block trades contributed 5.3% of the overall market turnover. Beach Hatchery Ltd. (-10.0%) was the most traded share with a turnover of BDT 234 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,044.85	5,074.38	-29.53	-0.58%	-3.3%
DS30	1,863.36	1,872.50	-9.14	-0.49%	-3.9%
DSES	1,126.51	1,135.40	-8.89	-0.78%	-3.6%
CDSET	1,027.14	1,031.61	-4.47	-0.43%	-3.7%

	Advanced	Declined	Unchanged	Total
All Category	103	234	60	397
A Category (Equity)	49	141	29	219
B Category (Equity)	31	42	10	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	23	51	21	95
Mutual Funds	4	22	10	36
Corporate Bonds	0	1	2	3
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,670,296	6,691,508	-0.3%
	Mn USD	54,675	54,848	
Turnover	Mn BDT	3,590	3,511	+2.3%
	Mn USD	29	29	
Volume	Mn Shares	144	120	+20.2%
	No. of Trade	132,854	127,929	+3.8%

\* Average Interbank Exchange Rate is BDT 122.00 as of Apr 21, 2025

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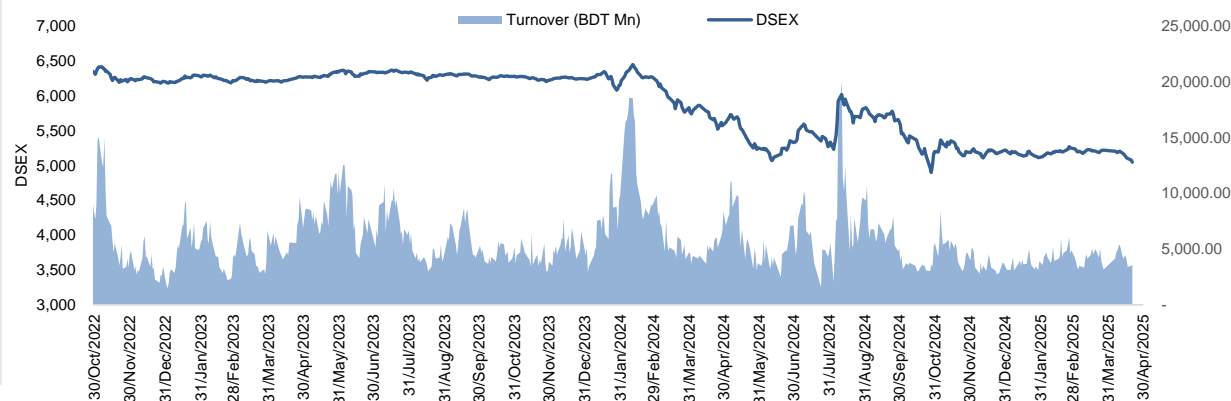


Figure: Sectorial Turnover (BDT Mn)

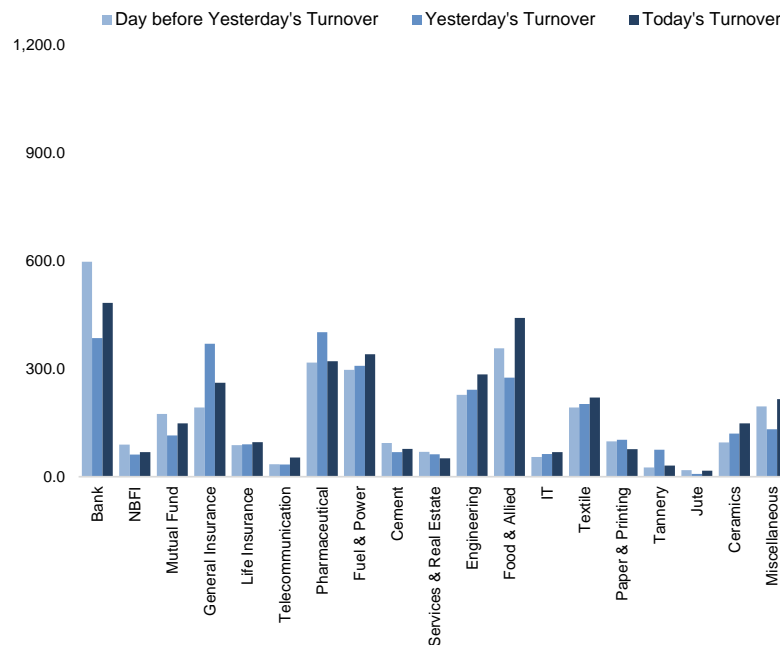
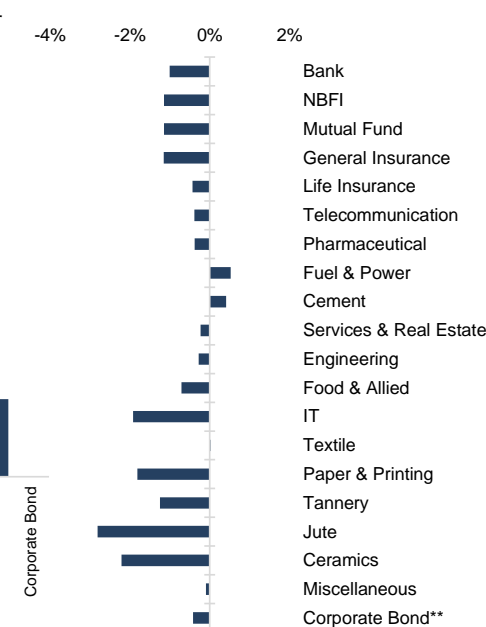


Figure: Sectorial Mcap Change



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	1,364	1,378	-13.85	-1.01%	36	645,348	9.7%	482.9	14.2%	8.2x	0.7x	GP	431,421	12.5%	28.3	11.9x	6.7x
NBFI	1,015	1,027	-11.76	-1.14%	23	96,746	1.5%	68.2	2.0%	NM	NM	SQURPHARMA	189,966	5.5%	25.7	8.5x	1.5x
Mutual Fund	611	618	-7.07	-1.15%	37	28,061	0.4%	148.4	4.4%	NM	0.5x	BATBC	174,312	5.1%	13.0	10.0x	3.0x
General Insurance	2,585	2,615	-30.16	-1.15%	43	73,793	1.1%	261.0	7.7%	13.0x	1.1x	WALTONHIL	137,863	4.0%	3.9	10.4x	1.2x
Life Insurance	1,717	1,725	-7.38	-0.43%	15	45,672	0.7%	96.1	2.8%	NM	NM	ROBI	133,567	3.9%	23.5	19.0x	1.9x
Telecommunication	5,013	5,032	-19.22	-0.38%	3	587,826	8.8%	53.5	1.6%	13.2x	3.9x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,892	2,903	-11.04	-0.38%	34	548,284	8.2%	321.0	9.4%	13.0x	1.5x	BRACBANK	87,247	2.5%	15.2	7.9x	1.2x
Fuel & Power	1,091	1,085	+5.68	+0.52%	23	288,953	4.3%	340.3	10.0%	16.1x	0.6x	BERGERPBL	82,432	2.4%	0.2	24.0x	5.7x
Cement	1,792	1,784	+7.39	+0.41%	7	85,384	1.3%	77.5	2.3%	16.9x	1.9x	MARICO	77,818	2.3%	2.5	13.9x	10.2x
Services & Real Estate	970	972	-2.20	-0.23%	9	53,349	0.8%	51.0	1.5%	19.0x	0.4x	UPGDCL	67,650	2.0%	1.2	6.4x	1.8x
Engineering	2,408	2,415	-6.71	-0.28%	42	271,625	4.1%	284.4	8.4%	12.3x	0.8x	RENATA	57,004	1.7%	15.5	19.3x	1.7x
Food & Allied	15,470	15,580	-110.29	-0.71%	21	283,059	4.2%	441.2	13.0%	15.4x	4.2x	LHB	51,333	1.5%	13.0	13.4x	2.8x
IT	1,845	1,881	-36.07	-1.92%	11	24,339	0.4%	68.4	2.0%	18.9x	1.6x	UNILEVERCL	45,221	1.3%	0.4	67.8x	18.5x
Textile	1,042	1,042	+0.20	+0.02%	58	108,534	1.6%	219.6	6.5%	86.0x	0.7x	BXPHARMA	43,050	1.2%	66.0	6.7x	0.9x
Paper & Printing	4,254	4,333	-78.40	-1.81%	6	19,221	0.3%	76.4	2.2%	NM	0.9x	DUTCHBANGL	42,535	1.2%	6.6	6.8x	0.9x
Tannery	1,886	1,910	-23.84	-1.25%	6	21,016	0.3%	31.0	0.9%	NM	1.5x	ICB	42,322	1.2%	3.0	33.4x	1.0x
Jute	11,341	11,669	-327.87	-2.81%	3	2,496	0.0%	17.0	0.5%	NM	NM	EBL	36,670	1.1%	45.2	5.6x	0.9x
Ceramics	398	407	-8.98	-2.21%	5	17,868	0.3%	148.1	4.4%	NM	1.1x	POWERGRID	31,800	0.9%	5.3	NM	0.2x
Miscellaneous	4,188	4,192	-3.93	-0.09%	15	227,442	3.4%	215.3	6.3%	93.6x	1.9x	PUBALIBANK	31,466	0.9%	1.8	3.3x	0.6x
Corporate Bond**	15,341	15,406	-64.60	-0.42%	16	33,600	0.5%	0.4	0.0%	NM	NM	CITYBANK	30,560	0.9%	18.8	4.3x	0.8x
Treasury Bond**	1,970	1,953	+17.60	+0.90%	236	3,207,202	48.1%	0.1	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
PROGRESLIF	70.6	+10.0%	7.2	NM	NM	SQURPHARMA	108,958	7.7%	8.5x	1.5x	BEACHHATCH	79.4	-10.0%	234.3	23.3x	5.2x
SPCL	41.2	+9.9%	74.1	NM	1.0x	ISLAMIBANK	74,730	5.3%	13.4x	0.9x	BSC	95.1	+2.6%	153.2	4.9x	1.0x
DELTASPINN	5.9	+9.3%	5.3	NM	0.5x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	19.6	+1.0%	123.2	11.3x	1.4x
HEIDELBCEM	268.1	+8.1%	28.6	41.2x	3.7x	BATBC	50,233	3.6%	10.0x	3.0x	SPCERAMICS	23.3	-5.3%	103.7	NM	0.8x
DOREENPWR	24.2	+7.6%	31.0	24.4x	0.5x	WALTONHIL	46,773	3.3%	10.4x	1.2x	UTTARABANK	19.9	-7.2%	84.0	7.6x	0.7x
QUASEMIND	32.6	+6.54%	28.8	69.4x	1.1x	BRACBANK	46,489	3.3%	7.9x	1.2x	SPCL	41.2	+9.9%	74.1	NM	1.0x
IFADAUTOS	25.6	+6.2%	33.0	NM	1x	GP	44,708	3.2%	11.9x	6.7x	BXPHARMA	96.5	-0.9%	66.0	6.7x	0.9x
HAMI	132.3	+5.4%	8.6	NM	14.5x	RENATA	32,968	2.3%	19.3x	1.7x	EASTRNLUB	2,576.6	+1.6%	65.0	73.5x	12.4x
RUNNERAUTO	29.4	+5.0%	26.8	22.4x	0.4x	BXPHARMA	23,409	1.7%	6.7x	0.9x	FINEFOODS	193.4	+2.5%	63.9	83.7x	15.8x
SEMLLECMF	9.4	+4.4%	8.9	NM	1.0x	PUBALIBANK	22,905	1.6%	3.3x	0.6x	DGIC	30.4	+2.4%	63.5	37.5x	2.4x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	4.3x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	79.4	-10.0%	234.3	23.3x	5.2x	LHB	20,953	1.5%	13.4x	2.8x	MIDLANDBNK	18.4	17.6	6.0	2,547	45.81
PREMIERCEM	54.1	-9.2%	25.4	11.3x	1x	OLYMPIC	20,496	1.5%	16.4x	2.6x	RENATA	497.4	497.4	1.0	50	24.87
BDFINANCE	8.4	-8.7%	7.0	NM	NM	ALARABANK	18,282	1.3%	14.5x	1.0x	SEMLLECMF	9.0	8.8	8.0	2,360	21.23
AAMRANET	19.5	-8.0%	6.2	41.2x	0.8x	BEACONPHAR	17,838	1.3%	46.4x	4.1x	SINOBANGLA	47.8	47.8	1.0	400	19.12
UTTARABANK	19.9	-7.2%	84.0	7.6x	0.7x	PRIMEBANK	16,142	1.1%	3.4x	0.6x	PREMIERCEM	60.0	55.0	6.0	315	18.35
AAMRATECH	12.7	-6.6%	1.2	NM	0.6x	ROBI	14,876	1.1%	19.0x	1.9x	BEACHHATCH	91.0	79.5	5.0	147	12.75
KPPL	23.0	-6.5%	14.7	NM	NM	UTTARABANK	13,699	1.0%	7.6x	0.7x	FINEFOODS	190.0	185.0	5.0	42	7.86
SALAMCRST	22.7	-6.2%	35.9	NM	1.2x	NBL	13,055	0.9%	NM	2.1x	SONALIANSH	199.3	163.1	2.0	32	6.33
EBL1STMF	5.2	-5.5%	0.9	NM	0.6x	BSRMLTD	12,852	0.9%	4.9x	0.5x	JAMUNABANK	17.6	17.6	2.0	250	4.40
ICBSONALI1	5.2	-5.5%	7.7	NM	0.8x	* 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					ORIONINFU	410.0	410.0	1.0	10	4.10

\* 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
MIDLANDBNK	18.4	17.6	45.8	2,547	6
RENATA	497.4	497.4	24.9	50	1
SEMLLECMF	9.0	8.8	21.2	2,360	8
SINOBANGLA	47.8	47.8	19.1	400	1
PREMIERCEM	60.0	55.0	18.4	315	6
BEACHHATCH	91.0	79.5	12.8	147	5
FINEFOODS	190.0	185.0	7.9	42	5
SONALIANSH	199.3	163.1	6.3	32	2
JAMUNABANK	17.6	17.6	4.4	250	2
ORIONINFU	410.0	410.0	4.1	10	1
MIRAKHTER	31.0	31.0	3.4	110	1
SUNLIFEINS	73.3	67.6	2.8	41	2
EASTRNLUB	2,560.0	2,560.0	2.6	1	1
NRBBANK	13.2	13.2	2.5	190	1
CONFIDCEM	50.8	50.8	2.1	42	1
TOSRIFA	21.0	21.0	2.1	100	1
RELIANCE1	20.5	20.4	1.6	80	3
INTRACO	26.1	26.1	1.3	50	1
SIBL	10.8	10.8	0.9	80	1
EPGL	20.2	20.2	0.8	39	1
IFIC	6.8	6.8	0.7	100	1
LANKABAFIN	18.1	18.1	0.6	34	1
<b>Total</b>			<b>188.8</b>		<b>57</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PARAMOUNT		0.0%	10.0%	Record Date	22-Apr-25
EBL		17.5%	17.5%	Record Date	23-Apr-25
RECKITTBEN		0.0%	3330.0%	Record Date	29-Apr-25
PRIMEFIN		0.0%	0.0%	Record Date	6-May-25
IPDC		5.0%	5.0%	Record Date	8-May-25
BDFINANCE		0.0%	0.0%	Record Date	8-May-25
IDLC		5.0%	15.0%	Record Date	12-May-25
JAMUNABANK		6.5%	17.5%	Record Date	14-May-25
PRAGATIINS		7.0%	20.0%	Record Date	19-May-25
MEGHNAINS		0.0%	10.0%	Record Date	28-May-25
EASTLAND		0.0%	10.0%	Record Date	2-Jun-25

#### Important DSE News

##### JAMUNABANK

The Board of Directors has recommended 17.50% Cash and 6.50% Stock dividend for the year ended December 31, 2024. Date of AGM: 24.06.2025, Time: 11:00 AM, Venue: Digital Platform through the link: <https://jamunabank.bdvirtualagm.com>. Record date: 14.05.2025. The Company has also reported Consolidated EPS of Tk. 3.17, Consolidated NAV per share of Tk. 24.61 and Consolidated NOCFPS of Tk. 14.31 for the year ended December 31, 2024 as against Tk. 2.68 (restated), Tk. 24.67 (restated) and Tk. 17.68 (restated) respectively for the year ended December 31, 2023.

The Board of Directors of the company has decided to raise capital through issuance of Non-Convertible Coupon Bearing Subordinated redeemable bond (5th phase) amounting to BDT 1,000.00 crore as part of the Tier-II of Revised Regulatory Capital Framework for banks in line with Basel III through private Placement subject to the approval from the concerned Regulatory Authorities. The purpose of the proposed bond is to strengthen the capital base of the Bank.

##### MEGHNAINS

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 18.06.2025, Time: 11:00 AM, Venue: Hybrid Platform (Venue and Link of AGM will be notified later). Record Date: 28.05.2025. The Company has also reported EPS of Tk. 1.31, NAV per share of Tk. 14.26 and NOCFPS of Tk. 1.95 for the year ended December 31, 2024 as against Tk. 1.29, Tk. 14.60 and Tk. (0.03) respectively for the year ended December 31, 2023.

##### MIRACLEIND

**(Q3 Un-audited):** EPS was Tk. (0.64) for January-March 2025 as against Tk. (0.64) for January-March 2024; EPS was Tk. (1.63) for July 2024-March 2025 as against Tk. (1.78) for July 2023-March 2024. NOCFPS was Tk. 0.54 for July 2024-March 2025 as against Tk. (0.84) for July 2023-March 2024. NAV per share was Tk. 18.38 as on March 31, 2025 and Tk. 13.62 as on June 30, 2024.

##### FASFIN

The company has informed that in accordance with the decision of the Board of Directors of the company and subsequent approval of Bangladesh Bank, Mr. Md. Abdul Wahab has been appointed and joined as the Managing Director and CEO of the company with effect from March 20, 2025.

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