

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.46%) gained 22.87 points and closed at 4,995.47. The blue-chip index DS30 (+0.41%), the Shariah-based index DSES (+0.30%), and the large-cap index CDSET (+0.07%) closed at 1,852.48, 1,108.02, and 1,023.51 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 0.91%, followed by Bank (+0.80%), Pharmaceutical (+0.77%), Engineering (+0.57%), Fuel & Power (-0.05%), Food & Allied (-0.39%), and Telecommunication (-2.90%), respectively. Block trades contributed 2.8% of the overall market turnover. Beach Hatchery Ltd. (+1.7%) was the most traded share with a turnover of BDT 175 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,995.47	4,972.60	+22.87	+0.46%	-4.2%
DS30	1,852.48	1,845.01	+7.48	+0.41%	-4.5%
DSES	1,108.02	1,104.70	+3.32	+0.30%	-5.2%
CDSET	1,023.51	1,022.84	+0.67	+0.07%	-4.0%

	Advanced	Declined	Unchanged	Total
All Category	235	100	62	397
A Category (Equity)	119	65	34	218
B Category (Equity)	66	11	7	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	50	24	21	95
Mutual Funds	14	9	13	36
Corporate Bonds	0	1	0	1
Treasury Bonds	0	2	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,638,458	6,634,501	+0.1%
	Mn USD	54,414	54,381	
Turnover	Mn BDT	3,386	3,671	-7.8%
	Mn USD	28	30	
Volume	Mn Shares	136	135	+0.6%
No. of Trade		132,836	138,626	-4.2%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 27, 2025

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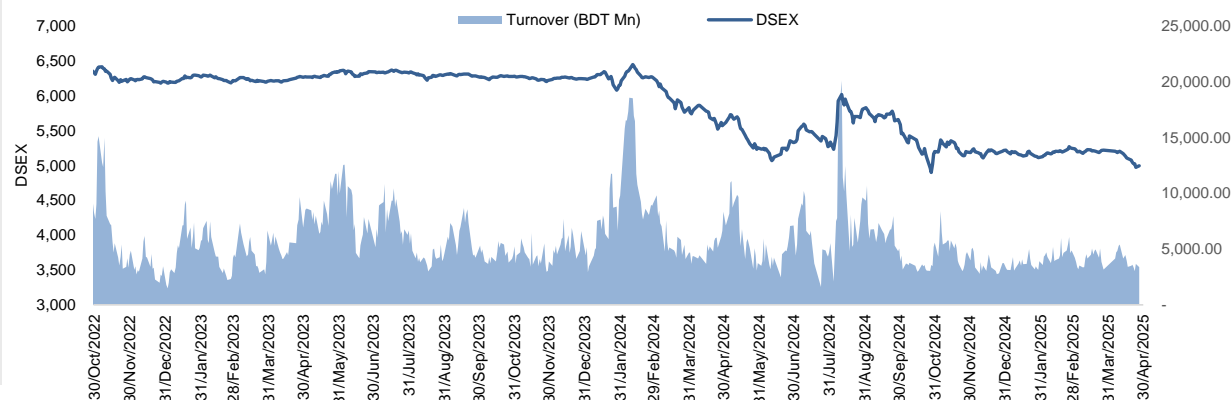


Figure: Sectorial Turnover (BDT Mn)

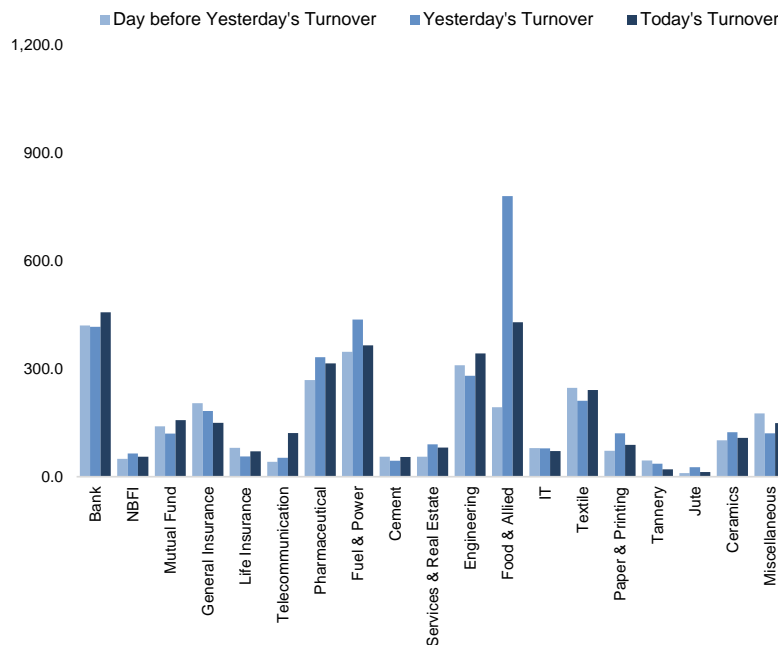
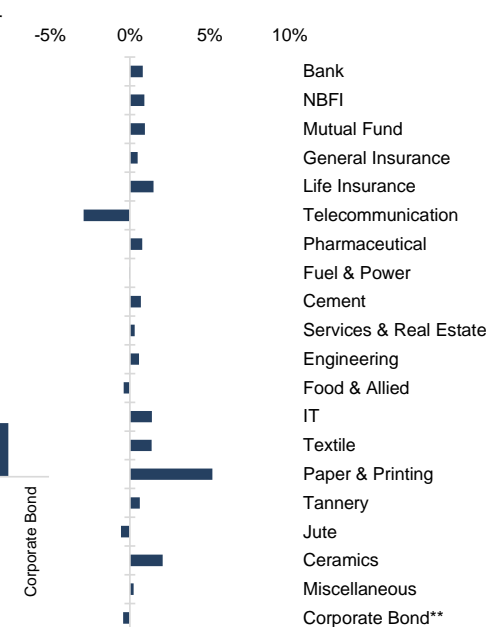


Figure: Sectorial Mcap Change



Market PE 14.9x

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	1,345	1,334	+10.70	+0.80%	36	636,164	9.6%	456.8	13.9%	8.0x	0.7x	GP	415,622	12.2%	87.3	14.2x	5.8x
NBFI	1,004	995	+9.09	+0.91%	23	95,652	1.4%	55.6	1.7%	NM	NM	SQURPHARMA	191,739	5.6%	18.5	8.6x	1.5x
Mutual Fund	612	606	+5.72	+0.94%	37	28,125	0.4%	157.0	4.8%	NM	0.5x	BATBC	171,774	5.0%	22.3	9.8x	3.0x
General Insurance	2,515	2,502	+12.12	+0.48%	43	71,783	1.1%	149.9	4.6%	12.6x	1.1x	WALTONHIL	136,287	4.0%	2.8	10.3x	1.2x
Life Insurance	1,655	1,631	+24.27	+1.49%	15	44,013	0.7%	70.3	2.1%	NM	NM	ROBI	132,520	3.9%	27.4	18.9x	1.9x
Telecommunication	4,875	5,021	-145.45	-2.90%	3	571,672	8.6%	121.2	3.7%	15.2x	3.7x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,882	2,860	+21.96	+0.77%	34	546,384	8.2%	314.9	9.6%	13.0x	1.5x	BRACBANK	88,663	2.6%	18.5	8.0x	1.2x
Fuel & Power	1,102	1,103	-0.50	-0.05%	23	291,934	4.4%	364.6	11.1%	15.5x	0.6x	BERGERPBL	83,313	2.4%	0.7	24.3x	5.7x
Cement	1,758	1,746	+12.00	+0.69%	7	83,767	1.3%	54.5	1.7%	16.9x	1.9x	MARICO	77,421	2.3%	6.7	13.8x	10.2x
Services & Real Estate	952	949	+2.79	+0.29%	9	52,357	0.8%	80.9	2.5%	18.7x	0.4x	UPGDCL	68,752	2.0%	3.9	6.5x	1.8x
Engineering	2,376	2,362	+13.35	+0.57%	42	268,008	4.0%	342.2	10.4%	12.3x	0.8x	RENATA	56,499	1.7%	3.9	19.1x	1.7x
Food & Allied	15,292	15,353	-60.52	-0.39%	21	279,811	4.2%	429.2	13.0%	15.3x	4.2x	LHB	52,726	1.5%	24.2	13.8x	2.8x
IT	1,746	1,722	+23.62	+1.37%	11	23,024	0.3%	71.6	2.2%	18.1x	1.5x	UNILEVERCL	45,688	1.3%	0.1	68.5x	18.7x
Textile	1,036	1,022	+13.85	+1.35%	58	107,902	1.6%	240.5	7.3%	78.8x	0.7x	DUTCHBANGL	42,008	1.2%	5.5	6.7x	0.9x
Paper & Printing	4,194	3,988	+205.88	+5.16%	6	18,948	0.3%	88.4	2.7%	NM	0.9x	BXPHARMA	41,890	1.2%	47.8	6.5x	0.8x
Tannery	1,844	1,833	+11.43	+0.62%	6	20,549	0.3%	20.7	0.6%	91.6x	1.5x	ICB	41,802	1.2%	3.1	33.0x	1.0x
Jute	10,687	10,747	-59.51	-0.55%	3	2,353	0.0%	13.2	0.4%	NM	NM	EBL	34,310	1.0%	23.9	5.2x	0.8x
Ceramics	395	387	+7.98	+2.06%	5	17,740	0.3%	107.9	3.3%	NM	1.1x	POWERGRID	33,171	1.0%	3.2	NM	0.3x
Miscellaneous	4,183	4,174	+9.69	+0.23%	15	227,165	3.4%	149.1	4.5%	93.5x	1.9x	PUBALIBANK	32,044	0.9%	10.6	3.3x	0.6x
Corporate Bond**	15,420	15,485	-64.60	-0.42%	16	33,772	0.5%	1.4	0.0%	NM	NM	CITYBANK	31,101	0.9%	47.1	4.3x	0.8x
Treasury Bond**	1,992	1,970	+22.25	+1.13%	236	3,216,862	48.5%	1.5	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
BPML	36.3	+10.0%	17.5	NM	0.5x	SQURPHARMA	108,958	7.7%	8.6x	1.5x	BEACHHATCH	59.3	+1.7%	175.2	17.4x	3.9x
KPPL	20.4	+9.7%	20.8	NM	NM	ISLAMIBANK	74,730	5.3%	12.2x	0.8x	MIDLANDBNK	19.4	+9.6%	124.5	11.2x	1.3x
SALAMCRST	21.6	+9.6%	27.4	NM	1.2x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCL	44.0	-0.9%	108.8	NM	1.1x
ETL	9.1	+9.6%	12.3	34.9x	0.7x	BATBC	50,233	3.6%	9.8x	3.0x	LOVELLO	81.5	+1.5%	102.2	36.7x	6.5x
MIDLANDBNK	19.4	+9.6%	124.5	11.2x	1.3x	WALTONHIL	46,773	3.3%	10.3x	1.2x	GP	307.8	-4.0%	87.3	14.2x	5.8x
SPCERAMICS	23.6	+9.26%	72.6	NM	0.8x	BRACBANK	46,489	3.3%	8.0x	1.2x	BSC	93.9	+1.6%	80.7	4.9x	1.0x
KEYACOSMET	4.8	+9.1%	8.1	NM	0x	GP	44,708	3.2%	14.2x	5.8x	MIRAKHTER	27.2	-6.5%	77.2	13.4x	0.5x
RELIANCE1	21.9	+9.0%	57.7	NM	2.0x	RENATA	32,968	2.3%	19.1x	1.7x	SPCERAMICS	23.6	+9.3%	72.6	NM	0.8x
KTL	11.1	+8.8%	12.0	NM	0.7x	BXPHARMA	23,409	1.7%	6.5x	0.8x	FINEFOODS	203.3	+0.1%	60.8	45.8x	13.9x
CENTRALPHL	10.9	+7.9%	9.6	NM	1.6x	PUBALIBANK	22,905	1.6%	3.3x	0.6x	RELIANCE1	21.9	+9.0%	57.7	NM	2.0x
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)
STANCERAM	58.1	-8.9%	0.7	NM	NM	LHB	20,953	1.5%	13.8x	2.8x	LOVELLO	79.5	77.0	4.0	512	40.67
DESCO	25.0	-8.1%	15.3	NM	1x	OLYMPIC	20,496	1.5%	16.5x	2.6x	RELIANCE1	21.0	20.5	9.0	731	15.11
MIRAKHTER	27.2	-6.5%	77.2	13.4x	0.5x	ALARABANK	18,282	1.3%	14.5x	1.0x	UTTARABANK	21.6	21.6	1.0	600	12.96
ANLIMAYARN	22.4	-5.1%	0.3	NM	3.6x	BEACONPHAR	17,838	1.3%	46.7x	4.1x	FINEFOODS	202.0	199.0	2.0	34	6.86
PROGRESLIF	57.5	-4.3%	2.7	NM	NM	PRIMEBANK	16,142	1.1%	3.2x	0.7x	SPCL	45.0	45.0	4.0	60	2.70
PRIME1ICBA	4.7	-4.1%	0.6	NM	0.8x	ROBI	14,876	1.1%	18.9x	1.9x	RENATA	535.7	535.7	1.0	5	2.68
ICBEPMF1S1	4.8	-4.0%	0.0	NM	0.9x	UTTARABANK	13,699	1.0%	7.4x	0.7x	KAY&QUE	222.3	222.2	2.0	11	2.36
GP	307.8	-4.0%	87.3	14.2x	5.8x	NBL	13,055	0.9%	NM	2.1x	BEXIMCO	99.1	99.1	4.0	20	2.01
EGEN	19.8	-3.9%	13.2	24.8x	0.9x	BSRMLTD	12,852	0.9%	4.9x	0.5x	ABB1STMF	5.0	4.6	2.0	400	1.88
BDWELDING	10.0	-3.8%	0.3	NM	0.9x	* 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										

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** 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
LOVELLO	79.5	77.0	40.7	512	4
RELIANCE1	21.0	20.5	15.1	731	9
UTTARABANK	21.6	21.6	13.0	600	1
FINEFOODS	202.0	199.0	6.9	34	2
SPCL	45.0	45.0	2.7	60	4
RENATA	535.7	535.7	2.7	5	1
KAY&QUE	222.3	222.2	2.4	11	2
BEXIMCO	99.1	99.1	2.0	20	4
ABB1STMF	5.0	4.6	1.9	400	2
BEACHHATCH	55.0	55.0	1.4	25	1
BATASHOE	846.8	846.8	1.3	2	1
ASIATICLAB	31.0	31.0	1.1	37	1
REPUBLIC	30.4	30.4	1.0	32	1
MITHUNKNIT	16.0	16.0	0.7	44	1
SIBL	9.8	9.8	0.7	70	1
AL-HAJTEX	118.0	118.0	0.6	5	1
HAKKANIPUL	47.0	47.0	0.6	12	1
SQURPHARMA	225.0	225.0	0.5	2	1
Total			95.1		38

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
HEIDELBCEM		0.0%	25.0%	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
RUPALIINS		0.0%	10.0%	Record Date	29-May-25
EASTLAND		0.0%	10.0%	Record Date	2-Jun-25

Important DSE News

MIRAKHTER

(Q3 Un-audited): Consolidated EPS was Tk. 0.27 for January-March 2025 as against Tk. 0.69 for January-March 2024; Consolidated EPS was Tk. 1.00 for July 2024-March 2025 as against Tk. 1.51 for July 2023-March 2024. Consolidated NOCFPS was Tk. 7.15 for July 2024-March 2025 as against Tk. 6.66 for July 2023-March 2024. Consolidated NAV per share was Tk. 50.97 as on March 31, 2025 and Tk. 50.99 as on June 30, 2024.

DSSL

(Q3 Un-audited): EPS was Tk. 0.02 for January-March 2025 as against Tk. 0.03 for January-March 2024; EPS was Tk. 0.37 for July 2024-March 2025 as against Tk. 0.20 for July 2023-March 2024. NOCFPS was Tk. 0.17 for July 2024-March 2025 as against Tk. 0.00 for July 2023-March 2024. NAV per share was Tk. 18.41 as on March 31, 2025 and Tk. 18.12 as on June 30, 2024.

COPPERTECH

(Q3 Un-audited): EPS was Tk. 0.22 for January-March 2025 as against Tk. 0.24 for January-March 2024; EPS was Tk. 0.44 for July 2024-March 2025 as against Tk. 0.51 for July 2023-March 2024. NOCFPS was Tk. 1.86 for July 2024-March 2025 as against Tk. 1.23 for July 2023-March 2024. NAV per share was Tk. 14.05 as on March 31, 2025 and Tk. 13.89 as on June 30, 2024.

RUNNERAUTO

(Q3 Un-audited): Consolidated EPS was Tk. 0.43 for January-March 2025 as against Tk. (1.35) for January-March 2024; Consolidated EPS was Tk. 0.07 for July 2024-March 2025 as against Tk. (3.57) for July 2023-March 2024. Consolidated NOCFPS was Tk. 14.28 for July 2024-March 2025 as against Tk. 13.18 for July 2023-March 2024. Consolidated NAV per share was Tk. 65.96 as on March 31, 2025 and Tk. 66.49 as on June 30, 2024.

HEIDELBCEM

(Q1 Un-audited): EPS was Tk. 3.48 for January-March 2025 as against Tk. 6.96 for January-March 2024. NOCFPS was Tk. (2.97) for January-March 2025 as against Tk. 23.00 for January-March 2024. NAV per share was Tk. 76.35 as on March 31, 2025 and Tk. 72.87 as on December 31, 2024.

DESCO

(Q3 Un-audited): EPS was Tk. (1.83) for January-March 2025 as against Tk. (1.89) for January-March 2024; EPS was Tk. (1.98) for July 2024-March 2025 as against Tk. (6.81) for July 2023-March 2024. NOCFPS was Tk. 8.98 for July 2024-March 2025 as against Tk. 1.99 for July 2023-March 2024. NAV per share was Tk. 36.16 as on March 31, 2025 and Tk. 37.92 as on June 30, 2024

GP

(Q1 Un-audited): EPS was Tk. 4.69 for January-March 2025 as against Tk. 9.91 for January-March 2024. NOCFPS was Tk. 14.11 for January-March 2025 as against Tk. 12.95 for January-March 2024. NAV per share was Tk. 52.64 as on March 31, 2025 and Tk. 59.30 as on March 31, 2024.

The company has informed that the Board of Directors has elected Mr. Jon Omund Revhaug as the Chairman of the Board of Directors of the company with effect from April 24, 2025.

ETL

(Q3 Un-audited): EPS was Tk. 0.10 for January-March 2025 as against Tk. 0.07 for January-March 2024; EPS was Tk. (0.12) for July 2024-March 2025 as against Tk. 0.19 for July 2023-March 2024. NOCFPS was Tk. 2.03 for July 2024-March 2025 as against Tk. (0.02) for July 2023-March 2024. NAV per share was Tk. 12.64 as on March 31, 2025 and Tk. 13.01 as on June 30, 2024.

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EGEN

(Q3 Un-audited): EPS was Tk. 0.18 for January-March 2025 as against Tk. 0.42 for January-March 2024; EPS was Tk. 0.58 for July 2024-March 2025 as against Tk. 1.22 for July 2023-March 2024. NOCFPS was Tk. 1.00 for July 2024-March 2025 as against Tk. 1.61 for July 2023-March 2024. NAV per share was Tk. 23.21 as on March 31, 2025 and Tk. 23.31 as on June 30, 2024.

The company has informed that the Board of Directors has appointed Mr. Abdullah Al Emran as the Managing Director of the company with effect from April 25, 2025.

The company has informed that the Board of Directors has appointed Mr. Ahsan H. Aminur as the Acting Company Secretary of the company with effect from May 01, 2025.

RANFOUNDRY

(Q3 Un-audited): EPS was Tk. 0.99 for January-March 2025 as against Tk. 0.90 for January-March 2024; EPS was Tk. 3.17 for July 2024-March 2025 as against Tk. 3.07 for July 2023-March 2024. NOCFPS was Tk. (2.52) for July 2024-March 2025 as against Tk. 2.84 for July 2023-March 2024. NAV per share was Tk. 34.41 as on March 31, 2025 and Tk. 33.54 as on June 30, 2024.

ANLIMAYARN

(Q3 Un-audited): EPS was Tk. (1.12) for January-March 2025 as against Tk. (0.67) for January-March 2024; EPS was Tk. (2.36) for July 2024-March 2025 as against Tk. (0.73) for July 2023-March 2024. NOCFPS was Tk. (0.98) for July 2024-March 2025 as against Tk. 0.15 for July 2023-March 2024. NAV per share was Tk. 6.26 as on March 31, 2025 and Tk. 8.62 as on June 30, 2024.

PADMAOIL

(Q3 Un-audited): EPS was Tk. 14.80 for January-March 2025 as against Tk. 8.35 for January-March 2024; EPS was Tk. 40.20 for July 2024-March 2025 as against Tk. 24.88 for July 2023-March 2024. NOCFPS was Tk. (27.21) for July 2024-March 2025 as against Tk. 3.08 for July 2023-March 2024. NAV per share was Tk. 257.75 as on March 31, 2025 and Tk. 231.56 as on June 30, 2024. The change in NOCFPS is due to increase of due from affiliated companies and accounts receivable.

AMCL(PRAN)

(Q3 Un-audited): EPS was Tk. 1.37 for January-March 2025 as against Tk. 1.46 for January-March 2024; EPS was Tk. 4.93 for July 2024-March 2025 as against Tk. 4.98 for July 2023-March 2024. NOCFPS was Tk. (6.10) for July 2024-March 2025 as against Tk. 16.39 for July 2023-March 2024. NAV per share was Tk. 92.63 as on March 31, 2025 and Tk. 90.90 as on June 30, 2024.

SINGERBD

(Q1 Un-audited): EPS was Tk. (3.50) for January-March 2025 as against Tk. (0.21) for January-March 2024; NOCFPS was Tk. 4.79 for January-March 2025 as against Tk. (3.84) for January-March 2024. NAV per share was Tk. 21.31 as on March 31, 2025 and Tk. 25.81 as on December 31, 2024.

ARGONDENIM

(Q3 Un-audited): EPS was Tk. 0.40 for January-March 2025 as against Tk. 0.14 for January-March 2024; EPS was Tk. 1.42 for July 2024-March 2025 as against Tk. 0.57 for July 2023-March 2024. NOCFPS was Tk. 1.02 for July 2024-March 2025 as against Tk. 4.82 for July 2023-March 2024. NAV per share was Tk. 24.31 as on March 31, 2025 and Tk. 23.89 as on June 30, 2024.

PRIMEBANK

(Q1 Un-audited): Consolidated EPS was Tk. 1.85 for January-March 2025 as against Tk. 1.16 for January-March 2024; Consolidated NOCFPS was Tk. 13.43 for January-March 2025 as against Tk. (1.19) for January-March 2024. Consolidated NAV per share was Tk. 34.44 as on March 31, 2025 and Tk. 30.72 as on March 31, 2024.

FEDERALINS

The Company has informed that Mr. Md. Sabirul Hoque, one of the Sponsors of the company, passed away on 16.01.2025. His total holding of 1,431,365 shares of the company will be transmitted to the account of his nominee Mr. Rakibul Hoque (son of Late Md. Sabirul Hoque) by way of nomination.

SHASHADNIM

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Shasha Denims PLC.' instead of 'Shasha Denims Ltd.' with effect from April 28, 2025. Other information (except name) will remain unchanged.

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