

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.95%) gained 44.3 points and closed at 4,709.09. The blue-chip index DS30 (+0.92%), the Shariah-based index DSES (+1.14%), and the large-cap index CDSET (+0.78%) closed at 1,762.37, 1,028.90, and 969.16 points, respectively. All the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 1.65% followed by Food & Allied (+1.52%), NBFI (+1.16%), Bank (+1.05%), Pharmaceutical (+0.76%), Engineering (+0.72%), and Telecommunication (+0.70%), respectively. Block trades contributed 7.1% of the overall market turnover. BRAC Bank Ltd. (+1.4%) was the most traded share with a turnover of BDT 223 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,709.09	4,664.79	+44.30	+0.95%	-9.7%
DS30	1,762.37	1,746.22	+16.15	+0.92%	-9.1%
DSES	1,028.90	1,017.32	+11.58	+1.14%	-12.0%
CDSET	969.16	961.63	+7.53	+0.78%	-9.1%

	Advanced	Declined	Unchanged	Total
All Category	277	55	64	396
A Category (Equity)	160	28	30	218
B Category (Equity)	63	11	10	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	54	16	24	94
Mutual Funds	12	5	19	36
Corporate Bonds	1	1	0	2
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,505,914	6,471,528	+0.5%
	Mn USD	52,903	52,624	
Turnover	Mn BDT	2,245	2,291	-2.0%
	Mn USD	18	19	
Volume	Mn Shares	83	98	-15.2%
No. of Trade		77,709	87,384	-11.1%

* Average Interbank Exchange Rate is BDT 122.98 as of Jun 04, 2025

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Md Rakibul Hasan
Research Associate

(880) 1708805229

rakibul.hasan@bracepl.com

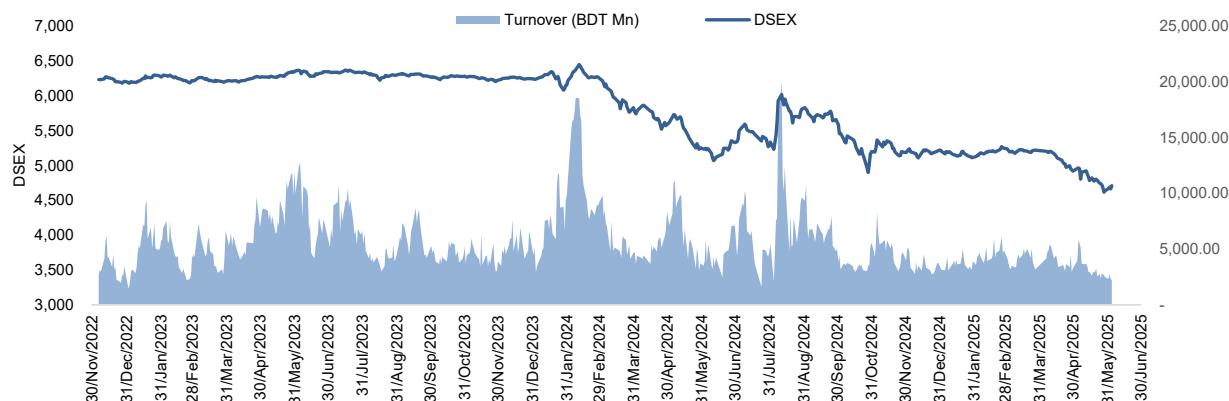


Figure: Sectorial Turnover (BDT Mn)

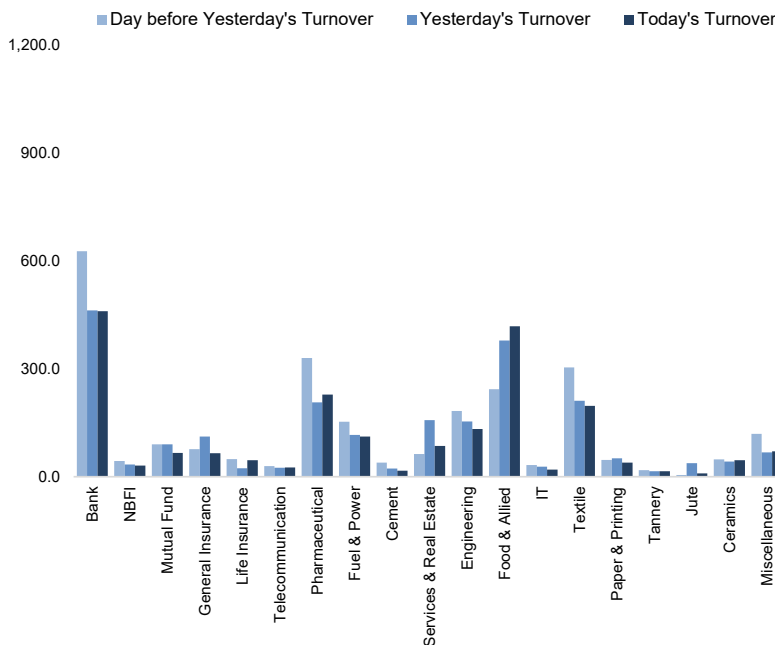
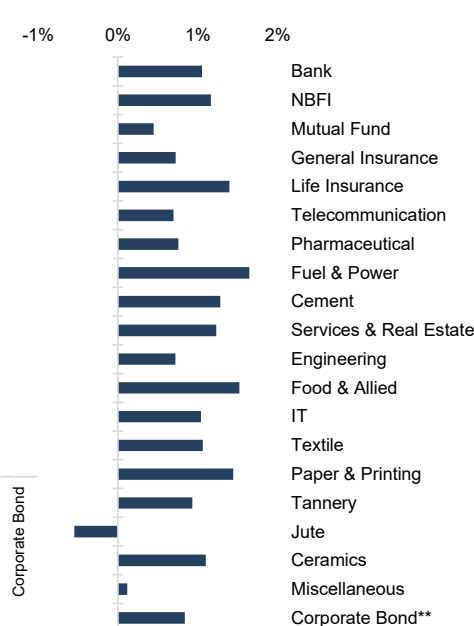


Figure: Sectorial Mcap Change



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	1,294	1,281	+13.49	+1.05%	36	612,415	9.4%	459.4	22.0%	17.8x	0.6x	GP	386,456	12.0%	12.7	13.2x	5.4x
NBFI	930	920	+10.71	+1.16%	23	88,641	1.4%	31.3	1.5%	NM	NM	SQURPHARMA	179,772	5.6%	77.8	7.6x	1.3x
Mutual Fund	615	613	+2.73	+0.45%	37	28,286	0.4%	66.2	3.2%	NM	0.5x	BATBC	144,180	4.5%	35.7	8.7x	2.7x
General Insurance	2,335	2,318	+16.75	+0.72%	43	66,597	1.0%	65.5	3.1%	11.2x	1.0x	ROBI	125,710	3.9%	12.8	17.4x	1.8x
Life Insurance	1,533	1,512	+21.10	+1.40%	15	40,767	0.6%	45.6	2.2%	NM	NM	WALTONHIL	120,990	3.8%	2.0	9.4x	1.1x
Telecommunication	4,554	4,522	+31.58	+0.70%	3	533,975	8.2%	25.8	1.2%	14.1x	3.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,711	2,691	+20.39	+0.76%	34	513,930	7.9%	228.1	10.9%	11.9x	1.4x	BRACBANK	97,555	3.0%	222.9	7.2x	1.2x
Fuel & Power	1,050	1,033	+17.00	+1.65%	23	278,064	4.3%	111.3	5.3%	17.5x	0.6x	BERGERPBL	80,340	2.5%	2.5	23.4x	5.5x
Cement	1,674	1,653	+21.22	+1.28%	7	79,792	1.2%	17.1	0.8%	19.1x	1.7x	MARICO	74,340	2.3%	8.5	12.6x	9.9x
Services & Real Estate	893	882	+10.86	+1.23%	9	49,087	0.8%	85.4	4.1%	22.6x	0.4x	UPGDCL	69,679	2.2%	4.1	6.0x	1.7x
Engineering	2,186	2,170	+15.64	+0.72%	42	246,607	3.8%	132.9	6.4%	11.3x	0.7x	ISLAMIBANK	54,096	1.7%	2.0	11.6x	0.7x
Food & Allied	13,680	13,475	+204.93	+1.52%	21	250,313	3.9%	418.1	20.0%	14.5x	4.0x	LHB	50,287	1.6%	9.6	14.0x	2.5x
IT	1,639	1,622	+16.89	+1.04%	11	21,619	0.3%	19.9	1.0%	18.2x	1.4x	UNILEVERCL	44,713	1.4%	0.3	76.9x	17.3x
Textile	982	972	+10.35	+1.06%	58	102,299	1.6%	196.7	9.4%	NM	0.7x	ICB	40,154	1.3%	7.1	NM	1.0x
Paper & Printing	3,885	3,829	+55.32	+1.44%	6	17,550	0.3%	39.3	1.9%	NM	0.8x	BXPHERMA	38,990	1.2%	15.2	6.1x	0.8x
Tannery	1,844	1,827	+17.04	+0.93%	6	20,546	0.3%	15.1	0.7%	63.2x	1.5x	DUTCHBANGL	37,798	1.2%	1.2	8.7x	0.7x
Jute	10,188	10,244	-55.92	-0.55%	3	2,243	0.0%	9.7	0.5%	NM	NM	EBL	35,746	1.1%	16.9	5.3x	0.7x
Ceramics	360	356	+3.92	+1.10%	5	16,140	0.2%	46.1	2.2%	NM	1.0x	PUBALIBANK	32,406	1.0%	1.5	4.1x	0.6x
Miscellaneous	4,103	4,098	+4.88	+0.12%	15	222,815	3.4%	70.2	3.4%	87.7x	1.8x	OLYMPIC	29,991	0.9%	7.2	16.2x	2.5x
Corporate Bond**	15,374	15,246	+127.84	+0.84%	16	33,672	0.5%	0.4	0.0%	NM	NM	CITYBANK	28,903	0.9%	31.5	2.9x	0.6x
Treasury Bond**	2,008	2,005	+3.03	+0.15%	235	3,264,711	50.3%	2.0	0.1%	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
SONARGAON	35.3	+9.6%	33.8	NM	1.8x	SQURPHARMA	108,958	7.7%	7.6x	1.3x	BRACBANK	49.0	+1.4%	222.9	7.2x	1.2x
SALAMCRST	21.2	+9.3%	30.8	NM	1.2x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	LOVELLO	88.7	+4.6%	188.0	40.0x	7.0x
TITASGAS	19.0	+7.3%	6.6	NM	0.2x	BEXIMCO	69,463	4.9%	NM	1.3x	FINEFOODS	227.6	+0.3%	105.8	51.3x	15.6x
SUNLIFEINS	63.3	+7.1%	24.4	NM	NM	BATBC	50,233	3.6%	8.7x	2.7x	SQURPHARMA	202.8	+0.4%	77.8	7.6x	1.3x
MLDYEING	9.1	+5.8%	15.7	39.6x	0.7x	WALTONHIL	46,773	3.3%	9.4x	1.1x	MIDLANDBNK	24.9	-0.8%	66.9	19.6x	1.7x
AFTABAUTO	29.3	+5.78%	10.5	NM	0.6x	BRACBANK	46,489	3.3%	7.2x	1.2x	SEAPEARL	49.3	+1.6%	64.1	NM	3.0x
EMERALDOIL	22.0	+5.8%	5.3	18.8x	NM	GP	44,708	3.2%	13.2x	5.4x	UTTARABANK	21.1	+1.9%	43.1	NM	0.6x
HRTEX	24.7	+5.1%	8.3	NM	8.3x	RENATA	32,968	2.3%	19.5x	1.6x	BEACHHATCH	41.5	+1.0%	40.5	8.8x	2.5x
ORIONPHARM	27.9	+4.9%	18.3	NM	0.3x	BXPHARMA	23,409	1.7%	6.1x	0.8x	MALEKSPIN	23.1	+0.9%	37.5	3.1x	0.4x
SPCERAMICS	21.7	+4.8%	31.6	NM	0.7x	PUBALIBANK	22,905	1.6%	4.1x	0.6x	BATBC	267.0	+0.8%	35.7	8.7x	2.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	2.9x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NORTHERN	90.0	-7.7%	0.1	NM	1.1x	LHB	20,953	1.5%	14.0x	2.5x	LOVELLO	86.4	81.0	15.0	1,011	84.26
PLFSL	1.8	-5.3%	0.8	NM	NM	OLYMPIC	20,496	1.5%	16.2x	2.5x	RELANCE1	17.9	17.0	4.0	600	10.29
SAFKOSPINN	9.2	-3.2%	0.3	NM	NM	ALARABANK	18,282	1.3%	35.8x	0.8x	FINEFOODS	215.0	207.3	4.0	34	7.12
GIB	3.1	-3.1%	0.5	5.9x	NM	BEACONPHAR	17,838	1.3%	28.3x	3.8x	GP	273.3	259.8	2.0	27	7.00
PHENIXINS	23.3	-2.9%	0.0	16.4x	0.7x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	ABB1STMF	4.6	4.5	2.0	1,500	6.85
SONARBAINS	20.3	-2.9%	2.1	NM	0.9x	ROBI	14,876	1.1%	17.4x	1.8x	KBPWBIL	118.0	118.0	1.0	41	4.84
POPULAR1MF	3.4	-2.9%	2.0	NM	0.4x	UTTARABANK	13,699	1.0%	NM	0.6x	INTRACO	18.8	18.8	1.0	210	3.95
GREENDELMF	3.8	-2.6%	0.2	NM	0.4x	NBL	13,055	0.9%	NM	8.2x	CENTRALINS	27.0	26.5	4.0	146	3.91
BAYLEASING	4.1	-2.4%	0.7	NM	1.2x	BSRMLTD	12,852	0.9%	4.2x	0.5x	ORIONINFU	332.0	332.0	1.0	10	3.32
DBH1STMF	4.3	-2.3%	0.1	NM	0.5x	* 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										

* 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
LOVELLO	86.4	81.0	84.3	1,011	15
RELIANCE1	17.9	17.0	10.3	600	4
FINEFOODS	215.0	207.3	7.1	34	4
GP	273.3	259.8	7.0	27	2
ABB1STMF	4.6	4.5	6.9	1,500	2
KBPPWBIL	118.0	118.0	4.8	41	1
INTRACO	18.8	18.8	3.9	210	1
CENTRALINS	27.0	26.5	3.9	146	4
ORIONINFU	332.0	332.0	3.3	10	1
SEAPEARL	45.0	45.0	2.4	54	2
AMANFEED	24.3	24.3	2.3	93	1
ROBI	21.5	21.5	2.2	100	1
SONALIANS	172.0	172.0	1.9	11	1
LHB	40.0	40.0	1.9	47	1
QUASEMIND	33.7	33.7	1.7	50	1
NATLIFEINS	84.0	84.0	1.5	18	1
IPDC	13.9	13.9	1.4	100	1
MIDLANDBNK	26.7	26.7	1.3	50	1
SEMLLECMF	10.8	10.3	1.1	106	2
HAKKANIPUL	62.0	55.8	1.0	18	2
DOMINAGE	11.2	11.2	1.0	90	1
AIBL1STMF	6.9	6.9	1.0	144	1
Total			158.8		60

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

Important DSE News

PRIMEFIN

(Q2 Un-audited): The company has resubmitted the Q2 financials as per specified format according to which: Consolidated EPS was Tk. (0.79) for April-June 2023 as against Tk. (0.43) for April-June 2022; Consolidated EPS was Tk. (1.08) for January-June 2023 as against Tk. (0.77) for January-June 2022. Consolidated NOCFPS was Tk. (0.46) for January-June 2023 as against Tk. 0.01 for January-June 2022. Consolidated NAV per share was Tk. 5.92 as on June 30, 2023 and Tk. 9.37 as on June 30, 2022.

(Q3 Un-audited): The company has resubmitted the Q3 financials as per specified format according to which: Consolidated EPS was Tk. (0.61) for July-September 2023 as against Tk. (0.48) for July-September 2022; Consolidated EPS was Tk. (1.69) for Jan-Sep 2023 as against Tk. (1.25) for Jan-Sep 2022. Consolidated NOCFPS was Tk. (0.45) for January-September 2023 as against Tk. (0.03) for January-September 2022. Consolidated NAV per share was Tk. 5.31 as on September 30, 2023 and Tk. 8.89 as on September 30, 2022.

RUNNERAUTO

In response to a DSE query letter to the company dated May 28, 2025, regarding a news published in a newspaper titled "Runner to take 'eco-friendly' two-wheeler market share with Chinese scooters" on May 26, 2025, the company has submitted clarification vide its letter dated June 01, 2025.

NCCBANK

Alhaj Md. Nurun Newaz, a Sponsor Director of the Company, has further informed that he has completed his selling of 30,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated by DSE on 20.05.2025.

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.