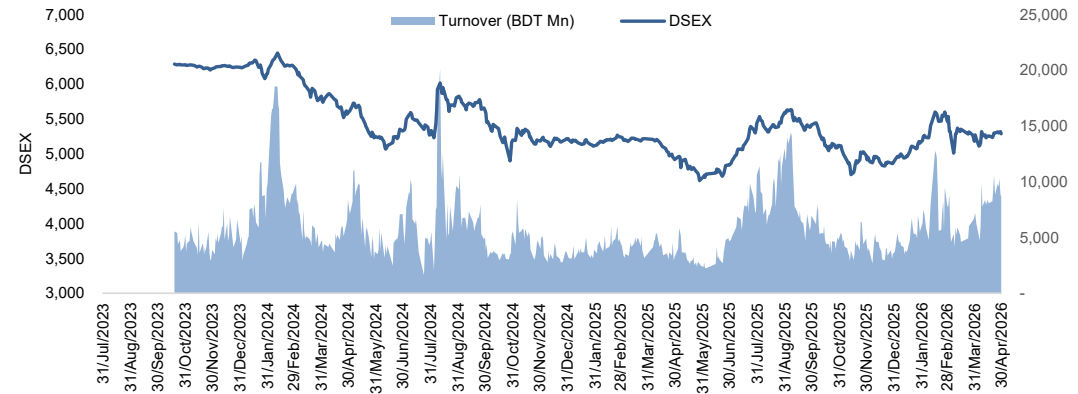


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.57%) lost 30.49 points and closed at 5,286.87. The blue-chip index DS30 (-0.16%), the Shariah-based index DSES (-0.25%), and the large-cap index CDSET (-0.48%) closed at 2,017.01, 1,052.79, and 1,072.72 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.30% followed by Bank (-1.26%), Pharmaceutical (-0.63%), NBFi (-0.51%), Telecommunication (-0.50%), Fuel & Power (-0.45%), and Engineering (+0.74%), respectively. Block trades contributed 2.4% of the overall market turnover. City Bank PLC. (+0.9%) was the most traded share with a turnover of BDT 458 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,286.87	5,317.36	-30.49	-0.57%	+8.7%
DS30	2,017.01	2,020.28	-3.28	-0.16%	+8.8%
DSES	1,052.79	1,055.46	-2.66	-0.25%	+5.2%
CDSET	1,072.72	1,077.85	-5.13	-0.48%	+6.8%

	Advanced	Declined	Unchanged	Total
All Category	113	220	56	389
A Category (Equity)	52	120	28	200
B Category (Equity)	28	47	3	78
N Category (Equity)	0	0	1	1
Z Category (Equity)	33	53	24	110
Mutual Funds	4	6	24	34
Corporate Bonds	0	1	1	2
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,851,187	6,867,698	-0.2%
	Mn USD	55,722	55,856	
Turnover	Mn BDT	8,640	8,878	
	Mn USD	70	72	-2.7%
Volume	Mn Shares	301	308	-2.2%
No. of Trade		218,689	221,703	-1.4%

* Average Interbank Exchange Rate is BDT 122.95 as of Apr 29, 2026

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Figure: Sectorial Turnover (BDT Mn)

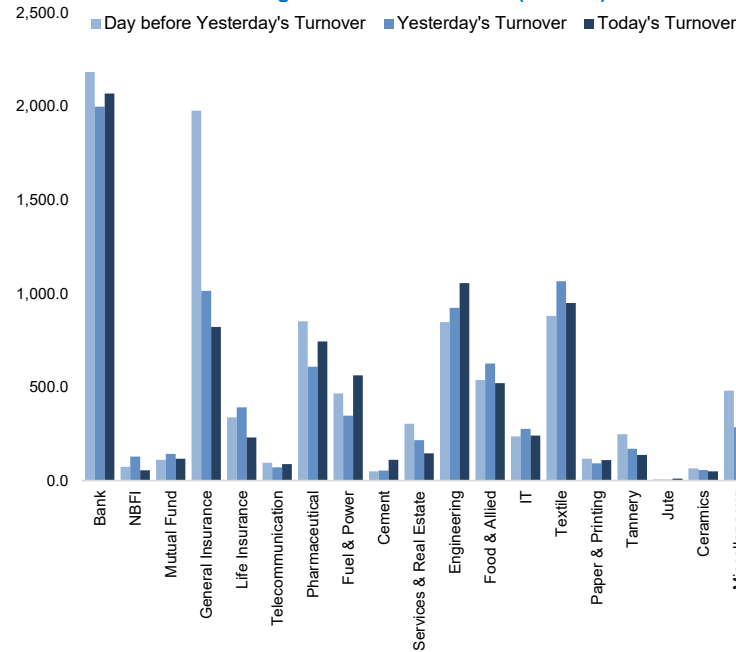
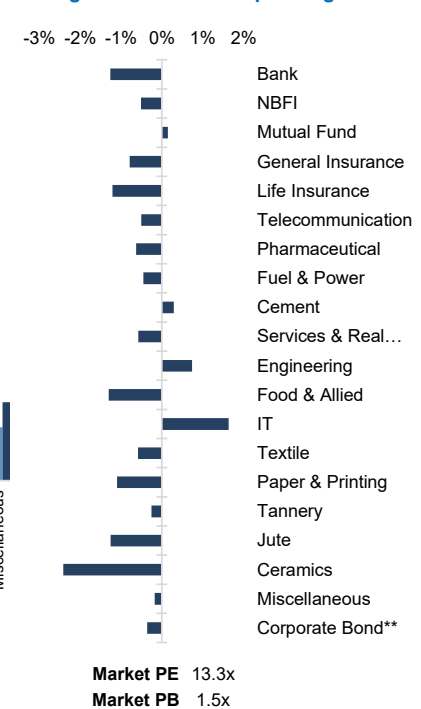


Figure: Sectorial Mcap Change



* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFIs 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	1,552	1,572	-19.84	-1.26%	36	726,400	10.6%	2,066.8	24.5%	7.2x	0.7x	GP	328,123	9.6%	27.4	11.0x	5.2x
NBFI	938	942	-4.80	-0.51%	23	88,672	1.3%	55.5	0.7%	NM	0.9x	SQURPHARMA	187,750	5.5%	60.5	7.3x	1.2x
Mutual Fund	528	527	+0.79	+0.15%	36	25,437	0.4%	117.2	1.4%	NM	0.5x	ROBI	150,852	4.4%	55.1	16.1x	2.2x
General Insurance	3,569	3,598	-28.36	-0.79%	43	100,769	1.5%	821.2	9.7%	16.3x	1.5x	BRACBANK	145,736	4.3%	49.2	8.0x	1.4x
Life Insurance	1,824	1,847	-22.36	-1.21%	15	51,427	0.8%	230.5	2.7%	NM	NM	WALTONHIL	120,726	3.5%	10.3	12.0x	1.0x
Telecommunication	4,358	4,380	-22.00	-0.50%	3	505,647	7.4%	88.2	1.0%	12.1x	3.3x	BATBC	118,908	3.5%	31.7	20.4x	2.1x
Pharmaceutical	2,965	2,983	-18.81	-0.63%	34	559,603	8.2%	743.4	8.8%	10.5x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,051	1,056	-4.78	-0.45%	23	277,380	4.0%	562.0	6.7%	8.9x	0.6x	MARICO	87,214	2.5%	12.9	7.6x	30.1x
Cement	1,869	1,863	+5.40	+0.29%	7	87,910	1.3%	111.6	1.3%	18.5x	1.9x	UPGDCL	68,056	2.0%	2.6	7.3x	1.4x
Services & Real Estate	1,006	1,012	-5.85	-0.58%	9	54,738	0.8%	145.4	1.7%	21.1x	0.4x	BERGERPBL	67,923	2.0%	2.5	20.4x	3.6x
Engineering	2,445	2,427	+17.99	+0.74%	42	274,044	4.0%	1,054.3	12.5%	15.6x	0.8x	ISLAMIBANK	53,613	1.6%	26.9	39.2x	0.7x
Food & Allied	12,285	12,447	-162.24	-1.30%	21	224,263	3.3%	519.8	6.2%	32.1x	3.4x	BXPBARMA	51,214	1.5%	24.8	8.0x	1.0x
IT	2,053	2,020	+32.99	+1.63%	11	27,193	0.4%	240.9	2.9%	31.6x	1.6x	CITYBANK	50,200	1.5%	458.1	3.4x	0.8x
Textile	1,150	1,157	-6.76	-0.58%	58	119,592	1.7%	948.4	11.2%	NM	0.8x	PUBALIBANK	49,845	1.5%	33.4	4.6x	0.7x
Paper & Printing	4,461	4,510	-49.54	-1.10%	6	20,893	0.3%	109.7	1.3%	NM	1.2x	RENATA	47,748	1.4%	33.0	17.5x	1.3x
Tannery	1,996	2,001	-5.14	-0.26%	6	23,182	0.3%	137.3	1.6%	NM	1.5x	EBL	43,725	1.3%	147.3	5.2x	0.9x
Jute	10,354	10,485	-131.32	-1.25%	3	2,258	0.0%	11.0	0.1%	NM	NM	DUTCHBANGL	41,858	1.2%	34.5	3.7x	0.7x
Ceramics	396	406	-9.80	-2.42%	5	17,883	0.3%	48.9	0.6%	NM	1.2x	UNILEVERCL	39,861	1.2%	1.1	51.3x	16.9x
Miscellaneous	3,924	3,931	-6.99	-0.18%	15	213,080	3.1%	418.7	5.0%	89.4x	1.7x	PRIMEBANK	35,949	1.1%	17.5	4.0x	0.7x
Corporate Bond**	17,756	17,821	-64.12	-0.36%	16	39,181	0.6%	0.3	0.0%	NM	NM	ICB	30,701	0.9%	1.5	NM	1.2x
Treasury Bond**	2,223	2,221	+2.59	+0.12%	232	3,414,868	49.8%	1.9	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
PREMIERCCEM	39.8	+9.9%	73.1	15.3x	0.6x	SQURPHARMA	104,859	7.2%	7.3x	1.2x	CITYBANK	33.0	+0.9%	458.1	3.4x	0.8x
AIL	33.2	+9.9%	14.8	12.3x	1.4x	BRACBANK	78,450	5.4%	8.0x	1.4x	NCCBANK	16.9	+1.2%	385.8	3.9x	0.6x
ALIF	5.6	+9.8%	24.2	20.0x	0.4x	BEXIMCO	69,465	4.8%	NM	1.3x	JAMUNABANK	25.4	+1.6%	372.8	5.7x	0.9x
MIRAKHTER	38.3	+9.4%	219.3	28.4x	0.7x	ISLAMIBANK	53,516	3.7%	39.2x	0.7x	DOMINAGE	66.8	+4.4%	243.6	NM	3.9x
BARKAPOWER	8.0	+8.1%	20.8	5.1x	0.3x	WALTONHIL	39,731	2.7%	12.0x	1.0x	KBPWBIL	50.5	+1.4%	221.6	73.2x	4.2x
ATLASBANG	72.7	+6.75%	1.8	NM	0.6x	PUBALIBANK	35,789	2.5%	4.6x	0.7x	MIRAKHTER	38.3	+9.4%	219.3	28.4x	0.7x
BPPL	16.4	+6.5%	199.4	4.7x	1x	BXPBARMA	35,783	2.4%	8.0x	1.0x	UTTARABANK	25.5	-0.8%	215.1	20.3x	0.8x
ZAHEENSPIN	5.8	+5.5%	1.4	8.5x	1.8x	CITYBANK	34,954	2.4%	3.4x	0.8x	BPPL	16.4	+6.5%	199.4	4.7x	0.5x
ICBEPMF1S1	6.2	+5.1%	13.9	NM	0.5x	GP	32,812	2.2%	11.0x	5.2x	ASIATICLAB	106.8	-2.1%	176.9	24.6x	1.9x
SAIFPOWER	6.4	+4.9%	1.9	18.3x	0.4x	BATBC	31,451	2.2%	20.4x	2.1x	BDTHAIFOOD	20.6	+0.5%	158.2	NM	1.7x

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)
DESCO	22.6	-7.0%	5.2	NM	0.6x	DOMINAGE	62.5	58.3	9.0	561	34.44
APEXSPINN	343.7	-6.9%	69.7	NM	4x	NORTHNRINS	35.5	35.5	6.0	649	23.04
APEXTANRY	94.5	-6.3%	2.5	4.7x	0.4x	CITYGENINS	107.0	92.0	4.0	129	12.87
SBACBANK	6.0	-6.3%	2.5	4.7x	0.4x	CENTRALINS	43.0	43.0	6.0	276	11.87
STANDBANKL	4.6	-6.1%	7.7	12.1x	0.3x	NCCBANK	18.3	18.3	5.0	601	10.99
SOUTHEASTB	9.9	-5.7%	60.4	4.9x	0.4x	ASIATICLAB	105.0	105.0	1.0	100	10.50
CRYSTALINS	78.3	-5.2%	77.2	22.2x	2.8x	CITYBANK	30.0	30.0	1.0	314	9.41
NORTHNRINS	30.7	-5.0%	2.4	18.1x	1.2x	SLIPLC	74.0	73.8	2.0	123	9.09
FAREASTFIN	2.0	-4.8%	1.5	NM	NM	RELIANCINS	90.0	90.0	1.0	100	9.00
BIFC	4.0	-4.8%	1.3	NM	NM	PEOPLESINS	58.0	57.0	3.0	123	7.03

* 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
DOMINAGE	62.5	58.3	34.4	561	9
NORTHRNINS	35.5	35.5	23.0	649	6
CITYGENINS	107.0	92.0	12.9	129	4
CENTRALINS	43.0	43.0	11.9	276	6
NCCBANK	18.3	18.3	11.0	601	5
ASIATICLAB	105.0	105.0	10.5	100	1
CITYBANK	30.0	30.0	9.4	314	1
SLIPLC	74.0	73.8	9.1	123	2
RELIANCINS	90.0	90.0	9.0	100	1
PEOPLESINS	58.0	57.0	7.0	123	3
BNICL	84.9	84.9	6.8	80	1
GQBALLPEN	600.0	595.0	5.7	10	7
SAPORTL	47.0	47.0	4.7	100	2
GLOBALINS	34.8	34.0	4.7	136	3
PTL	63.6	63.5	4.4	70	2
DUTCHBANGL	44.3	44.3	4.1	93	1
ICBEPMF1S1	5.7	5.6	3.4	600	3
ISLAMIINS	43.1	43.1	3.1	73	1
APEXSPINN	375.0	375.0	2.6	7	3
AMANFEED	26.5	26.5	2.5	95	1
SAIHAMCOT	22.1	21.0	2.4	112	3
BENGALWTL	24.4	23.5	2.4	100	2
Total			207.2		92

Important DSE News

SQRPHARMA

(Q3 Un-audited): Consolidated EPS was Tk. 6.73 for January-March 2026 as against Tk. 6.83 for January-March 2025; Consolidated EPS was Tk. 23.29 for July 2025-March 2026 as against Tk. 21.15 for July 2024-March 2025. Consolidated NOCFPS was Tk. 17.54 for July 2025-March 2026 as against Tk. 11.90 for July 2024-March 2025. Consolidated NAV per share was Tk. 169.79 as on March 31, 2026 and Tk. 157.88 as on June 30, 2025.

RENATA

(Q3 Un-audited): Consolidated EPS was Tk. 6.81 for January-March 2026 as against Tk. 5.12 for January-March 2025; Consolidated EPS was Tk. 20.39 for July 2025-March 2026 as against Tk. 15.95 for July 2024-March 2025. Consolidated NOCFPS was Tk. 22.40 for July 2025-March 2026 as against Tk. 21.76 for July 2024-March 2025. Consolidated NAV per share was Tk. 320.02 as on March 31, 2026, and Tk. 305.49 as on June 30, 2025.

MARICO

The Board of Directors has recommended Final Cash Dividend of 500% i.e. BDT 50.00 per share of BDT 10.00 each (Total 2075% Cash Dividend for the Financial Year 2025-2026 inclusive of 1575% Interim Cash Dividend, which has already been paid). Date of AGM: 14.07.2026. Time: 10:00 AM. The Company has also reported EPS of Tk. 206.09, NAV per share of Tk. 92.02 and NOCFPS of Tk. 177.32 for the year ended March 31, 2026 as against Tk. 187.49, Tk. 239.13 and Tk. 146.23 respectively for the year ended March 31, 2025.

CITYBANK

(Q1 Un-audited): Consolidated EPS was Tk. 1.58 for January-March 2026 as against Tk. 0.61 for January-March 2025. Consolidated NOCFPS was Tk. 7.69 for January-March 2026 as against Tk. 9.42 for January-March 2025. Consolidated NAV per share was Tk. 43.31 as on March 31, 2026, and Tk. 40.67 as on December 31, 2025. In computing figures for same period of previous year bonus shares declared and issued based on 2024 performance were duly considered.

PUBALIBANK

The Board of Directors has recommended 15% Cash and 15% Stock Dividend for the year ended December 31, 2025. Date of AGM: 16.06.2026, Time: 11:00 AM, Venue/Mode: Digital Platform, Record Date: 20.05.2026. The Company has also reported Consolidated EPS of Tk. 8.38, Consolidated NAV per share of Tk. 54.32 and Consolidated NOCFPS of Tk. 32.04 for the year ended December 31, 2025 (cont.1)

ISLAMIBANK

The Board of Directors has recommended No Dividend for the year ended December 31, 2025. Date of AGM: 25.06.2026, Time: 10:00 AM, Venue/Mode: Venue will be announced later, Record Date: 21.05.2026. The Company has also reported Consolidated EPS of Tk. 0.85, Consolidated NAV per share of Tk. 44.52 and Consolidated NOCFPS of Tk. 26.18 for the year ended December 31, 2025 as against Tk. 0.68, Tk. 44.36 and Tk. 57.90 respectively for the year ended December 31, 2024.

MJLBD

(Q3 Un-audited): Consolidated EPS was Tk. 2.05 for January-March 2026 as against Tk. 1.43 for January-March 2025; Consolidated EPS was Tk. 5.91 for July 2025-March 2026 as against Tk. 8.09 for July 2024-March 2025. Consolidated NOCFPS was Tk. 15.83 for July 2025-March 2026 as against Tk. 0.29 for July 2024-March 2025. Consolidated NAV per share was Tk. 54.78 as on March 31, 2026 and Tk. 54.06 as on June 30, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CITYBANK		15.0%	15.0%	Record Date	3-May-26
EBL		3.0%	25.0%	Record Date	6-May-26
NITOLINS		0.0%	10.0%	Record Date	10-May-26
PRAGATIINS		3.0%	27.0%	Record Date	12-May-26
BNICL		0.0%	22.0%	Record Date	13-May-26
BRACBANK		15.0%	15.0%	Record Date	17-May-26
CENTRALINS		0.0%	12.0%	Record Date	20-May-26
EASTLAND		0.0%	10.0%	Record Date	2-Jun-26
ASIAINS		0.0%	10.0%	Record Date	3-Jun-26
RUPALIINS		5.0%	5.0%	Record Date	4-Jun-26

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