

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.34%) lost 16.21 points and closed at 4,785.12. The blue-chip index DS30 (-0.26%), the Shariah-based index DSES (-0.32%), and the large-cap index CDSET (-0.43%) closed at 1,777.10, 1,046.90, and 982.87 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 1.73% followed by NBF1 (-0.68%), Food & Allied (-0.68%), Bank (-0.45%), Pharmaceutical (-0.22%), Engineering (-0.16%), and Fuel & Power (-0.11%), respectively. Block trades contributed 2.8% of the overall market turnover. Beach Hatchery Ltd. (-3.4%) was the most traded share with a turnover of BDT 149 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,785.12	4,801.32	-16.21	-0.34%	-8.3%
DS30	1,777.10	1,781.66	-4.56	-0.26%	-8.4%
DSES	1,046.90	1,050.25	-3.35	-0.32%	-10.4%
CDSET	982.87	987.15	-4.28	-0.43%	-7.8%

	Advanced	Declined	Unchanged	Total
All Category	114	200	77	391
A Category (Equity)	52	128	32	212
B Category (Equity)	24	49	9	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	38	23	36	97
Mutual Funds	2	21	13	36
Corporate Bonds	1	2	0	3
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,490,900	6,511,766	-0.3%
	Mn USD	52,970	53,140	
Turnover	Mn BDT	2,535	3,263	-22.3%
	Mn USD	21	27	
Volume	Mn Shares	112	153	-27.0%
No. of Trade		103,600	110,181	-6.0%

\* Average Interbank Exchange Rate is BDT 122.54 as of May 22, 2025

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Md Rakibul Hasan</b> Research Associate (880) 1708805229 rakibul.hasan@bracepl.com
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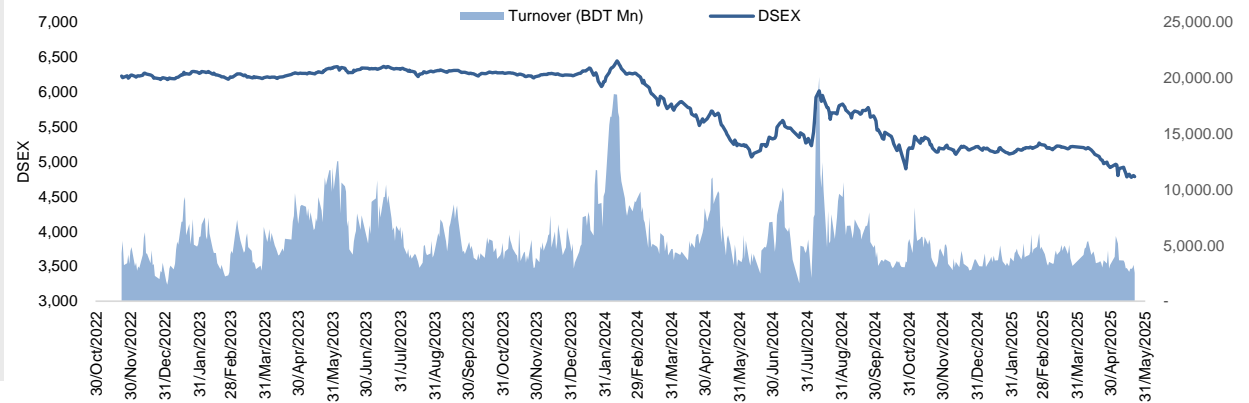


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

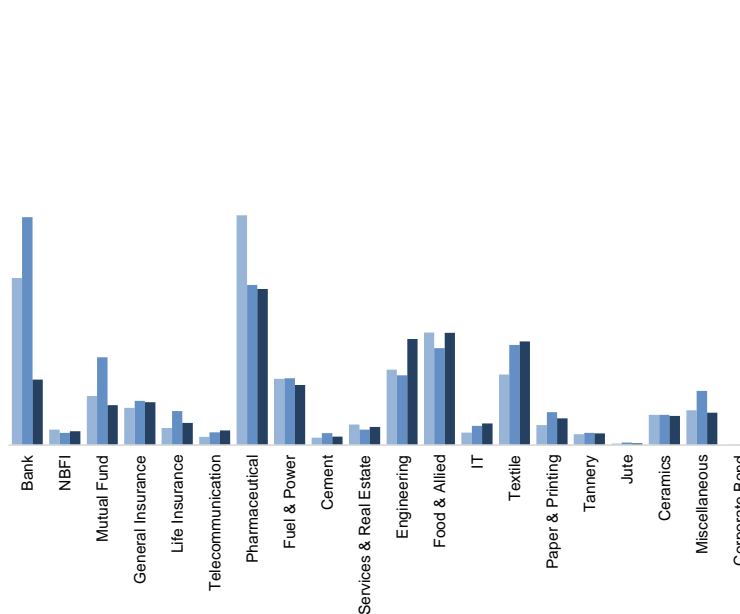
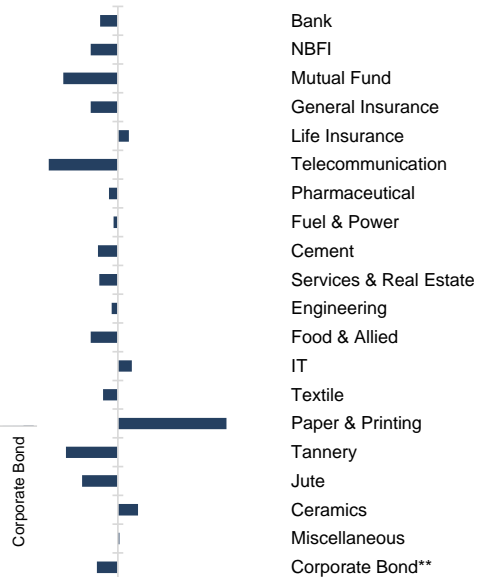


Figure: Sectorial Mcap Change

-2% 0% 2% 4%



Market PE 14.3x

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	1,323	1,329	-5.93	-0.45%	36	625,878	9.7%	181.5	7.4%	6.7x	0.6x	GP	380,650	11.8%	25.8	13.0x	5.4x
NBFI	918	924	-6.31	-0.68%	23	87,451	1.4%	38.3	1.6%	NM	NM	SQURPHARMA	184,027	5.7%	101.0	7.8x	1.4x
Mutual Fund	632	640	-8.75	-1.37%	37	29,025	0.5%	110.7	4.5%	NM	0.6x	BATBC	150,984	4.7%	28.3	9.1x	2.9x
General Insurance	2,411	2,428	-16.50	-0.68%	43	68,836	1.1%	118.8	4.8%	11.5x	1.0x	ROBI	125,710	3.9%	14.4	17.4x	1.8x
Life Insurance	1,567	1,563	+4.31	+0.28%	15	41,688	0.6%	61.7	2.5%	NM	NM	WALTONHIL	122,504	3.8%	2.5	9.5x	1.1x
Telecommunication	4,511	4,590	-79.64	-1.73%	3	528,936	8.2%	40.7	1.7%	14.0x	3.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,766	2,772	-6.20	-0.22%	34	524,329	8.1%	433.8	17.6%	12.1x	1.4x	BRACBANK	93,441	2.9%	46.6	6.9x	1.1x
Fuel & Power	1,036	1,038	-1.14	-0.11%	23	274,531	4.3%	166.7	6.8%	17.3x	0.6x	BERGERPBL	82,117	2.5%	1.2	23.9x	5.7x
Cement	1,688	1,696	-8.42	-0.50%	7	80,427	1.2%	23.3	0.9%	19.2x	1.7x	MARICO	77,348	2.4%	11.8	13.1x	10.3x
Services & Real Estate	886	890	-4.12	-0.46%	9	48,702	0.8%	50.2	2.0%	23.1x	0.4x	UPGDCL	69,042	2.1%	3.1	5.9x	1.6x
Engineering	2,199	2,203	-3.48	-0.16%	42	248,085	3.8%	294.4	11.9%	11.4x	0.8x	ISLAMIBANK	54,257	1.7%	4.4	11.6x	0.7x
Food & Allied	13,769	13,863	-94.51	-0.68%	21	251,933	3.9%	311.3	12.6%	14.6x	4.0x	LHB	51,100	1.6%	13.6	14.2x	2.6x
IT	1,666	1,660	+5.78	+0.35%	11	21,974	0.3%	60.2	2.4%	18.5x	1.4x	UNILEVERCL	41,465	1.3%	0.0	71.3x	16.1x
Textile	997	1,001	-3.70	-0.37%	58	103,875	1.6%	288.1	11.7%	NM	0.7x	BXPHARMA	39,704	1.2%	28.5	6.2x	0.8x
Paper & Printing	3,911	3,808	+103.48	+2.72%	6	17,669	0.3%	74.1	3.0%	NM	0.8x	DUTCHBANGL	37,438	1.2%	0.0	8.6x	0.7x
Tannery	1,840	1,864	-24.24	-1.30%	6	20,502	0.3%	32.7	1.3%	63.0x	1.5x	ICB	35,991	1.1%	3.1	NM	0.9x
Jute	9,879	9,969	-89.40	-0.90%	3	2,175	0.0%	5.0	0.2%	NM	NM	EBL	35,267	1.1%	3.8	5.2x	0.7x
Ceramics	357	355	+1.79	+0.50%	5	16,014	0.2%	80.7	3.3%	NM	1.0x	PUBALIBANK	32,970	1.0%	0.0	4.2x	0.6x
Miscellaneous	4,143	4,141	+1.66	+0.04%	15	224,972	3.5%	90.0	3.7%	88.6x	1.8x	CITYBANK	30,830	1.0%	0.0	3.1x	0.6x
Corporate Bond**	14,937	15,017	-79.49	-0.53%	16	32,715	0.5%	1.6	0.1%	NM	NM	OLYMPIC	28,891	0.9%	4.2	15.6x	2.4x
Treasury Bond**	1,962	1,964	-1.58	-0.08%	234	3,195,107	49.6%	0.5	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					
NTC	164.2	+10.0%	0.7	NM	NM	SQURPHARMA	108,958	7.7%	7.8x	1.4x	BEACHHATCH	45.4	-3.4%	149.3	9.7x	2.8x					
SONARGAON	41.3	+9.8%	49.4	NM	2.1x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	ORIONINFU	364.7	-2.7%	115.6	NM	23.2x					
BPML	32.7	+9.7%	21.0	NM	0.5x	BEXIMCO	69,463	4.9%	NM	1.3x	SQURPHARMA	207.6	-0.9%	101.0	7.8x	1.4x					
BENGALWTL	19.2	+9.7%	30.6	34.3x	0.7x	BATBC	50,233	3.6%	9.1x	2.9x	BSC	89.3	-1.0%	60.1	4.5x	0.9x					
HRTEX	26.5	+8.6%	36.0	NM	8.9x	WALTONHIL	46,773	3.3%	9.5x	1.1x	SALAMCRST	19.5	+7.1%	59.9	NM	1.1x					
SALAMCRST	19.5	+7.14%	59.9	NM	1.1x	BRACBANK	46,489	3.3%	6.9x	1.1x	SONARGAON	41.3	+9.8%	49.4	NM	2.1x					
BEACONPHAR	111.2	+6.3%	20.4	30.0x	4x	GP	44,708	3.2%	13.0x	5.4x	SPCERAMICS	21.2	+1.9%	49.3	NM	0.7x					
ANWARGALV	56.9	+5.4%	19.2	NM	28.5x	RENATA	32,968	2.3%	19.8x	1.6x	AIL	46.1	-0.9%	47.4	17.0x	1.9x					
ORIONPHARM	27.0	+5.1%	11.4	NM	0.3x	BXPHARMA	23,409	1.7%	6.2x	0.8x	BRACBANK	52.8	-1.7%	46.6	6.9x	1.1x					
BIFC	6.3	+5.0%	0.0	NM	NM	PUBALIBANK	22,905	1.6%	4.2x	0.6x	FUWANGFOOL	14.0	-2.1%	40.0	NM	6.1x					
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	LHB	OLYMPIC	ALARABANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNITEDFIN	12.0	-8.4%	5.3	10.5x	0.7x	21,020	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	UTTARABANK	19.1	19.1	1.0	600	11.46
DULAMACOT	66.8	-5.8%	0.5	NM	NM	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	GP	313.5	294.2	2.0	27	8.34
IFIC1STMF	3.6	-5.3%	5.3	NM	0.4x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	IFIC	6.2	6.2	1.0	1,020	6.32
ESQUIRENIT	21.7	-5.2%	25.1	9.3x	0.3x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	SHYAMPSUG	136.5	128.0	4.0	43	5.80
BGIC	30.5	-4.7%	4.3	21.3x	1.5x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	AAMRANET	16.0	16.0	1.0	360	5.76
FAREASTLIF	26.4	-3.6%	2.3	NM	NM	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	LOVELLO	77.0	75.0	2.0	73	5.46
BEACHHATCH	45.4	-3.4%	149.3	9.7x	2.8x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	INTRACO	23.5	23.5	1.0	210	4.94
SEMLFBSLGF	5.7	-3.4%	1.1	NM	0.5x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	PURABIGEN	17.0	17.0	1.0	180	3.06
PRAGATIINS	45.5	-3.2%	0.1	8.1x	0.8x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	GLOBALINS	28.5	28.5	1.0	100	2.85
NURANI	3.2	-3.0%	0.1	NM	0.3x	1.5%	1.5%	1.5%	1.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	BEACONPHAR	114.9	114.9	2.0	23	2.69
<div>* 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</div>																					

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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
UTTARABANK	19.1	19.1	11.5	600	1
GP	313.5	294.2	8.3	27	2
IFIC	6.2	6.2	6.3	1,020	1
SHYAMPSUG	136.5	128.0	5.8	43	4
AAMRANET	16.0	16.0	5.8	360	1
LOVELLO	77.0	75.0	5.5	73	2
INTRACO	23.5	23.5	4.9	210	1
PURABIGEN	17.0	17.0	3.1	180	1
GLOBALINS	28.5	28.5	2.9	100	1
BEACONPHAR	114.9	114.9	2.7	23	2
PREMIERBAN	8.3	8.3	2.5	300	2
ICBSONALI1	6.6	6.0	2.5	390	2
FINEFOODS	211.0	211.0	2.1	10	1
ISLAMIBANK	35.0	35.0	1.7	48	1
CVOPRL	136.5	136.5	1.6	12	2
BEACHHATCH	51.5	51.5	1.4	28	1
KPPL	17.6	17.6	0.9	50	1
NRBCBANK	8.1	8.1	0.8	100	1
SUNLIFEINS	69.9	69.9	0.6	9	1
LHB	42.4	42.4	0.5	12	1

<b>Total</b>		<b>71.2</b>	<b>29</b>
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#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
STANDARINS		0.0%	10.0%	Record Date	22-May-25
MTB		10.0%	0.0%	Record Date	22-May-25
MIDLANDBNK		3.0%	3.0%	Record Date	22-May-25
DUTCHBANGL		10.0%	10.0%	Record Date	22-May-25
PUBALIBANK		12.5%	12.5%	Record Date	22-May-25
CITYBANK		12.5%	12.5%	Record Date	22-May-25
SHAHJABANK		0.0%	10.0%	Record Date	22-May-25
CENTRALINS		0.0%	12.0%	Record Date	25-May-25
BRACBANK		12.5%	12.5%	Record Date	25-May-25
EIL		0.0%	5.0%	Record Date	25-May-25
REPUBLIC		5.0%	6.0%	Record Date	25-May-25
BATASHOE		0.0%	105.0%	Record Date	26-May-25
MARICO		0.0%	1950.0%	Record Date	26-May-25
NCCBANK		0.0%	13.0%	Record Date	26-May-25
BANKASIA		10.0%	10.0%	Record Date	26-May-25

#### Important DSE News

##### OLYMPIC

The company has informed that the Board of Directors of the company in its meeting held on May 21, 2025 has taken the following decision: To purchase and import of Brand-New Multi Color Cookies Production Line with Standard Accessories having total Production Capacity of 9,048 Metric Tons annually, from M/s. Zhongshan Dingson Food Machinery LTD., No.13, Teng Yun Road, Tanzhou Town, Zhongshan City, Guangdong Province, China for total US\$ 10,81,500/- equivalent to around Tk. 13,19,43,000/- (Thirteen Crore Nineteen Lac Forty Three Thousand) and installation and commissioning of the same at Madanpur Factory, Keodhala, Madanpur Bondar under District- Narayanganj.

##### REPUBLIC

Referring to their earlier news disseminated by DSE on 04.05.2025 regarding Dividend Declaration, the company has informed that approval of BSEC is not required for the company as per applicable BSEC Notification. Hence, the company has withdrawn their application submitted to BSEC regarding approval for issuance of Stock Dividend. As such the record date declared on May 25, 2025 will remain same for entitlement of stock dividend.

##### RUNNERAUTO

The company has informed that Board of Directors in its meeting held on April 24, 2025 has given consent to the proposal for acquisition of 374 decimals land situated at Sreepur, Magura and 407 decimals land at Bhaluka, Mymensingh for strategic business expansion. The Board has also given consent for selling of 552 decimals land situated at Boradoba, Mymensingh for strategic business purpose. DSE has sought explanation from the company for delayed submission of the information.

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