

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.08%) lost 4.1 points and closed at 5,022.47. The blue-chip index DS30 (+0.41%), the Shariah-based index DSES (-0.06%), and the large-cap index CDSET (+0.28%) closed at 1,867.52, 1,121.20, and 1,029.13 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 1.03%, followed by Telecommunication (+0.45%), NBFi (+0.42%), Food & Allied (+0.23%), Pharmaceutical (-0.05%), Bank (-0.27%), and Engineering (-0.57%), respectively. Block trades contributed 3.7% of the overall market turnover. Shahjibazar Power Co. Ltd. (+10.0%) was the most traded share with a turnover of BDT 128 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,022.47	5,026.57	-4.10	-0.08%	-3.7%
DS30	1,867.52	1,859.84	+7.68	+0.41%	-3.7%
DSES	1,121.20	1,121.84	-0.64	-0.06%	-4.1%
CDSET	1,029.13	1,026.23	+2.90	+0.28%	-3.5%

	Advanced	Declined	Unchanged	Total
All Category	119	214	62	395
A Category (Equity)	71	118	26	215
B Category (Equity)	21	49	14	84
N Category (Equity)	0	0	1	1
Z Category (Equity)	27	47	21	95
Mutual Funds	3	23	9	35
Corporate Bonds	1	0	1	2
Treasury Bonds	0	1	0	1

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,673,606	6,674,415	-0.0%
	Mn USD	54,702	54,708	-0.0%
Turnover	Mn BDT	3,006	3,403	-11.7%
	Mn USD	25	28	-11.7%
Volume	Mn Shares	128	142	-9.8%
	No. of Trade	117,816	125,632	-6.2%

\* Based on Traded Scrips

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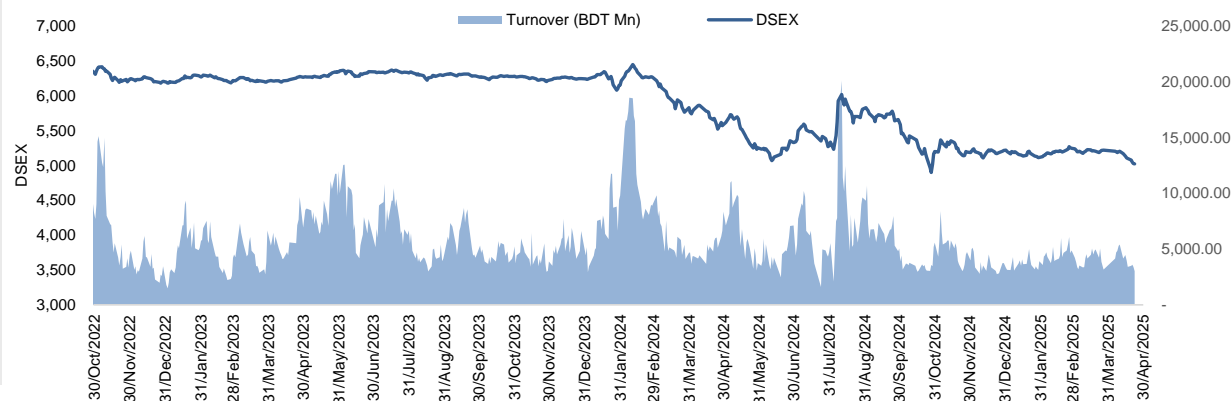


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

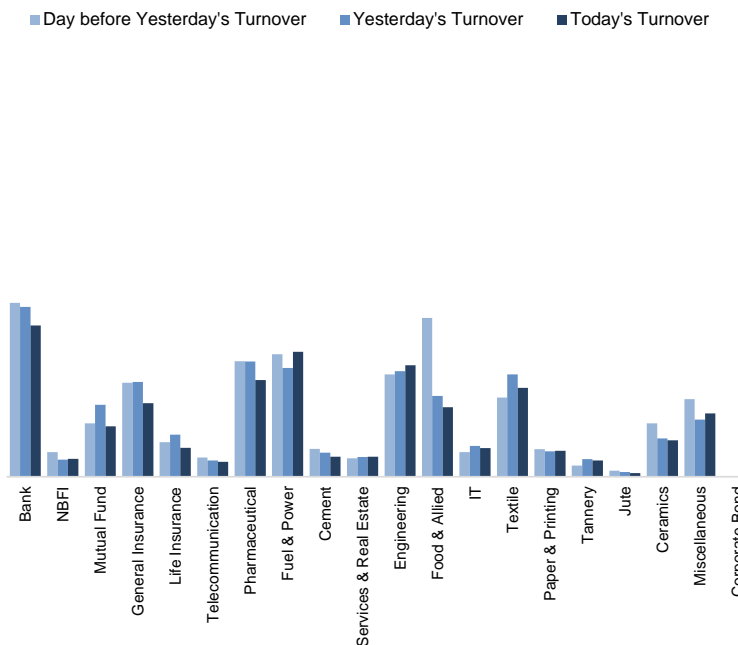
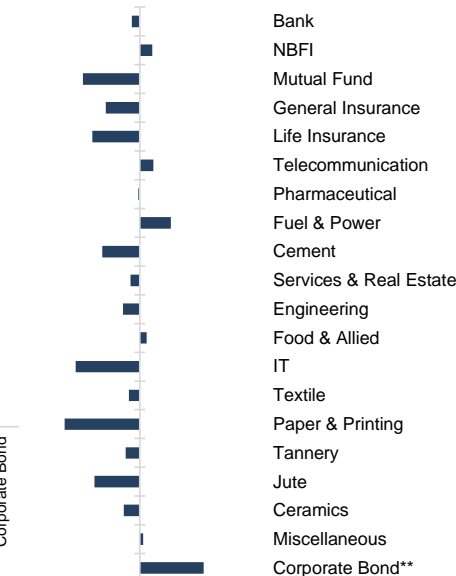


Figure: Sectorial Mcap Change

-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	1,351	1,354	-3.63	-0.27%	36	639,097	9.6%	420.0	14.5%	8.1x	0.7x	GP	433,851	12.6%	12.9	11.9x	6.7x
NBFI	1,015	1,010	+4.21	+0.42%	23	96,685	1.5%	49.4	1.7%	NM	NM	SQURPHARMA	189,966	5.5%	14.5	8.5x	1.5x
Mutual Fund	617	629	-11.94	-1.90%	37	28,351	0.4%	140.0	4.8%	NM	0.5x	BATBC	174,420	5.1%	19.8	10.0x	3.0x
General Insurance	2,543	2,573	-29.13	-1.13%	43	72,607	1.1%	204.3	7.1%	12.8x	1.1x	WALTONHIL	136,924	4.0%	2.2	10.4x	1.2x
Life Insurance	1,667	1,694	-26.87	-1.59%	15	44,343	0.7%	80.2	2.8%	NM	NM	ROBI	133,043	3.9%	22.1	19.0x	1.9x
Telecommunication	5,036	5,014	+22.57	+0.45%	3	590,555	8.9%	41.4	1.4%	13.2x	4.0x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,879	2,881	-1.49	-0.05%	34	545,816	8.2%	268.4	9.3%	13.0x	1.5x	BRACBANK	88,663	2.6%	55.4	8.0x	1.2x
Fuel & Power	1,098	1,087	+11.24	+1.03%	23	290,855	4.4%	346.7	12.0%	16.2x	0.6x	BERGERPBL	83,030	2.4%	1.0	24.2x	5.7x
Cement	1,769	1,791	-22.48	-1.26%	7	84,299	1.3%	55.4	1.9%	16.7x	1.9x	MARICO	77,471	2.3%	4.9	13.8x	10.2x
Services & Real Estate	965	968	-3.02	-0.31%	9	53,072	0.8%	55.3	1.9%	18.9x	0.4x	UPGDCL	68,984	2.0%	5.1	6.5x	1.8x
Engineering	2,388	2,402	-13.59	-0.57%	42	269,427	4.1%	309.5	10.7%	12.2x	0.8x	RENATA	56,912	1.7%	6.8	19.2x	1.7x
Food & Allied	15,520	15,485	+35.47	+0.23%	21	283,982	4.3%	193.3	6.7%	15.5x	4.2x	LHB	51,681	1.5%	8.5	13.5x	2.8x
IT	1,771	1,810	-38.74	-2.14%	11	23,359	0.4%	79.5	2.7%	18.1x	1.5x	UNILEVERCL	46,251	1.3%	0.0	69.3x	18.9x
Textile	1,040	1,044	-3.78	-0.36%	58	108,326	1.6%	246.7	8.5%	96.1x	0.7x	BXPHARMA	42,604	1.2%	46.6	6.7x	0.9x
Paper & Printing	4,099	4,205	-105.55	-2.51%	6	18,519	0.3%	71.8	2.5%	NM	0.8x	ICB	42,496	1.2%	4.4	33.5x	1.0x
Tannery	1,866	1,875	-8.80	-0.47%	6	20,787	0.3%	45.1	1.6%	90.0x	1.6x	DUTCHBANGL	40,689	1.2%	5.0	6.5x	0.8x
Jute	11,183	11,355	-172.37	-1.52%	3	2,462	0.0%	10.4	0.4%	NM	NM	EBL	36,670	1.1%	0.0	5.6x	0.9x
Ceramics	397	399	-2.13	-0.53%	5	17,817	0.3%	101.0	3.5%	NM	1.1x	POWERGRID	32,166	0.9%	6.2	NM	0.2x
Miscellaneous	4,200	4,195	+4.71	+0.11%	15	228,053	3.4%	175.7	6.1%	93.8x	1.9x	PUBALIBANK	31,350	0.9%	2.3	3.3x	0.6x
Corporate Bond**	15,481	15,158	+323.02	+2.13%	16	33,907	0.5%	0.6	0.0%	NM	NM	OLYMPIC	31,031	0.9%	11.8	16.8x	2.7x
Treasury Bond**	1,978	1,979	-1.41	-0.07%	236	3,185,163	48.0%	1.4	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
SPCL	44.2	+10.0%	128.1	NM	1.1x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	SPCL	44.2	+10.0%	128.1	NM	1.1x
NURANI	3.3	+6.5%	0.3	NM	0.4x	ISLAMIBANK	74,730	5.3%	12.9x	0.8x	BSC	95.7	+1.7%	122.9	5.0x	1.0x
DOREENPWR	25.2	+5.4%	39.2	25.5x	0.5x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	18.0	-5.8%	93.9	10.4x	1.3x
RUNNERAUTO	30.4	+4.8%	39.6	23.2x	0.5x	BATBC	50,233	3.6%	10.0x	3.0x	SPCERAMICS	23.0	-2.5%	74.3	NM	0.8x
SSSTEEL	6.8	+4.6%	3.2	32.4x	0.3x	WALTONHIL	46,773	3.3%	10.4x	1.2x	AIL	47.7	-3.2%	59.2	17.9x	2.1x
EPGL	20.5	+4.59%	22.5	NM	0.6x	BRACBANK	46,489	3.3%	8.0x	1.2x	BRACBANK	50.1	+1.0%	55.4	8.0x	1.2x
ALARABANK	23.0	+4.5%	0.5	15.0x	1x	GP	44,708	3.2%	11.9x	6.7x	FINEFOODS	202.3	+0.8%	52.8	87.6x	16.5x
PLFSL	2.3	+4.5%	0.1	NM	NM	RENATA	32,968	2.3%	19.2x	1.7x	UTTARABANK	19.9	-0.5%	49.8	7.4x	0.7x
NFML	9.4	+4.4%	2.1	NM	0.9x	BXPHARMA	23,409	1.7%	6.7x	0.9x	BXPHARMA	95.5	+0.7%	46.6	6.7x	0.9x
PTL	45.9	+4.1%	12.7	8.0x	1.2x	PUBALIBANK	22,905	1.6%	3.3x	0.6x	SHAHJABANK	19.0	-	44.8	5.4x	0.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	4.2x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	64.4	-9.9%	33.6	18.9x	4.2x	LHB	20,953	1.5%	13.5x	2.8x	RENATA	497.0	497.0	1.0	50	24.85
ADNTEL	71.2	-8.6%	30.3	12.7x	2x	OLYMPIC	20,496	1.5%	16.8x	2.7x	SEMLLECMF	9.0	9.0	3.0	2,750	24.75
HEIDELBCEM	245.2	-8.1%	24.9	37.7x	3.4x	ALARABANK	18,282	1.3%	15.0x	1.1x	CENTRALINS	35.0	35.0	2.0	450	15.75
KPPL	20.6	-8.0%	20.2	NM	NM	BEACONPHAR	17,838	1.3%	47.4x	4.2x	BEACHHATCH	71.5	64.4	7.0	102	6.70
PROGRESLIF	62.7	-7.9%	8.9	NM	NM	PRIMEBANK	16,142	1.1%	3.5x	0.7x	SAIHAMTEX	14.9	14.9	1.0	367	5.47
ABB1STMF	4.8	-7.7%	43.8	NM	0.5x	ROBI	14,876	1.1%	19.0x	1.9x	EBL1STMF	5.7	5.7	4.0	900	5.13
BIFC	6.7	-6.9%	0.5	NM	NM	UTTARABANK	13,699	1.0%	7.4x	0.7x	JAMUNABANK	20.2	20.2	2.0	250	5.05
ECABLES	110.5	-6.6%	4.2	NM	0.3x	NBL	13,055	0.9%	NM	2.1x	KBPWBIL	119.9	110.0	3.0	30	3.41
SHARPIND	18.2	-6.2%	6.7	28.0x	1.7x	BSRMLTD	12,852	0.9%	4.9x	0.5x	BRACBANK	54.5	54.5	1.0	60	3.27
PREMIERLEA	3.1	-6.1%	0.2	NM	NM	* 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					PREMIERCEM	55.0	54.0	4.0	52	2.82

\* 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	497.0	497.0	24.9	50	1
SEMLLECMF	9.0	9.0	24.8	2,750	3
CENTRALINS	35.0	35.0	15.8	450	2
BEACHHATCH	71.5	64.4	6.7	102	7
SAIHAMTEX	14.9	14.9	5.5	367	1
EBL1STMF	5.7	5.7	5.1	900	4
JAMUNABANK	20.2	20.2	5.1	250	2
KBPPWBIL	119.9	110.0	3.4	30	3
BRACBANK	54.5	54.5	3.3	60	1
PREMIERCEM	55.0	54.0	2.8	52	4
FINEFOODS	197.3	195.0	2.6	13	3
BNICL	44.0	44.0	2.2	50	1
CAPMBDBLMF	9.1	9.1	1.0	112	2
ECABLES	122.0	122.0	0.9	7	1
SIBL	9.6	9.6	0.7	70	1
BATASHOE	750.0	750.0	0.6	1	1
RELIANCINS	55.6	55.6	0.6	11	1
ASIATICLAB	34.7	34.7	0.6	17	1
RUPALILIFE	91.1	91.1	0.6	6	1
SUNLIFEINS	68.5	68.5	0.5	7	1
CLICL	50.3	50.3	0.5	10	1
LOVELLO	76.0	76.0	0.5	7	1
<b>Total</b>			<b>110.0</b>		<b>46</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BNICL		0.0%	20.0%	Record Date	20-May-25
BATASHOE		0.0%	105.0%	Record Date	26-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

##### BNICL

The Board of Directors has recommended 20% Cash Dividend for the year ended December 31, 2024. Date of AGM: 24.06.2025, Time: 12:00 PM, Venue: Digital Platform. Record Date: 20.05.2025. The Company has also reported EPS of Tk. 4.19, NAV per share of Tk. 28.45 and NOCFPS of Tk. 6.71 for the year ended December 31, 2024 as against Tk. 4.04, Tk. 26.28 and Tk. 4.23 respectively for the year ended December 31, 2023.

##### BATASHOE

The Board of Directors has recommended 105% Final Cash Dividend for the year ended December 31, 2024. Date of AGM: 26.06.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 26.05.2025. The Company has also reported EPS of Tk. 21.62, NAV per share of Tk. 220.22 and NOCFPS of Tk. 71.42 for the year ended December 31, 2024 as against Tk. 29.31, Tk. 237.93 and Tk. 93.80 respectively for the year ended December 31, 2023.

##### HFL

**(Q2 Un-audited):** EPS was Tk. (1.80) for October-December 2024 as against Tk. (0.32) for October-December 2023; EPS was Tk. (2.86) for July-December 2024 as against Tk. (0.21) for July-December 2023. NOCFPS was Tk. 0.70 for July-December 2024 as against Tk. (2.51) for July-December 2023. NAV per share was Tk. 30.81 as on December 31, 2024 and Tk. 33.66 as on June 30, 2024.

##### BDLAMPS

**(Q3 Un-audited):** EPS was Tk. 0.11 for January-March 2025 as against Tk. (1.36) (restated) for January-March 2024; EPS was Tk. (5.46) for July 2024-March 2025 as against Tk. (12.06) (restated) for July 2023-March 2024. NOCFPS was Tk. (17.32) for July 2024-March 2025 as against Tk. (6.58) (restated) for July 2023-March 2024. NAV per share was Tk. 44.24 as on March 31, 2025 and Tk. 56.94 (restated) as on March 31, 2024.

##### ALARABANK

The company has informed that the Board of Directors has appointed Mr. Md. Rafat Ullah Khan as the Managing Director (Current Charge) of the company with effect from April 13, 2025.

##### CROWNCEMNT

The company has informed that Mr. Md. Alamgir Kabir, a Sponsor Director of the company, has transferred 2,970,000 shares of the company to his son Mr. Solaiman Kabir; 1,500,000 shares of the company to his spouse Ms. Kamrun Nahar; 500,000 shares of the company to his daughter Ms. Raisa Kabir; 500,000 shares of the company to his son Mr. Raihanul Kabir and 500,000 shares of the company to his daughter Ms. Nusaibah Kabir as per declaration disseminated by DSE 15.04.2025.

The company has informed that Mr. Md. Mizanur Rahman Mollah, a Sponsor Director of the company, has transferred 3,000,000 shares of the company to his spouse Mrs. Anowara Rahman and 3,000,000 shares of the company to his daughter Ms. Mushsharat Mahajabin as per declaration disseminated by DSE 20.04.2025.

The company has informed that Mr. Mollah Mohammad Majnu, a Sponsor Director of the company, has transferred 3,000,000 shares of the company to his son Mr. Atiq Murshed as per declaration disseminated by DSE 20.04.2025.

The company has informed that Mr. Mohammed Jahangir Alam, a Sponsor Director of the company, has transferred 1,500,000 shares of the company to his spouse Ms. Masuma Begum; 1,500,000 shares of the company to his daughter Ms. Sadman Syka Sefa and 1,500,000 shares of the company to his son Mr. Salehin Musfique Sadaf as per declaration disseminated by DSE 15.04.2025 and 16.04.2025.

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**MTB**

Mr. Syed Manzur Elahi, one of the Sponsors of the company passed away on 12.03.2025. The company has informed that his holding of 31,266,321 shares (out of his total holding of 34,329,953 shares) will be transmitted to the account of his nominees i. Mr. Syed Nasim Manzur (Son), a Placement Holder of the company and ii. Ms. Munize Manzur (daughter), a Sponsor & former Director of the company, in equal proportions, with each receiving 50% of the shares.

**MEGHNALIFE**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Meghna Life Insurance PLC' instead of 'Meghna Life Insurance Co. Ltd.' with effect from April 24, 2025. Other things (except name) will remain unchanged.

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