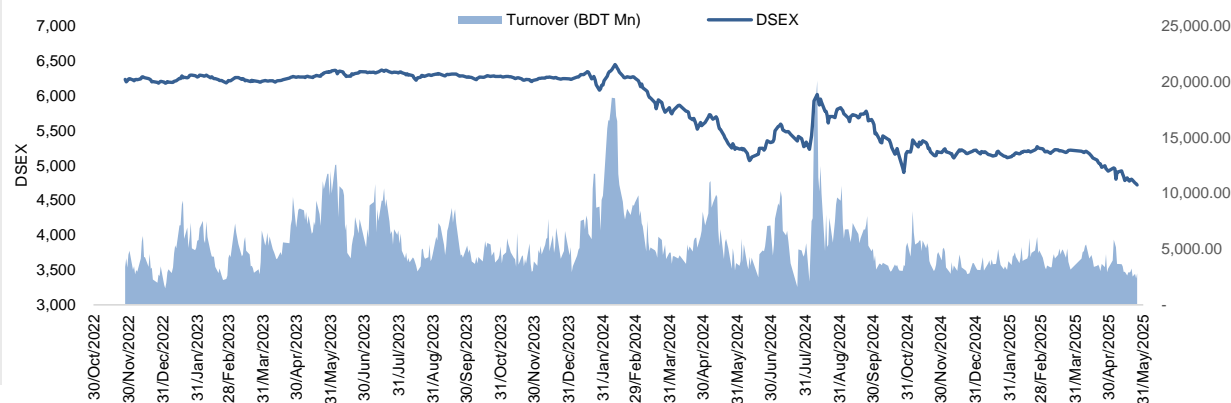


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.36%) lost 16.95 points and closed at 4,719.39. The blue-chip index DS30 (-0.26%), the Shariah-based index DSES (+0.07%), and the large-cap index CDSET (-0.39%) closed at 1,741.92, 1,033.32, and 966.45 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.88% followed by Telecommunication (-0.64%), Pharmaceutical (-0.61%), Fuel & Power (-0.49%), Bank (-0.47%), NBFi (-0.02%), and Engineering (+0.17%), respectively. Block trades contributed 4.6% of the overall market turnover. Square Pharmaceuticals Ltd. (-1.7%) was the most traded share with a turnover of BDT 113 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,719.39	4,736.34	-16.95	-0.36%	-9.5%
DS30	1,741.92	1,746.53	-4.61	-0.26%	-10.2%
DSES	1,033.32	1,032.56	+0.77	+0.07%	-11.6%
CDSET	966.45	970.24	-3.79	-0.39%	-9.3%

1,200.0

Figure: Sectorial Turnover (BDT Mn)

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

900.0

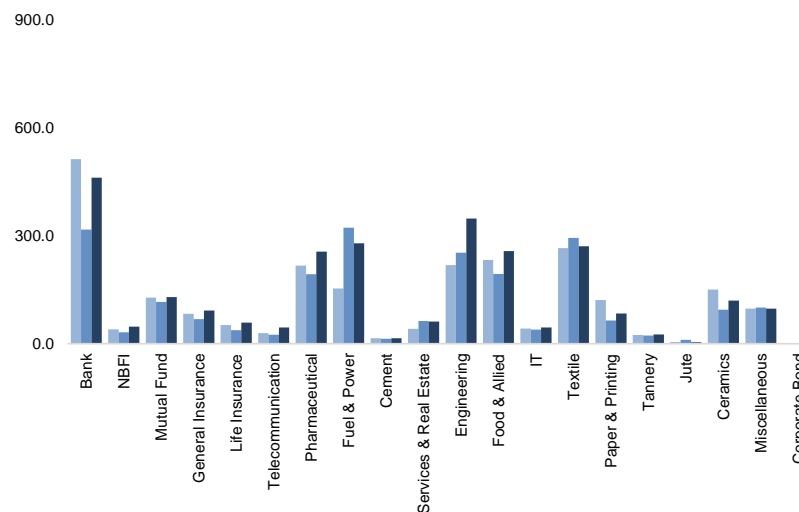
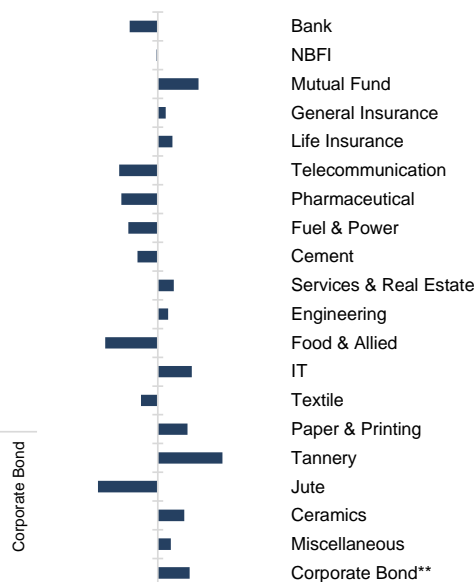


Figure: Sectorial Mcap Change

-2% -1% 0% 1% 2%



Market PE 15.0x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

	Advanced	Declined	Unchanged	Total
All Category	148	168	77	393
A Category (Equity)	77	100	36	213
B Category (Equity)	38	39	6	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	33	29	35	97
Mutual Funds	12	6	18	36
Corporate Bonds	2	1	0	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,500,672	6,505,923	-0.1%
	Mn USD	52,909	52,952	
Turnover	Mn BDT	2,826	2,355	+20.0%
	Mn USD	23	19	
Volume	Mn Shares	145	120	+20.5%
	No. of Trade	107,491	97,640	+10.1%

* Average Interbank Exchange Rate is BDT 122.86 as of May 26, 2025

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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	1,309	1,315	-6.19	-0.47%	36	619,243	9.5%	460.8	17.1%	6.7x	0.6x	GP	366,201	11.5%	16.6	12.5x	5.2x
NBFI	905	905	-0.20	-0.02%	23	86,227	1.3%	47.4	1.8%	NM	NM	SQURPHARMA	180,393	5.7%	112.7	7.7x	1.3x
Mutual Fund	622	618	+4.22	+0.68%	37	28,607	0.4%	129.2	4.8%	NM	0.5x	BATBC	144,504	4.5%	21.9	8.7x	2.7x
General Insurance	2,350	2,347	+3.16	+0.13%	43	67,094	1.0%	92.2	3.4%	11.2x	1.0x	ROBI	123,091	3.9%	25.0	17.0x	1.8x
Life Insurance	1,546	1,542	+3.76	+0.24%	15	41,106	0.6%	58.9	2.2%	NM	NM	WALTONHIL	121,535	3.8%	3.9	9.4x	1.1x
Telecommunication	4,361	4,389	-28.30	-0.64%	3	511,326	7.9%	45.2	1.7%	13.5x	3.3x	BEXIMCO	103,850	3.3%	0.0	NM	1.3x
Pharmaceutical	2,729	2,746	-16.69	-0.61%	34	517,363	8.0%	256.0	9.5%	11.9x	1.4x	BRACBANK	93,175	2.9%	88.4	6.9x	1.1x
Fuel & Power	1,029	1,035	-5.10	-0.49%	23	272,710	4.2%	278.8	10.3%	17.2x	0.6x	BERGERPBL	82,311	2.6%	1.5	24.0x	5.7x
Cement	1,663	1,669	-5.65	-0.34%	7	79,267	1.2%	15.6	0.6%	19.0x	1.7x	MARICO	77,865	2.4%	0.0	13.2x	10.3x
Services & Real Estate	882	880	+2.36	+0.27%	9	48,516	0.7%	61.6	2.3%	22.3x	0.4x	UPGDCL	68,172	2.1%	0.8	5.8x	1.6x
Engineering	2,190	2,187	+3.77	+0.17%	42	247,088	3.8%	347.7	12.9%	11.3x	0.7x	ISLAMIBANK	53,935	1.7%	4.9	11.6x	0.7x
Food & Allied	13,358	13,476	-118.12	-0.88%	21	244,411	3.8%	256.9	9.5%	14.1x	3.9x	LHB	50,868	1.6%	8.2	14.2x	2.5x
IT	1,640	1,631	+9.30	+0.57%	11	21,635	0.3%	45.1	1.7%	18.2x	1.4x	UNILEVERCL	40,896	1.3%	0.1	70.3x	15.8x
Textile	988	990	-2.78	-0.28%	58	102,848	1.6%	270.6	10.0%	NM	0.7x	BXPHARMA	38,053	1.2%	23.7	5.9x	0.8x
Paper & Printing	3,944	3,925	+19.53	+0.50%	6	17,819	0.3%	84.0	3.1%	NM	0.8x	DUTCHBANGL	36,928	1.2%	1.2	8.5x	0.7x
Tannery	1,887	1,867	+20.18	+1.08%	6	21,022	0.3%	26.1	1.0%	64.6x	1.5x	ICB	36,165	1.1%	4.4	NM	0.9x
Jute	9,609	9,706	-96.83	-1.00%	3	2,115	0.0%	3.8	0.1%	NM	NM	EBL	35,587	1.1%	10.4	5.2x	0.7x
Ceramics	362	361	+1.60	+0.44%	5	16,254	0.3%	120.0	4.5%	NM	1.0x	PUBALIBANK	31,755	1.0%	3.9	4.0x	0.6x
Miscellaneous	4,139	4,130	+8.95	+0.22%	15	224,746	3.5%	97.1	3.6%	88.5x	1.8x	OLYMPIC	28,751	0.9%	3.8	15.5x	2.4x
Corporate Bond**	14,984	14,904	+79.63	+0.53%	16	32,817	0.5%	0.5	0.0%	NM	NM	CITYBANK	28,295	0.9%	27.2	2.8x	0.6x
Treasury Bond**	2,026	2,022	+4.18	+0.21%	235	3,297,769	50.7%	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
BBSCABLES	15.4	+10.0%	24.3	NM	0.5x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	SQURPHARMA	203.5	-1.7%	112.7	7.7x	1.3x
NAHEEACP	20.7	+9.5%	28.0	76.7x	1.1x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	BPPL	16.2	+1.9%	101.0	70.4x	0.6x
STANDARINS	38.1	+9.5%	28.3	16.4x	1.7x	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	46.8	+1.4%	88.4	6.9x	1.1x
FAREASTFIN	4.7	+9.3%	6.0	NM	NM	BATBC	50,233	3.6%	8.7x	2.7x	SPCERAMICS	22.7	+1.8%	86.0	NM	0.8x
RELIANCE1	18.4	+6.4%	21.9	NM	1.7x	WALTONHIL	46,773	3.3%	9.4x	1.1x	MIDLANDBNK	26.7	-1.1%	82.9	21.0x	1.8x
BBS	10.5	+6.06%	18.3	NM	0.9x	BRACBANK	46,489	3.3%	6.9x	1.1x	BEACHHATCH	44.7	-1.1%	75.5	9.5x	2.7x
SALAMCRST	22.8	+6.0%	75.1	NM	1x	GP	44,708	3.2%	12.5x	5.2x	SALAMCRST	22.8	+6.0%	75.1	NM	1.2x
FORTUNE	15.0	+5.6%	7.6	NM	1.1x	RENATA	32,968	2.3%	19.7x	1.6x	NRRBANK	10.4	-7.1%	69.1	17.1x	0.8x
DESHBANDHU	17.1	+5.6%	22.0	NM	1.0x	BXPHARMA	23,409	1.7%	5.9x	0.8x	UTTARABANK	20.2	+0.5%	52.5	7.1x	0.6x
EASTRNLAB	2,247.0	+5.0%	30.9	53.6x	11.7x	PUBALIBANK	22,905	1.6%	4.0x	0.6x	SONARGAON	42.5	-0.7%	44.1	NM	2.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	14.2x	2.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ONEBANKPLC	7.0	-7.9%	28.0	4.8x	0.3x	OLYMPIC	20,496	1.5%	15.5x	2.4x	MIDLANDBNK	27.1	25.5	6.0	807	20.67
NRRBANK	10.4	-7.1%	69.1	17.1x	1x	ALARABANK	18,282	1.3%	13.7x	1.0x	LOVELLO	86.5	75.0	6.0	177	14.02
SBACBANK	7.3	-6.4%	6.7	4.8x	0.5x	BEACONPHAR	17,838	1.3%	30.1x	4.0x	FINEFOODS	220.0	209.0	7.0	66	13.92
SEMLLECMF	11.4	-5.8%	10.1	NM	1.3x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	SEMLLECMF	12.8	12.0	4.0	899	11.34
UCB	10.2	-4.7%	7.3	3.5x	0.4x	ROBI	14,876	1.1%	17.0x	1.8x	EIL	50.0	49.0	3.0	200	9.91
UTTARAFIN	12.3	-4.7%	0.0	NM	0.2x	UTTARABANK	13,699	1.0%	7.1x	0.6x	SQURPHARMA	225.0	225.0	1.0	42	9.35
NTC	154.0	-4.6%	0.8	NM	NM	NBL	13,055	0.9%	NM	7.8x	EASTRNLAB	2,170.0	2,158.0	3.0	4	8.31
JUTESPINN	197.5	-4.6%	0.1	NM	NM	BSRMLTD	12,852	0.9%	4.1x	0.4x	RELIANCE1	17.3	17.3	4.0	437	7.56
PREMIERCEM	46.7	-4.5%	4.4	18.6x	0.7x						AL-HAJTEX	133.9	119.0	6.0	37	4.57
SONALILIFE	45.0	-4.3%	0.3	NM	NM						LHB	40.0	40.0	1.0	90	3.60

* 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
MIDLANDBNK	27.1	25.5	20.7	807	6
LOVELLO	86.5	75.0	14.0	177	6
FINEFOODS	220.0	209.0	13.9	66	7
SEMLLECMF	12.8	12.0	11.3	899	4
EIL	50.0	49.0	9.9	200	3
SQURPHARMA	225.0	225.0	9.3	42	1
EASTRNLU	2,170.0	2,158.0	8.3	4	3
RELIANCE1	17.3	17.3	7.6	437	4
AL-HAJTEX	133.9	119.0	4.6	37	6
LHB	40.0	40.0	3.6	90	1
POWERGRID	28.0	28.0	2.7	95	1
PURABIGEN	17.0	17.0	2.6	150	1
SHEPHERD	16.0	16.0	2.4	150	1
SIBL	9.0	8.6	2.1	244	2
JAMUNABANK	15.0	15.0	1.8	118	1
PRIMEINSUR	24.3	24.3	1.5	62	1
TECHNODRUG	29.4	29.4	1.5	50	1
SANDHANINS	19.4	19.4	1.5	75	1
GLOBALINS	29.0	29.0	1.5	50	1
MONNOCERA	81.0	72.0	1.4	19	2
INTECH	19.6	19.6	1.2	63	1
BXPBARMA	89.7	89.7	1.2	13	2
Total			128.8		62

Important DSE News

ONEBANKPLC

The Board of Directors has recommended No Dividend for the year ended December 31, 2024. Date of AGM: 14.08.2025, Time: 11:00 AM, Venue: Hybrid System; physical presence at Lakeshore Grand, House-46, Road-41, Gulshan-2, Dhaka-1212. Record date: 24.06.2025. The Company has also reported Consolidated EPS of Tk. 1.24, Consolidated NAV per share of Tk. 22.43 and Consolidated NOCFPS of Tk. 6.84 for the year ended December 31, 2024 as against Tk. 1.09 (restated), Tk. 21.71 (restated) and Tk. 0.67 (restated) respectively for the year ended December 31, 2023.

(Q1 Un-audited): Consolidated EPS was Tk. 0.61 for January-March 2025 as against Tk. 0.39 (restated) for January-March 2024. Consolidated NOCFPS was Tk. 1.21 for January-March 2025 as against Tk. 0.06 (restated) for January-March 2024. Consolidated NAV per share was Tk. 22.75 as on March 31, 2025 and Tk. 22.43 as on December 31, 2024.

BDSERVICE

(Q3 Un-audited): EPS was Tk. (2.31) for January-March 2025 as against Tk. (0.54) for January-March 2024; EPS was Tk. (7.63) for July 2024-March 2025 as against Tk. (5.71) for July 2023-March 2024. NOCFPS was Tk. 1.96 for July 2024-March 2025 as against Tk. 0.28 for July 2023-March 2024. NAV per share was Tk. 220.63 as on March 31, 2025 and Tk. 228.26 as on June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
EASTERNINS		0.0%	15.0%	Record Date	27-May-25
MERCINS		0.0%	10.0%	Record Date	27-May-25
PLFSL		0.0%	0.0%	Record Date	27-May-25
DBH		15.0%	2.0%	Record Date	27-May-25
IDLC		5.0%	15.0%	Record Date	27-May-25
IPDC		5.0%	0.0%	Record Date	27-May-25
MEGHNAINS		0.0%	10.0%	Record Date	28-May-25
PROVATIINS		0.0%	10.0%	Record Date	28-May-25
KARNAPHULI		0.0%	10.0%	Record Date	28-May-25
RUPALIINS		0.0%	10.0%	Record Date	29-May-25
TRUSTBANK		7.5%	7.5%	Record Date	29-May-25

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