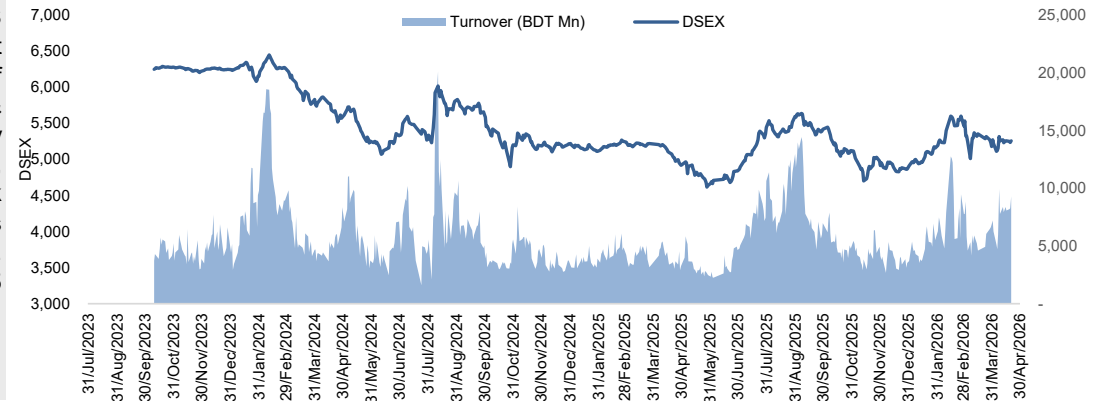


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.48%) gained 24.92 points and closed at 5,257.41. The blue-chip index DS30 (+0.21%), the Shariah-based index DSES (+0.28%), and the large-cap index CDSET (+0.02%) closed at 1,984.18, 1,062.65, and 1,061.21 points, respectively. Most of the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 0.40% followed by Pharmaceutical (+0.35%), Engineering (+0.28%), Telecommunication (+0.18%), Food & Allied (+0.17%), Bank (+0.15%), and NBFI (-0.14%), respectively. Block trades contributed 3.2% of the overall market turnover. City Bank PLC. (-0.6%) was the most traded share with a turnover of BDT 265 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
<b>DSEX</b>	5,257.41	5,232.49	+24.92	+0.48%	+8.1%
<b>DS30</b>	1,984.18	1,980.01	+4.17	+0.21%	+7.0%
<b>DSES</b>	1,062.65	1,059.70	+2.95	+0.28%	+6.2%
<b>CDSET</b>	1,061.21	1,060.98	+0.23	+0.02%	+5.6%

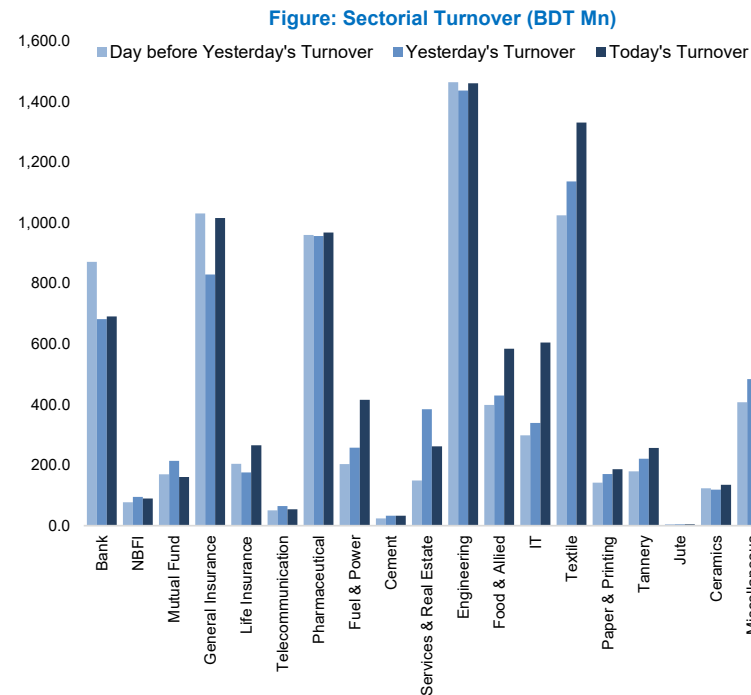
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	215	108	66	389
<b>A Category (Equity)</b>	125	49	28	202
<b>B Category (Equity)</b>	52	19	9	80
<b>N Category (Equity)</b>	0	0	0	0
<b>Z Category (Equity)</b>	38	40	29	107
<b>Mutual Funds</b>	7	11	15	33
<b>Corporate Bonds</b>	1	1	2	4
<b>Treasury Bonds</b>	2	0	0	2

\* Based on Traded Scrips

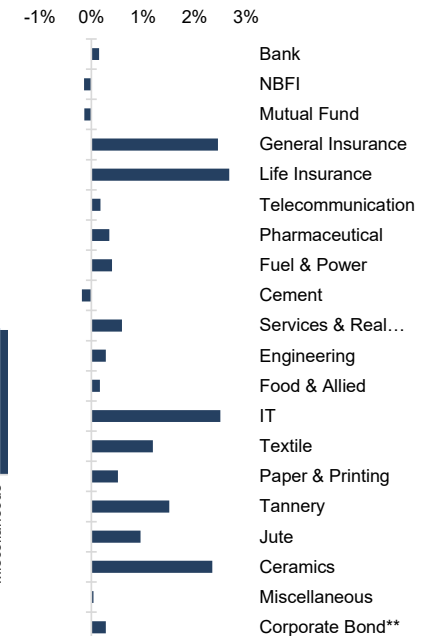
		Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT	6,835,972	6,816,224	+0.3%
	Mn USD	55,646	55,486	
<b>Turnover</b>	Mn BDT	9,293	8,248	+12.7%
	Mn USD	76	67	
<b>Volume</b>	Mn Shares	314	296	+6.1%
<b>No. of Trade</b>		246,621	223,903	+10.1%

\* Average Interbank Exchange Rate is BDT 122.85 as of Apr 21, 2026

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Tasviha Taher Trishila</b> Research Associate (880) 1730701733 tasviha.trishila@bracepl.com
---	---



**Figure: Sectorial Mcap Change**



**Market PE** 14.9x

**Market PB** 1.6x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFI and Banks

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	1,533	1,531	+2.29	+0.15%	36	715,706	10.5%	690.4	7.7%	9.5x	0.7x	GP	326,097	9.6%	17.8	11.0x	5.8x
NBFI	961	962	-1.37	-0.14%	23	90,842	1.3%	89.7	1.0%	NM	0.9x	SQRPHARMA	187,307	5.5%	34.6	7.2x	1.3x
Mutual Fund	532	533	-0.72	-0.14%	36	25,625	0.4%	160.7	1.8%	NM	0.5x	ROBI	148,757	4.4%	33.5	15.9x	2.1x
General Insurance	3,438	3,356	+82.48	+2.46%	43	97,062	1.4%	1,015.5	11.3%	15.6x	1.4x	BRACBANK	143,546	4.2%	47.6	9.1x	1.4x
Life Insurance	1,757	1,711	+45.82	+2.68%	15	49,528	0.7%	264.9	2.9%	NM	NM	WALTONHIL	123,992	3.6%	12.5	11.1x	1.0x
Telecommunication	4,315	4,308	+7.63	+0.18%	3	500,722	7.3%	53.8	0.6%	12.1x	3.5x	BATBC	116,910	3.4%	27.4	20.0x	2.1x
Pharmaceutical	2,973	2,963	+10.30	+0.35%	34	561,206	8.2%	967.4	10.8%	11.7x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,036	1,032	+4.16	+0.40%	23	273,497	4.0%	414.9	4.6%	9.3x	0.6x	MARICO	86,241	2.5%	2.1	13.7x	29.7x
Cement	1,881	1,884	-3.48	-0.18%	7	88,483	1.3%	33.0	0.4%	17.4x	1.9x	BERGERPBL	68,110	2.0%	0.8	20.4x	3.6x
Services & Real Estate	1,025	1,019	+6.07	+0.60%	9	55,758	0.8%	262.1	2.9%	20.8x	0.4x	UPGDCL	67,708	2.0%	3.9	6.3x	1.5x
Engineering	2,480	2,473	+6.99	+0.28%	42	277,955	4.1%	1,460.0	16.2%	15.6x	0.8x	LHB	57,720	1.7%	13.8	11.3x	3.0x
Food & Allied	12,184	12,163	+20.53	+0.17%	21	222,423	3.3%	583.5	6.5%	31.2x	3.4x	BXPHARMA	52,641	1.5%	49.3	8.2x	1.1x
IT	2,086	2,035	+50.98	+2.51%	11	27,621	0.4%	604.2	6.7%	30.9x	1.7x	RENATA	47,599	1.4%	6.4	18.8x	1.3x
Textile	1,170	1,156	+13.78	+1.19%	58	121,678	1.8%	1,330.0	14.8%	NM	0.8x	CITYBANK	47,158	1.4%	264.9	3.6x	0.8x
Paper & Printing	4,548	4,524	+23.40	+0.52%	6	21,301	0.3%	186.2	2.1%	NM	1.3x	PUBALIBANK	46,461	1.4%	16.9	7.5x	0.6x
Tannery	2,029	1,998	+30.25	+1.51%	6	23,556	0.3%	256.1	2.8%	NM	1.4x	EBL	41,970	1.2%	96.5	5.0x	0.8x
Jute	10,408	10,310	+98.30	+0.95%	3	2,270	0.0%	4.8	0.1%	NM	NM	UNILEVERCL	39,915	1.2%	0.5	51.3x	16.9x
Ceramics	417	408	+9.56	+2.34%	5	18,858	0.3%	134.8	1.5%	NM	1.2x	DUTCHBANGL	37,895	1.1%	5.6	7.7x	0.7x
Miscellaneous	3,920	3,919	+1.55	+0.04%	15	212,879	3.1%	477.6	5.3%	89.7x	1.6x	PRIMEBANK	37,487	1.1%	11.7	4.1x	0.8x
Corporate Bond**	17,683	17,634	+49.69	+0.28%	16	39,020	0.6%	2.0	0.0%	NM	NM	ICB	31,742	0.9%	2.4	NM	1.1x
Treasury Bond**	2,222	2,218	+4.42	+0.20%	232	3,413,415	49.9%	0.6	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
BDLAMPS	182.4	+9.9%	43.7	NM	3.9x	SQRPHARMA	104,611	7.2%	7.2x	1.3x	CITYBANK	31.0	-0.6%	264.9	3.6x	0.8x
NAHEEACP	26.6	+9.9%	27.6	NM	2.2x	BRACBANK	77,271	5.3%	9.1x	1.4x	ACMEPL	26.3	-3.3%	234.4	NM	1.6x
AGNISYSL	23.7	+9.7%	112.6	51.5x	1.4x	BEXIMCO	69,465	4.8%	NM	1.3x	DOMINAGE	56.2	+0.7%	220.2	NM	3.3x
SAMATALETH	95.8	+9.1%	36.1	NM	6.7x	ISLAMIBANK	58,177	4.0%	NM	0.8x	SAPORTL	52.2	+0.4%	208.3	22.9x	1.5x
RINGSHINE	3.7	+8.8%	6.4	NM	NM	WALTONHIL	40,806	2.8%	11.1x	1.0x	KBPPWBIL	49.6	-2.0%	208.1	88.6x	4.2x
APEXSPINN	307.9	+8.72%	114.7	93.6x	3.7x	BXPHARMA	36,780	2.5%	8.2x	1.1x	SIMTEX	25.4	+5.0%	195.7	23.3x	1.1x
PRAGATILIF	198.6	+8.6%	70.3	NM	NM	PUBALIBANK	33,359	2.3%	7.5x	0.6x	PTL	62.5	-0.2%	191.4	9.9x	1.4x
PEOPLESINS	51.5	+8.4%	107.8	14.2x	1.4x	CITYBANK	32,836	2.3%	3.6x	0.8x	RUNNERAUTO	44.0	+4.3%	175.8	28.8x	0.7x
APEXFOODS	264.3	+8.0%	61.9	37.5x	1.7x	GP	32,610	2.2%	11.0x	5.8x	LOVELLO	80.0	+3.4%	172.9	34.3x	6.4x
PHENIXINS	39.9	+7.8%	55.8	21.0x	1.2x	BATBC	30,923	2.1%	20.0x	2.1x	SPCL	52.5	-1.1%	158.1	10.4x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ILFSL	2.4	-7.7%	7.2	NM	NM	CITYGENINS	100.6	91.2	10.0	504	50.07
PREMIERLEA	2.4	-7.7%	1.7	NM	NM	APEXSPINN	300.2	290.0	11.0	163	48.52
FASFIN	2.6	-6.9%	14.2	NM	NM	ASIATICLAB	96.2	90.0	9.0	499	47.12
PLFSL	2.7	-6.9%	14.2	NM	NM	SUNLIFEINS	74.5	67.0	5.0	501	34.70
IFIC1STMF	3.7	-5.1%	8.7	NM	0.4x	DOMINAGE	55.0	54.8	3.0	452	24.85
GSPFINANCE	4.2	-4.5%	2.0	NM	NM	DAFODILCOM	105.0	101.0	13.0	204	21.09
FAREASTFIN	2.5	-3.8%	4.9	NM	NM	SHYAMPSUG	164.0	163.5	12.0	65	10.68
MEGCONMILK	33.8	-3.7%	9.2	NM	NM	BDLAMPS	150.2	150.0	5.0	35	5.33
ACMEPL	26.3	-3.3%	234.4	NM	1.6x	SAIHAMCOT	21.0	20.5	2.0	228	4.72
SHURWID	6.1	-3.2%	1.4	NM	0.5x	LOVELLO	74.0	72.0	2.0	52	3.76

\*. Bank and NBFI sector PE calculation methodology has been modified.  
 \*\* 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
CITYGENINS	100.6	91.2	50.1	504	10
APEXSPINN	300.2	290.0	48.5	163	11
ASIATICLAB	96.2	90.0	47.1	499	9
SUNLIFEINS	74.5	67.0	34.7	501	5
DOMINAGE	55.0	54.8	24.8	452	3
DAFODILCOM	105.0	101.0	21.1	204	13
SHYAMPSUG	164.0	163.5	10.7	65	12
BDLAMPS	150.2	150.0	5.3	35	5
SAIHAMCOT	21.0	20.5	4.7	228	2
LOVELLO	74.0	72.0	3.8	52	2
CAPMBDBLMF	12.5	12.5	3.8	300	2
KBPPWBIL	51.5	46.8	3.6	73	4
CENTRALINS	42.5	42.5	3.0	72	3
TECHNODRUG	38.0	38.0	3.0	80	3
PTL	68.7	59.9	3.0	48	3
SLIPLC	68.2	68.2	2.7	39	2
NLTUBES	66.0	66.0	2.6	40	1
ROBI	31.0	31.0	1.9	63	1
BENGALWTL	23.0	23.0	1.9	81	2
NAVANAPHAR	60.9	60.9	1.8	30	1
SHAHJABANK	15.7	15.7	1.8	115	1
PRAGATIINS	72.0	72.0	1.8	25	1
<b>Total</b>			<b>300.4</b>		<b>117</b>

**Important DSE News**

**SPCL**

(Q3 Un-audited): Consolidated EPS was Tk. 1.32 for January-March 2026 as against Tk. 0.37 for January-March 2025; Consolidated EPS was Tk. 4.37 for July 2025-March 2026 as against Tk. 1.83 for July 2024-March 2025. Consolidated NOCFPS was Tk. 4.50 for July 2025-March 2026 as against Tk. 1.99 for July 2024-March 2025. Consolidated NAV per share was Tk. 41.62 as on March 31, 2026 and Tk. 39.25 as on June 30, 2025.

**UNILEVERCL**

(Q1 Un-audited): EPS was Tk. 6.29 for January-March 2026 as against Tk. 7.16 for January-March 2025; NOCFPS was Tk. 10.74 for January-March 2026 as against Tk. (19.03) for January-March 2025. NAV per share was Tk. 122.58 as on March 31, 2026 and Tk. 116.30 as on December 31, 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PARAMOUNT		0.0%	10.0%	Record Date	21-Apr-26
PRIMEBANK		5.0%	25.0%	Record Date	28-Apr-26
LINDEBD		0.0%	100.0%	Record Date	29-Apr-26
SHAHJABANK		0.0%	13.0%	Record Date	30-Apr-26
CITYBANK		15.0%	15.0%	Record Date	03-May-26
NITOLINS		0.0%	10.0%	Record Date	10-May-26
PRAGATIINS		3.0%	27.0%	Record Date	12-May-26

**Disclaimer:** This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.