

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.36%) lost 18.28 points and closed at 5,026.57. The blue-chip index DS30 (-0.19%), the Shariah-based index DSES (-0.41%), and the large-cap index CDSET (-0.09%) closed at 1,859.84, 1,121.84, and 1,026.23 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.70% followed by NBF (0.48%), Pharmaceutical (-0.40%), Fuel & Power (-0.37%), Engineering (-0.24%), Telecommunication (+0.01%), and Food & Allied (+0.10%), respectively. Block trades contributed 6.2% of the overall market turnover. Alif Industries Limited (+9.3%) was the most traded share with a turnover of BDT 108 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,026.57	5,044.85	-18.28	-0.36%	-3.6%
DS30	1,859.84	1,863.36	-3.52	-0.19%	-4.1%
DSES	1,121.84	1,126.51	-4.67	-0.41%	-4.0%
CDSET	1,026.23	1,027.14	-0.91	-0.09%	-3.7%

	Advanced	Declined	Unchanged	Total
All Category	119	214	68	401
A Category (Equity)	81	115	26	222
B Category (Equity)	19	46	18	83
N Category (Equity)	1	0	0	1
Z Category (Equity)	18	53	24	95
Mutual Funds	28	2	6	36
Corporate Bonds	2	1	1	4
Treasury Bonds	0	5	0	5

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,674,415	6,670,296	+0.1%
	Mn USD	54,708	54,675	
Turnover	Mn BDT	3,403	3,590	-5.2%
	Mn USD	28	29	
Volume	Mn Shares	142	144	-1.5%
	No. of Trade	125,632	132,854	-5.4%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 22, 2025

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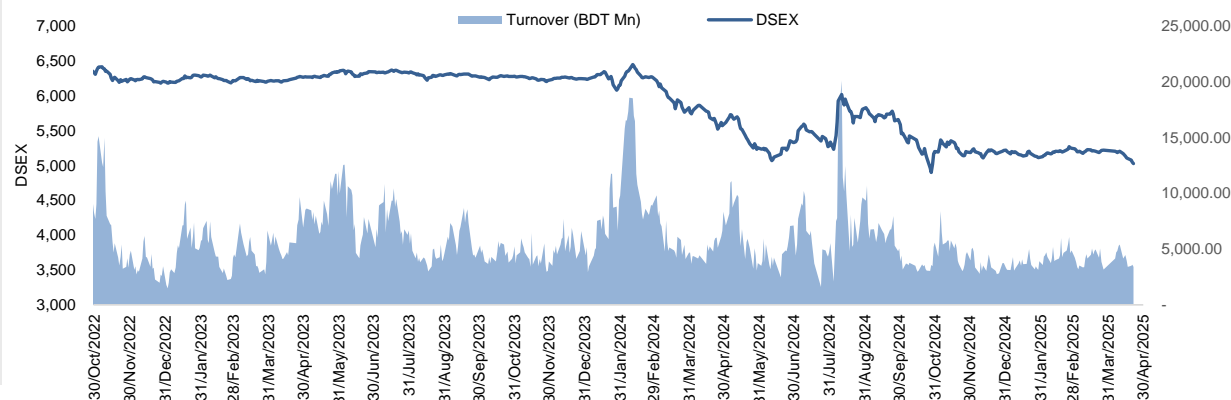


Figure: Sectorial Turnover (BDT Mn)

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

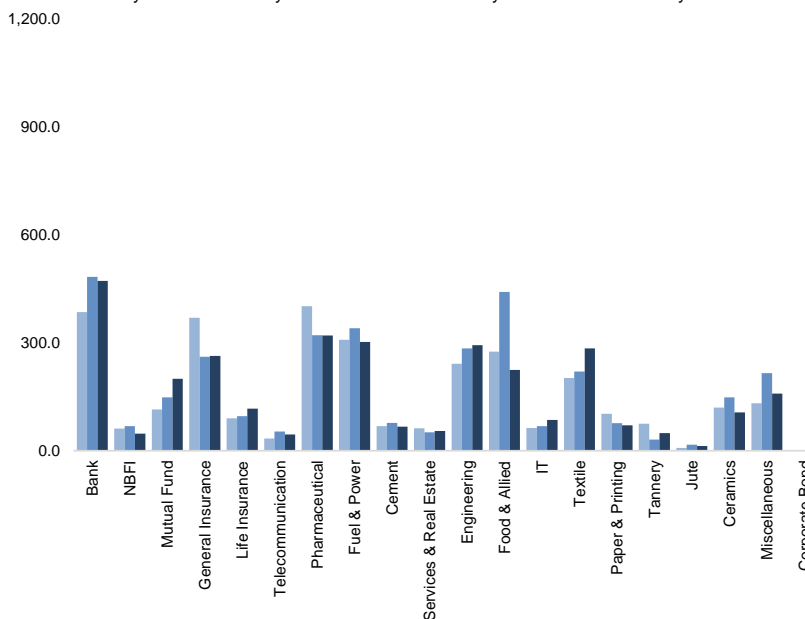
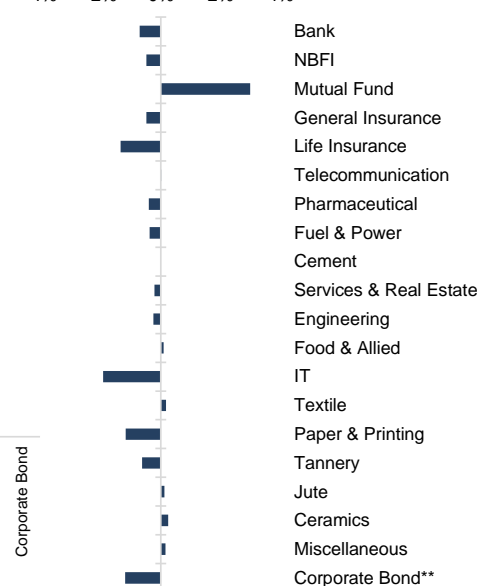


Figure: Sectorial Mcap Change

-4% -2% 0% 2% 4%



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	1,354	1,364	-9.58	-0.70%	36	640,814	9.7%	471.4	14.8%	8.2x	0.7x	GP	431,691	12.6%	13.5	11.9x	6.7x
NBFI	1,010	1,015	-4.85	-0.48%	23	96,284	1.5%	47.1	1.5%	NM	NM	SQURPHARMA	189,701	5.5%	31.1	8.5x	1.5x
Mutual Fund	629	611	+18.25	+2.99%	37	28,900	0.4%	199.8	6.3%	NM	0.6x	BATBC	174,366	5.1%	12.5	10.0x	3.0x
General Insurance	2,573	2,585	-12.43	-0.48%	43	73,438	1.1%	263.1	8.2%	12.9x	1.1x	WALTONHIL	137,681	4.0%	3.4	10.4x	1.2x
Life Insurance	1,694	1,717	-23.09	-1.34%	15	45,058	0.7%	116.7	3.7%	NM	NM	ROBI	133,043	3.9%	22.0	19.0x	1.9x
Telecommunication	5,014	5,013	+0.71	+0.01%	3	587,909	8.9%	45.5	1.4%	13.2x	3.9x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,881	2,892	-11.53	-0.40%	34	546,099	8.2%	319.8	10.0%	13.0x	1.5x	BRACBANK	87,778	2.6%	45.1	7.9x	1.2x
Fuel & Power	1,087	1,091	-4.06	-0.37%	23	287,876	4.3%	302.3	9.5%	16.1x	0.6x	BERGERPBL	83,063	2.4%	0.8	24.2x	5.7x
Cement	1,791	1,792	-0.27	-0.02%	7	85,371	1.3%	66.8	2.1%	16.9x	1.9x	MARICO	77,191	2.2%	3.5	13.8x	10.2x
Services & Real Estate	968	970	-2.03	-0.21%	9	53,238	0.8%	55.1	1.7%	19.0x	0.4x	UPGDCL	67,650	2.0%	1.9	6.4x	1.8x
Engineering	2,402	2,408	-5.90	-0.24%	42	270,960	4.1%	293.2	9.2%	12.3x	0.8x	RENATA	56,993	1.7%	5.5	19.3x	1.7x
Food & Allied	15,485	15,470	+14.96	+0.10%	21	283,333	4.3%	224.3	7.0%	15.5x	4.2x	LHB	51,333	1.5%	18.2	13.4x	2.8x
IT	1,810	1,845	-35.50	-1.92%	11	23,870	0.4%	85.7	2.7%	18.5x	1.5x	UNILEVERCL	45,645	1.3%	0.0	68.4x	18.7x
Textile	1,044	1,042	+1.78	+0.17%	58	108,720	1.6%	283.8	8.9%	86.2x	0.7x	DUTCHBANGL	42,447	1.2%	1.6	6.8x	0.9x
Paper & Printing	4,205	4,254	-49.90	-1.17%	6	18,996	0.3%	70.7	2.2%	NM	0.9x	ICB	42,322	1.2%	2.7	33.4x	1.0x
Tannery	1,875	1,886	-11.75	-0.62%	6	20,885	0.3%	49.0	1.5%	NM	1.5x	BXPHARMA	42,291	1.2%	60.9	6.6x	0.9x
Jute	11,355	11,341	+14.17	+0.12%	3	2,500	0.0%	12.9	0.4%	NM	NM	EBL	36,670	1.1%	82.7	5.6x	0.9x
Ceramics	399	398	+0.99	+0.25%	5	17,912	0.3%	106.6	3.3%	NM	1.1x	POWERGRID	31,892	0.9%	2.6	NM	0.2x
Miscellaneous	4,195	4,188	+6.55	+0.16%	15	227,798	3.4%	158.9	5.0%	93.7x	1.9x	PUBALIBANK	31,003	0.9%	8.0	3.2x	0.6x
Corporate Bond**	15,158	15,341	-182.94	-1.19%	16	33,199	0.5%	1.8	0.1%	NM	NM	OLYMPIC	30,571	0.9%	7.5	16.6x	2.6x
Treasury Bond**	1,979	1,970	+8.66	+0.44%	236	3,185,437	48.0%	16.7	0.5%	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
MBL1STMF	4.5	+9.8%	3.3	NM	0.5x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	AIL	49.3	+9.3%	108.2	18.5x	2.1x
AIL	49.3	+9.3%	108.2	18.5x	2.1x	ISLAMIBANK	74,730	5.3%	13.0x	0.8x	SPCL	40.2	-2.4%	96.6	NM	1.0x
POPULAR1MF	3.6	+9.1%	3.9	NM	0.4x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	23.6	+1.3%	88.6	NM	0.8x
1JANATAMF	3.6	+9.1%	5.4	NM	0.4x	BATBC	50,233	3.6%	10.0x	3.0x	MIDLANDBNK	19.1	-2.6%	87.7	11.0x	1.3x
WMSHIPYARD	8.8	+7.3%	4.7	NM	0.5x	WALTONHIL	46,773	3.3%	10.4x	1.2x	ABB1STMF	5.2	+2.0%	83.2	NM	0.6x
KAY&QUE	219.2	+6.67%	14.2	NM	2.3x	BRACBANK	46,489	3.3%	7.9x	1.2x	EBL	27.0	-	82.7	5.6x	0.9x
SEMLFBSLGF	5.1	+6.3%	1.8	NM	0x	GP	44,708	3.2%	11.9x	6.7x	FINEFOODS	200.7	+3.8%	73.6	86.9x	16.4x
PHPMF1	3.4	+6.2%	2.3	NM	0.4x	RENATA	32,968	2.3%	19.3x	1.7x	BSC	94.1	-1.1%	69.3	4.9x	1.0x
EXIM1STMF	3.6	+5.9%	2.4	NM	0.4x	BXPHARMA	23,409	1.7%	6.6x	0.9x	GLOBALINS	31.3	+5.7%	69.0	22.5x	2.1x
TRUSTB1MF	3.6	+5.9%	3.3	NM	0.4x	PUBALIBANK	22,905	1.6%	3.2x	0.6x	ORIONINFU	384.6	-1.6%	63.3	NM	25.1x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	4.2x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	71.5	-9.9%	34.1	21.0x	4.7x	LHB	20,953	1.5%	13.4x	2.8x	BRACBANK	49.8	49.6	2.0	1,000	49.70
DGIC	28.5	-6.3%	26.1	35.2x	2x	OLYMPIC	20,496	1.5%	16.6x	2.6x	ACI	216.2	206.0	10.0	208	43.90
NURANI	3.1	-6.1%	1.3	NM	0.3x	ALARABANK	18,282	1.3%	14.4x	1.0x	SEMILLECMF	9.5	8.5	11.0	2,148	19.36
CNATEX	3.3	-5.7%	2.6	NM	NM	BEACONPHAR	17,838	1.3%	47.2x	4.1x	FINEFOODS	193.8	185.0	12.0	98	18.92
SALAMCRST	21.5	-5.3%	47.4	NM	1.2x	PRIMEBANK	16,142	1.1%	3.5x	0.7x	BEACHHATCH	82.0	71.5	11.0	229	17.49
APEXFOOT	222.5	-4.9%	41.2	18.1x	0.5x	ROBI	14,876	1.1%	19.0x	1.9x	SONALIANSH	192.3	192.3	2.0	66	12.77
ADNTEL	77.9	-4.8%	37.1	13.9x	2.4x	UTTARABANK	13,699	1.0%	7.4x	0.7x	RELIANCE1	20.4	19.2	4.0	490	9.88
BDFINANCE	8.0	-4.8%	4.1	NM	NM	NBL	13,055	0.9%	NM	2.2x	MIDLANDBNK	18.2	18.2	4.0	400	7.28
EASTRNLUB	2,454.4	-4.7%	51.4	70.0x	11.8x	BSRMLTD	12,852	0.9%	4.9x	0.5x	ASIATICLAB	29.1	29.1	1.0	238	6.93
METROSPIN	12.6	-4.5%	0.7	NM	2.5x	* 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	394.9	394.9	1.0	6	2.37

* 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
BRACBANK	49.8	49.6	49.7	1,000	2
ACI	216.2	206.0	43.9	208	10
SEMLLECMF	9.5	8.5	19.4	2,148	11
FINEFOODS	193.8	185.0	18.9	98	12
BEACHHATCH	82.0	71.5	17.5	229	11
SONALIANS	192.3	192.3	12.8	66	2
RELIANCE1	20.4	19.2	9.9	490	4
MIDLANDBNK	18.2	18.2	7.3	400	4
ASIATICLAB	29.1	29.1	6.9	238	1
ORIONINFU	394.9	394.9	2.4	6	1
GPHISPAT	21.5	21.0	2.1	100	2
LOVELLO	85.5	79.0	2.1	26	3
SONALILIFE	49.0	49.0	2.0	42	1
RENATA	540.0	540.0	1.6	3	1
AL-HAJTEX	137.1	122.0	1.4	11	2
IFIC	7.0	7.0	1.4	200	1
SAMORITA	66.7	66.7	1.4	21	1
BEXGSUKUK	42.0	42.0	1.3	32	1
GLOBALINS	31.0	31.0	1.2	40	2
APEXFOOT	233.9	233.9	1.2	5	1
KBPPWBIL	110.0	110.0	1.1	10	1
QUEENSOUTH	12.9	12.9	1.0	79	1
Total			211.7		84

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
UNITEDINS		0.0%	15.0%	Record Date	20-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
UNITEDINS

The Board of Directors has recommended 15% Cash Dividend for the year ended December 31, 2024. Date of AGM: 24.06.2025, Time: 11:00 AM. Venue: Digital Platform. Record date: 20.05.2025. The Company has also reported EPS of Tk. 2.26, NAV per share of Tk. 30.59 and NOCFPS of Tk. 0.99 for the year ended on 31-Dec-2024 as against Tk. 1.78, Tk. 31.42 and Tk. 0.51 respectively for the year ended on 31-Dec-2023.

BSCPLC

(Q3 Un-audited): Basic EPS was Tk. 2.56 and Diluted EPS was Tk. 2.33 for January-March 2025 as against Tk. 2.45, Tk. 1.99 and Tk. 2.16 (restated) for January-March 2024; Basic EPS was Tk. 7.49 and Diluted EPS was Tk. 6.83 for July 2024-March 2025 as against Tk. 10.20, Tk. 8.29 and Tk. 8.99 (restated) for July 2023-March 2024. NOCFPS was Tk. 7.83 for July 2024-March 2025 as against Tk. 14.06 for July 2023-March 2024. NAV per share was Tk. 86.41 as on March 31, 2025 and Tk. 93.06 as on June 30, 2024.

FEKDIL

The Board of Directors of the company has approved the purchase of land measuring more or less 318.50 Decimals with 3 Storied Building (total 78000 sq.ft.) for a total consideration of BDT 200,000,000.00 (In Words: Taka Twenty Crore) only, excluding registration and others related expenses located at Kaliakoir (Shafipur Union Land Office). Gazipur from owners of the land Munazzama Mustari Tania, Md. Rahbar Wahed Khan and Md. Rafsani Wahed Khan, having their address at House No. 80, Road No. 15, Block-C, Banani, Dhaka-1213. The land has been leased to the company since February 03, 2025 and the acquired land will be utilized for the Company's garments business including manufacturing, printing, dyeing and knitting operations.

ZAHINTEX

The company has informed that the share office of the company has been relocated to the following address with effect from April 21, 2025. New Share Office address: AH Tower, Room - 06 (14th Floor), House no. 56, Road-02, Sec-03, Uttara, Dhaka. Corporate head office and registered office addresses will remain unchanged.

ASIAINS

The company has informed that the Board of Directors has elected Mr. Mohammad Mustafa Haider as the Chairman of the company.

EMERALDOIL

The company has informed that the Board of Directors has appointed Major Khaled Saifullah (Retd.) as the Chairman of the Board of Directors and Mr. Md. Abu Hurayra, FCA, ACS as the Acting Managing Director of the company.

ACI

Ms. Shusmita Anis, one of the Directors of the Company, has further informed that she has completed her buying of 775,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 13.04.2025.

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