

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.45%) gained 21.12 points and closed at 4,689.52. The blue-chip index DS30 (+0.47%), the Shariah-based index DSES (+0.58%), and the large-cap index CDSET (+0.34%) closed at 1,755.80, 1,023.73, and 965.07 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.35% followed by Bank (+0.95%), Engineering (+0.74%), Telecommunication (+0.36%), Fuel & Power (+0.25%), Pharmaceutical (+0.09%), and Food & Allied (-0.30%), respectively. Block trades contributed 9.2% of the overall market turnover. BRAC Bank Ltd. (+1.9%) was the most traded share with a turnover of BDT 311 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,689.52	4,668.41	+21.12	+0.45%	-10.1%
DS30	1,755.80	1,747.58	+8.21	+0.47%	-9.5%
DSES	1,023.73	1,017.78	+5.95	+0.58%	-12.4%
CDSET	965.07	961.80	+3.27	+0.34%	-9.5%

	Advanced	Declined	Unchanged	Total
All Category	209	101	86	396
A Category (Equity)	127	49	40	216
B Category (Equity)	35	30	18	83
N Category (Equity)	0	0	1	1
Z Category (Equity)	47	22	27	96
Mutual Funds	11	9	16	36
Corporate Bonds	1	0	3	4
Treasury Bonds	0	1	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,526,931	6,502,062	+0.4%
	Mn USD	53,069	52,867	
Turnover	Mn BDT	2,753	2,352	+17.1%
	Mn USD	22	19	
Volume	Mn Shares	107	109	-2.3%
No. of Trade		95,228	86,900	+9.6%

\* Average Interbank Exchange Rate is BDT 122.99 as of Jun 02, 2025

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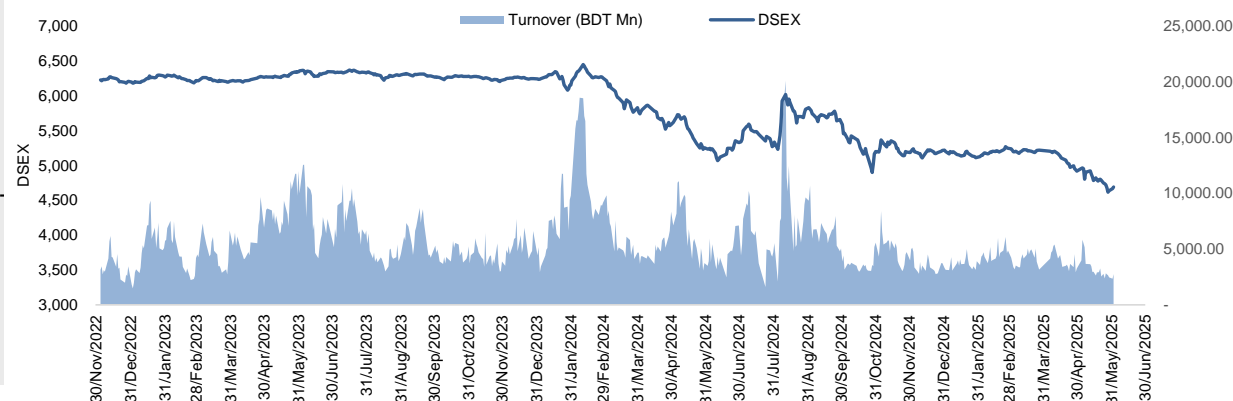


Figure: Sectorial Turnover (BDT Mn)

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

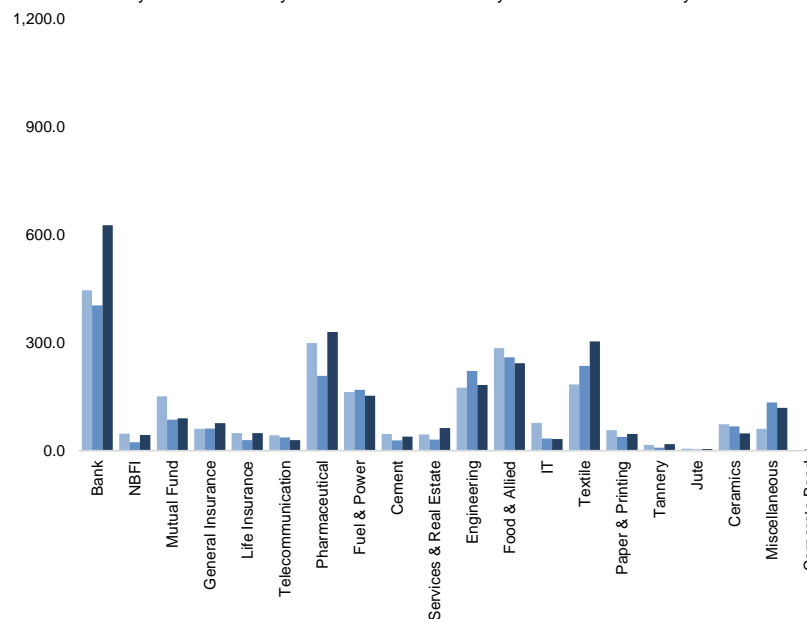
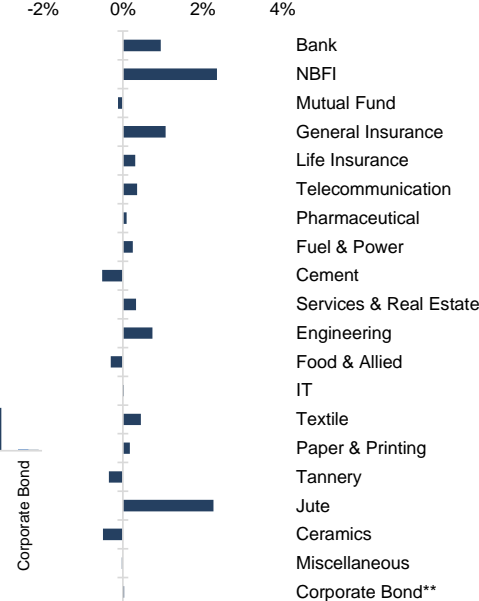


Figure: Sectorial Mcap Change

-2% 0% 2% 4%



Market PE 20.9x

Market PB 1.1x

\* 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	1,288	1,275	+12.14	+0.95%	36	609,210	9.4%	625.8	25.0%	17.7x	0.6x	GP	387,806	12.1%	11.4	13.3x	5.5x
NBFI	940	919	+21.63	+2.35%	23	89,588	1.4%	43.8	1.8%	NM	NM	SQURPHARMA	178,531	5.6%	142.3	7.6x	1.3x
Mutual Fund	615	616	-0.75	-0.12%	37	28,256	0.4%	90.3	3.6%	NM	0.5x	BATBC	146,016	4.6%	28.8	8.8x	2.8x
General Insurance	2,327	2,302	+24.63	+1.07%	43	66,354	1.0%	76.6	3.1%	11.1x	1.0x	ROBI	124,663	3.9%	18.0	17.2x	1.8x
Life Insurance	1,523	1,518	+4.71	+0.31%	15	40,509	0.6%	48.9	2.0%	NM	NM	WALTONHIL	122,504	3.8%	7.1	9.5x	1.1x
Telecommunication	4,557	4,540	+16.31	+0.36%	3	534,296	8.2%	29.8	1.2%	14.1x	3.4x	BEXIMCO	103,850	3.2%	0.1	NM	1.3x
Pharmaceutical	2,699	2,696	+2.52	+0.09%	34	511,604	7.9%	329.7	13.2%	11.8x	1.4x	BRACBANK	95,365	3.0%	310.7	7.0x	1.1x
Fuel & Power	1,035	1,033	+2.59	+0.25%	23	274,241	4.2%	152.8	6.1%	17.3x	0.6x	BERGERPBL	80,684	2.5%	6.2	23.5x	5.6x
Cement	1,650	1,658	-8.65	-0.52%	7	78,621	1.2%	39.0	1.6%	18.8x	1.7x	MARICO	73,379	2.3%	5.6	12.4x	9.7x
Services & Real Estate	881	878	+2.87	+0.33%	9	48,439	0.7%	63.1	2.5%	22.3x	0.4x	UPGDCL	68,114	2.1%	3.4	5.8x	1.6x
Engineering	2,196	2,180	+16.15	+0.74%	42	247,743	3.8%	182.7	7.3%	11.4x	0.8x	ISLAMIBANK	53,935	1.7%	6.2	11.6x	0.7x
Food & Allied	13,585	13,626	-41.25	-0.30%	21	248,572	3.8%	242.7	9.7%	14.4x	3.9x	LHB	49,591	1.6%	23.9	13.8x	2.5x
IT	1,630	1,630	+0.41	+0.03%	11	21,505	0.3%	32.5	1.3%	18.1x	1.4x	UNILEVERCL	42,531	1.3%	0.3	73.1x	16.5x
Textile	984	980	+4.41	+0.45%	58	102,471	1.6%	303.6	12.1%	NM	0.7x	ICB	41,021	1.3%	20.4	NM	1.0x
Paper & Printing	3,854	3,847	+6.81	+0.18%	6	17,413	0.3%	46.5	1.9%	NM	0.8x	BXPBARMA	38,767	1.2%	30.3	6.1x	0.8x
Tannery	1,834	1,840	-6.42	-0.35%	6	20,430	0.3%	18.2	0.7%	62.8x	1.5x	DUTCHBANGL	36,928	1.2%	1.4	8.5x	0.7x
Jute	9,516	9,305	+211.28	+2.27%	3	2,095	0.0%	5.1	0.2%	NM	NM	EBL	35,746	1.1%	33.0	5.3x	0.7x
Ceramics	356	358	-1.77	-0.50%	5	15,967	0.2%	47.8	1.9%	NM	1.0x	PUBALIBANK	32,015	1.0%	2.3	4.1x	0.6x
Miscellaneous	4,108	4,109	-1.18	-0.03%	15	223,082	3.4%	119.3	4.8%	87.8x	1.8x	OLYMPIC	29,391	0.9%	3.8	15.9x	2.4x
Corporate Bond**	15,246	15,242	+4.57	+0.03%	16	33,392	0.5%	2.4	0.1%	NM	NM	CITYBANK	28,903	0.9%	53.3	2.9x	0.6x
Treasury Bond**	2,027	2,029	-1.63	-0.08%	235	3,297,159	50.6%	0.1	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
NORTHERN	91.2	+9.4%	0.3	NM	1.1x	SQURPHARMA	108,958	7.7%	7.6x	1.3x	BRACBANK	47.9	+1.9%	310.7	7.0x	1.1x
PHARMAID	505.7	+7.4%	14.1	29.7x	3.8x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	SQURPHARMA	201.4	-1.0%	142.3	7.6x	1.3x
DHAKAINS	35.6	+7.2%	6.5	12.4x	1.0x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	42.0	-	59.2	9.0x	2.5x
AFTABAUTO	28.5	+7.1%	15.4	NM	0.6x	BATBC	50,233	3.6%	8.8x	2.8x	FINEFOODS	222.5	+2.3%	58.7	50.2x	15.3x
DSHGARME	77.7	+6.7%	20.0	NM	4.2x	WALTONHIL	46,773	3.3%	9.5x	1.1x	MALEKSPIN	23.3	+4.0%	58.1	3.2x	0.4x
ASIAPACINS	29.2	+6.57%	2.2	17.1x	1.2x	BRACBANK	46,489	3.3%	7.0x	1.1x	BSC	88.5	+1.5%	55.1	4.5x	0.9x
STANDARINS	36.0	+6.5%	8.6	15.5x	2x	GP	44,708	3.2%	13.3x	5.5x	CITYBANK	19.0	+3.8%	53.3	2.9x	0.6x
MLDYEING	8.7	+6.1%	12.5	37.8x	0.6x	RENATA	32,968	2.3%	19.6x	1.6x	UTTARABANK	20.9	+1.0%	52.2	NM	0.6x
SOUTHEASTB	7.2	+5.9%	1.8	NM	0.3x	BXPBARMA	23,409	1.7%	6.1x	0.8x	LOVELLO	83.3	+0.1%	49.1	37.5x	6.6x
NBL	3.7	+5.7%	0.6	NM	8.2x	PUBALIBANK	22,905	1.6%	4.1x	0.6x	ORIONINFU	327.9	+4.2%	48.6	NM	20.9x
						CITYBANK	21,020	1.5%	2.9x	0.6x						
						LHB	20,953	1.5%	13.8x	2.5x						
						OLYMPIC	20,496	1.5%	15.9x	2.4x						
						ALARABANK	18,282	1.3%	35.3x	0.8x						
						BEACONPHAR	17,838	1.3%	28.4x	3.8x						
						PRIMEBANK	16,142	1.1%	3.1x	0.6x						
						ROBI	14,876	1.1%	17.2x	1.8x						
						UTTARABANK	13,699	1.0%	NM	0.6x						
						NBL	13,055	0.9%	NM	8.2x						
						BSRMLTD	12,852	0.9%	4.2x	0.4x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
FIRSTFIN	3.2	-8.6%	0.4	NM	NM											
SAFKOSPINN	9.2	-7.1%	0.5	NM	NM											
RENWICKJA	641.2	-5.1%	0.1	NM	NM											
PLFSL	1.9	-5.0%	0.3	NM	NM											
SONARGAON	34.5	-5.0%	26.8	NM	1.8x											
SEMLLECMF	10.4	-4.6%	15.3	NM	1.2x											
ANLIMAYARN	21.2	-4.1%	0.0	NM	3.4x											
SONALILIFE	47.2	-4.1%	0.8	NM	NM											
SIBL	7.2	-4.0%	2.5	NM	0.4x											
TUNGHAI	2.5	-3.8%	0.7	NM	NM											
						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
						FINEFOODS	236.4	210.0	20.0	567	122.03					
						MIDLANDBNK	27.9	25.5	7.0	1,180	30.33					
						LOVELLO	83.7	79.0	10.0	329	26.42					
						GP	312.1	312.1	1.0	25	7.80					
						ITC	37.9	35.0	2.0	211	7.55					
						SQURPHARMA	202.9	202.9	1.0	36	7.37					
						INTRACO	23.1	21.4	2.0	290	6.56					
						SEMLLECMF	10.2	10.2	2.0	500	5.10					
						HAMI	109.0	109.0	1.0	45	4.91					
						KDSALTD	40.8	40.3	3.0	115	4.68					

\* 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
FINEFOODS	236.4	210.0	122.0	567	20
MIDLANDBNK	27.9	25.5	30.3	1,180	7
LOVELLO	83.7	79.0	26.4	329	10
GP	312.1	312.1	7.8	25	1
ITC	37.9	35.0	7.5	211	2
SQURPHARMA	202.9	202.9	7.4	36	1
INTRACO	23.1	21.4	6.6	290	2
SEMLLECMF	10.2	10.2	5.1	500	2
HAMI	109.0	109.0	4.9	45	1
KDSALTD	40.8	40.3	4.7	115	3
CITYGENINS	40.4	40.4	3.2	80	1
COPPERTECH	19.0	19.0	3.2	169	1
ENVOYTEX	44.1	44.1	2.7	62	1
NLTUBES	72.0	72.0	2.2	30	1
SPCERAMICS	24.2	24.2	2.1	89	1
PRIMEINSUR	24.3	24.3	2.0	82	1
PURABIGEN	16.0	16.0	1.9	120	1
SIMTEX	16.2	15.8	1.7	107	2
SHEPHERD	16.6	16.6	1.7	100	1
CLICL	48.1	47.0	1.5	32	3
APEXFOODS	170.0	170.0	1.4	8	1
MAGURAPLEX	83.0	83.0	0.8	10	1
<b>Total</b>			<b>252.2</b>		<b>73</b>

**Important DSE News**
**DELTALIFE**

The Board of Directors has recommended 30% Cash Dividend (Tk. 3.00 per share of Tk. 10/- each) for the year ended December 31, 2024. Date of AGM: 26.07.2025, Time: 11:00 AM, Venue/Mode: Virtually by using Digital Platform. Record Date: 30.06.2025.

**SAFKOSPINN**

The company has informed that despite their sincere efforts, the situation of the company has not improved up to expected level due to present economic turmoilic conditions in the field of Textile market and due to scarcity and very high price of raw materials in local market. In that circumstances, the management of the company has decided to extend the shutdown period of production for further 2.5 months upto 16 August 2025 which includes the Eid ul Azha holiday from 4th June to 14th June 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EASTLAND		0.0%	10.0%	Record Date	2-Jun-25
PEOPLESINS		0.0%	10.5%	Record Date	2-Jun-25
MIDASFIN		0.0%	0.0%	Record Date	2-Jun-25
PHENIXINS		0.0%	10.0%	Record Date	3-Jun-25
CONTININS		0.0%	5.0%	Record Date	15-Jun-25
ASIAPACINS		0.0%	10.0%	Record Date	15-Jun-25
PRIMEINSUR		0.0%	10.0%	Record Date	15-Jun-25
NORTHRNINS		0.0%	10.0%	Record Date	15-Jun-25
NBL		0.0%	0.0%	Record Date	15-Jun-25
FEDERALINS		0.0%	10.0%	Record Date	16-Jun-25
ISLAMIINS		0.0%	20.0%	Record Date	18-Jun-25
ICICL		0.0%	10.0%	Record Date	18-Jun-25
ILFSL		0.0%	0.0%	Record Date	19-Jun-25
NITOLINS		5.0%	5.0%	Record Date	24-Jun-25
ONEBANKPLC		0.0%	0.0%	Record Date	24-Jun-25

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