

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.53%) lost 24.73 points and closed at 4,664.79. The blue-chip index DS30 (-0.55%), the Shariah-based index DSES (-0.63%), and the large-cap index CDSET (-0.36%) closed at 1,746.22, 1,017.32, and 961.63 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.20% followed by Engineering (-1.17%), Food & Allied (-0.81%), Telecommunication (-0.75%), Bank (-0.52%), Pharmaceutical (-0.30%), and Fuel & Power (-0.25%), respectively. Block trades contributed 2.5% of the overall market turnover. BRAC Bank Ltd. (+0.8%) was the most traded share with a turnover of BDT 181 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,664.79	4,689.52	-24.73	-0.53%	-10.6%
DS30	1,746.22	1,755.80	-9.58	-0.55%	-10.0%
DSES	1,017.32	1,023.73	-6.41	-0.63%	-13.0%
CDSET	961.63	965.07	-3.44	-0.36%	-9.8%

	Advanced	Declined	Unchanged	Total
All Category	93	239	62	394
A Category (Equity)	60	128	27	215
B Category (Equity)	12	65	7	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	21	46	28	95
Mutual Funds	7	18	11	36
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,471,528	6,526,931	-0.8%
	Mn USD	52,620	53,070	
Turnover	Mn BDT	2,291	2,753	-16.8%
	Mn USD	19	22	
Volume	Mn Shares	98	107	-8.8%
No. of Trade		87,384	95,228	-8.2%

\* Average Interbank Exchange Rate is BDT 122.99 as of Jun 03, 2025

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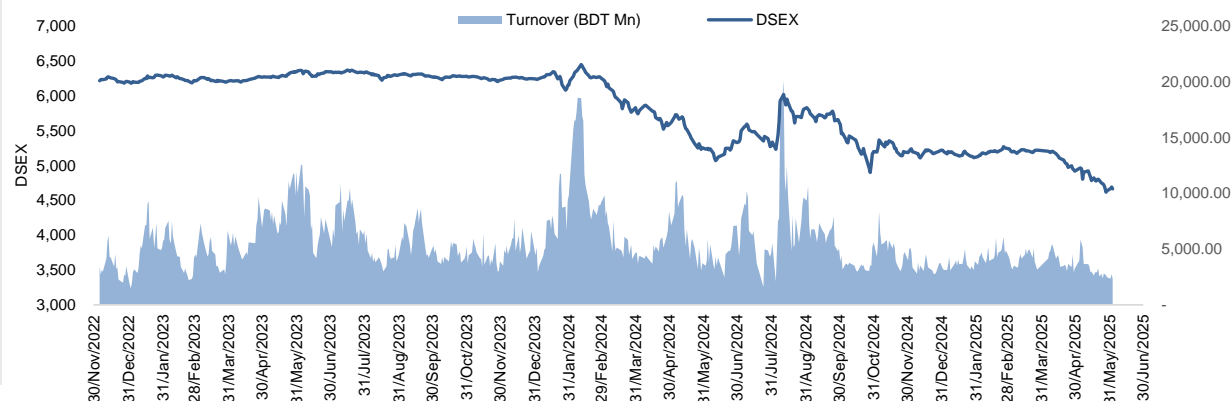


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

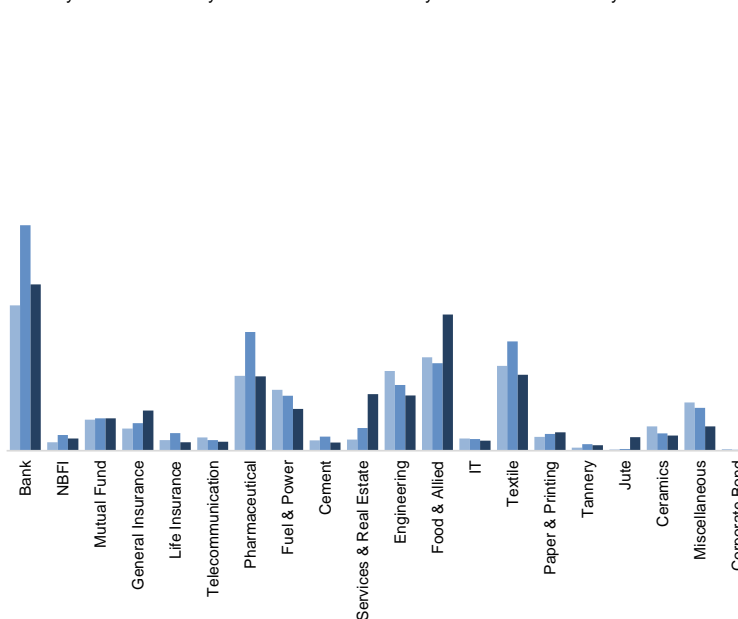
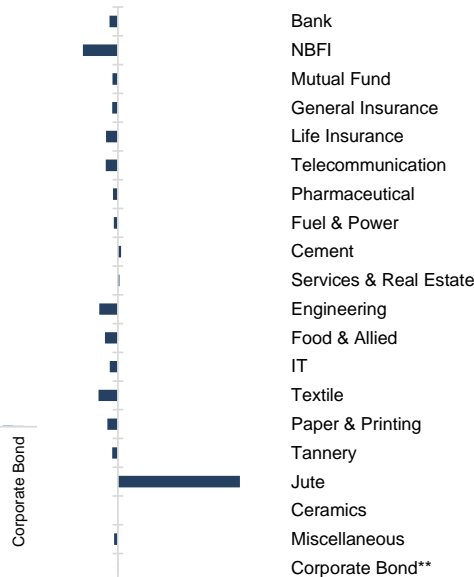


Figure: Sectorial Mcap Change

-5% 0% 5% 10%



Market PE 20.8x

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	1,281	1,288	-6.72	-0.52%	36	606,033	9.4%	461.6	20.7%	17.6x	0.6x	GP	384,025	12.1%	10.9	13.1x	5.4x
NBFI	920	940	-20.64	-2.20%	23	87,621	1.4%	34.0	1.5%	NM	NM	SQURPHARMA	178,974	5.6%	40.6	7.6x	1.3x
Mutual Fund	613	615	-2.08	-0.34%	37	28,161	0.4%	90.1	4.0%	NM	0.5x	BATBC	142,992	4.5%	23.9	8.6x	2.7x
General Insurance	2,318	2,327	-8.22	-0.35%	43	66,119	1.0%	111.8	5.0%	11.1x	1.0x	ROBI	124,663	3.9%	14.0	17.2x	1.8x
Life Insurance	1,512	1,523	-11.40	-0.75%	15	40,206	0.6%	23.5	1.1%	NM	NM	WALTONHIL	120,444	3.8%	3.5	9.3x	1.1x
Telecommunication	4,522	4,557	-34.32	-0.75%	3	530,272	8.2%	25.1	1.1%	14.0x	3.4x	BEXIMCO	103,850	3.3%	0.0	NM	1.3x
Pharmaceutical	2,691	2,699	-8.12	-0.30%	34	510,064	7.9%	206.4	9.2%	11.8x	1.4x	BRACBANK	96,162	3.0%	181.2	7.1x	1.2x
Fuel & Power	1,033	1,035	-2.57	-0.25%	23	273,560	4.2%	116.2	5.2%	17.2x	0.6x	BERGERPBL	80,294	2.5%	5.9	23.4x	5.5x
Cement	1,653	1,650	+3.33	+0.20%	7	78,780	1.2%	22.5	1.0%	18.9x	1.7x	MARICO	74,006	2.3%	6.2	12.5x	9.8x
Services & Real Estate	882	881	+0.92	+0.10%	9	48,489	0.8%	156.8	7.0%	22.3x	0.4x	UPGDCL	68,114	2.1%	1.8	5.8x	1.6x
Engineering	2,170	2,196	-25.70	-1.17%	42	244,843	3.8%	153.2	6.9%	11.2x	0.7x	ISLAMIBANK	53,774	1.7%	3.3	11.5x	0.7x
Food & Allied	13,475	13,585	-109.81	-0.81%	21	246,563	3.8%	377.8	16.9%	14.3x	3.9x	LHB	49,823	1.6%	14.2	13.9x	2.5x
IT	1,622	1,630	-8.24	-0.51%	11	21,396	0.3%	28.3	1.3%	18.0x	1.3x	UNILEVERCL	43,201	1.4%	0.4	74.3x	16.7x
Textile	972	984	-12.00	-1.22%	58	101,221	1.6%	210.8	9.4%	NM	0.7x	ICB	39,547	1.2%	9.8	NM	0.9x
Paper & Printing	3,829	3,854	-25.05	-0.65%	6	17,300	0.3%	51.1	2.3%	NM	0.8x	BXPBARMA	38,276	1.2%	15.5	6.0x	0.8x
Tannery	1,827	1,834	-6.61	-0.36%	6	20,357	0.3%	15.5	0.7%	62.6x	1.5x	DUTCHBANGL	37,508	1.2%	1.7	8.6x	0.7x
Jute	10,244	9,516	+728.04	+7.65%	3	2,255	0.0%	37.8	1.7%	NM	NM	EBL	35,587	1.1%	22.4	5.2x	0.7x
Ceramics	356	356	-0.08	-0.02%	5	15,964	0.2%	42.5	1.9%	NM	1.0x	PUBALIBANK	32,145	1.0%	1.3	4.1x	0.6x
Miscellaneous	4,098	4,108	-9.80	-0.24%	15	222,550	3.4%	67.6	3.0%	87.6x	1.8x	OLYMPIC	29,531	0.9%	3.6	16.0x	2.5x
Corporate Bond**	15,246	15,246	+0.05	+0.00%	16	33,392	0.5%	1.0	0.0%	NM	NM	CITYBANK	28,751	0.9%	35.3	2.8x	0.6x
Treasury Bond**	2,005	2,027	-22.33	-1.10%	235	3,260,554	50.5%	0.0	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
SONALIANSH	156.7	+9.2%	37.5	NM	2.3x	SQURPHARMA	108,958	7.7%	7.6x	1.3x	BRACBANK	48.3	+0.8%	181.2	7.1x	1.2x
SEAPEARL	48.5	+7.8%	135.9	NM	2.9x	ISLAMIBANK	74,730	5.3%	11.5x	0.7x	SEAPEARL	48.5	+7.8%	135.9	NM	2.9x
NORTHERN	97.5	+6.9%	0.3	NM	1.2x	BEXIMCO	69,463	4.9%	NM	1.3x	LOVELLO	84.8	+1.8%	106.3	38.2x	6.7x
SEMLLECMF	11.1	+6.7%	24.8	NM	1.2x	BATBC	50,233	3.6%	8.6x	2.7x	FINEFOODS	227.0	+2.0%	103.5	51.2x	15.6x
SAMATALETH	54.7	+5.2%	6.8	NM	3.8x	WALTONHIL	46,773	3.3%	9.3x	1.1x	ORIONINFU	324.8	-0.9%	65.1	NM	20.7x
GEMINISEA	112.9	+4.15%	9.6	NM	9.2x	BRACBANK	46,489	3.3%	7.1x	1.2x	MIDLANDBNK	25.1	-9.1%	58.0	19.7x	1.7x
ICBEPMF1S1	5.2	+4.0%	1.0	NM	1x	GP	44,708	3.2%	13.1x	5.4x	BEACHHATCH	41.1	-2.1%	55.1	8.8x	2.5x
UNIONINS	26.7	+3.9%	4.4	14.2x	1.4x	RENATA	32,968	2.3%	19.4x	1.6x	FUWANGFOOE	14.8	+1.4%	50.8	NM	6.4x
ICBIBANK	2.8	+3.7%	0.4	NM	NM	BXPBARMA	23,409	1.7%	6.0x	0.8x	MALEKSPIN	22.9	-1.7%	43.9	3.1x	0.4x
SAFKOSPINN	9.5	+3.3%	0.2	NM	NM	PUBALIBANK	22,905	1.6%	4.1x	0.6x	STANDARINS	36.0	-	42.7	15.5x	1.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	2.8x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MIDLANDBNK	25.1	-9.1%	58.0	19.7x	1.7x	LHB	20,953	1.5%	13.9x	2.5x	SEMLLECMF	10.4	10.3	2.0	1,200	12.37
DHAKAINS	32.9	-7.6%	3.6	15.2x	1x	OLYMPIC	20,496	1.5%	16.0x	2.5x	LOVELLO	91.5	80.3	7.0	136	11.44
SONARGAON	32.2	-6.7%	35.2	97.6x	1.7x	ALARABANK	18,282	1.3%	35.3x	0.8x	FINEFOODS	222.0	217.5	3.0	32	6.98
UTTARAFIN	10.2	-6.4%	0.4	NM	0.2x	BEACONPHAR	17,838	1.3%	27.8x	3.7x	PRIMEINSUR	24.0	24.0	1.0	166	3.99
ALLTEX	9.3	-6.1%	0.8	NM	0.5x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	MTB	12.1	12.1	1.0	200	2.42
KDSALTD	40.7	-4.9%	36.6	18.4x	1.5x	ROBI	14,876	1.1%	17.2x	1.8x	AMANFEED	24.0	24.0	1.0	99	2.38
ZEALBANGLA	80.8	-4.8%	0.2	NM	NM	UTTARABANK	13,699	1.0%	NM	0.6x	RDFOOD	21.5	21.5	1.0	104	2.24
SHASHADNIM	18.3	-4.7%	17.1	10.5x	0.4x	NBL	13,055	0.9%	NM	8.2x	DUTCHBANGL	42.0	42.0	1.0	38	1.58
SHURWID	6.4	-4.5%	0.5	NM	0.5x	BSRMLTD	12,852	0.9%	4.2x	0.5x	RELANCE1	18.4	18.4	2.0	73	1.34
VFSTDL	6.5	-4.4%	0.7	54.2x	0.3x	* 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
SEMLLECMF	10.4	10.3	12.4	1,200	2
LOVELLO	91.5	80.3	11.4	136	7
FINEFOODS	222.0	217.5	7.0	32	3
PRIMEINSUR	24.0	24.0	4.0	166	1
MTB	12.1	12.1	2.4	200	1
AMANFEED	24.0	24.0	2.4	99	1
RDFOOD	21.5	21.5	2.2	104	1
DUTCHBANGL	42.0	42.0	1.6	38	1
RELIANCE1	18.4	18.4	1.3	73	2
APOLOISPAT	3.3	3.3	1.3	400	1
APEXTANRY	69.0	69.0	1.3	19	1
LRBDL	13.1	13.1	1.3	100	1
BBSCABLES	15.3	15.3	1.2	76	1
BPML	35.5	35.5	1.1	30	1
NATLIFEINS	77.5	77.5	0.9	12	1
MONNOCERA	81.0	81.0	0.9	11	1
BSCPLC	126.3	126.3	0.8	6	1
MAGURAPLEX	82.0	82.0	0.8	10	1
STANDARINS	37.6	37.6	0.8	22	1
NLTUBES	79.5	79.5	0.8	10	1
BEACONPHAR	114.5	114.5	0.5	5	1
SONARGAON	34.2	34.2	0.5	15	1
<b>Total</b>			<b>57.0</b>		<b>32</b>

#### Important DSE News

##### DHAKAINS

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 07.08.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 10.07.2025. The Company has also reported EPS of Tk. 2.41, NAV per share with revaluation of Tk. 35.65, NAV per share without revaluation of Tk. 25.02 and NOCFPS of Tk. 0.84 for the year ended December 31, 2024 as against Tk. 2.84, Tk. 34.59, Tk. 23.95 and Tk. 0.18 respectively for the year ended December 31, 2023.

**(Q1 Un-audited):** EPS was Tk. 0.50 for January-March 2025 as against Tk. 0.75 for January-March 2024. NOCFPS was Tk. (0.66) for January-March 2025 as against Tk. 0.83 for January-March 2024. NAV per share (with revaluation) was Tk. 36.56 as on March 31, 2025 and Tk. 35.65 as on December 31, 2024, NAV per share (without revaluation) was Tk. 25.93 as on March 31, 2025 and Tk. 25.02 as on December 31, 2024.

##### SEAPEARL

The Company has been placed in 'B' category from existing 'Z' category with effect from today i.e., June 03, 2025 as the AGM of the Company has held and approved the proposed 7% cash dividend for the year ended June 30, 2024.

##### ATCSLGF

Notice is hereby given to the Margin Account Unitholders of Asian Tiger Sandhani Life Growth Fund (Under Liquidation) and the Margin Loan Providers (i.e. Merchant Bank and Stock Broker) to provide details of Unitholders that are in the category of Margin Account. Full details (shareholders' name, BO ID, shareholding position, Bank name, A/c No, & Routing No., etc.) along with their respective claims should be submitted by June 30, 2025 to the Trustee, Bangladesh General Insurance Company PLC., Trustee Department (1st floor, 42 Dilkusha C/A, Dhaka-1000.)

##### BANKASIA

Refer to their earlier news disseminated by DSE on 15.05.2025 regarding transfer of shares outside the trading system of the Exchange, 1,700,000 shares of Bank Asia PLC. of Mr. Mir Shahjahan and 4,600,000 shares of Bank Asia PLC. of Mrs. Nahid Akhter Sinha have been transferred to Union Capital Limited

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
DHAKABANK		5.0%	5.0%	Record Date	25-Jun-25
SICL		0.0%	5.0%	Record Date	26-Jun-25
PHOENIXFIN		0.0%	0.0%	Record Date	26-Jun-25
SBACBANK		0.0%	0.0%	Record Date	26-Jun-25

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