

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.87%) lost 41.25 points and closed at 4,678.13. The blue-chip index DS30 (-1.02%), the Shariah-based index DSES (-0.86%), and the large-cap index CDSET (-1.03%) closed at 1,724.18, 1,024.44, and 956.54 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 1.77% followed by Food & Allied (-1.61%), Engineering (-1.10%), Bank (-0.57%), Fuel & Power (-0.39%), Telecommunication (+0.06%), and NBFI (+3.80%), respectively. Block trades contributed 6.5% of the overall market turnover. BRAC Bank Ltd. (-1.9%) was the most traded share with a turnover of BDT 110 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,678.13	4,719.39	-41.25	-0.87%	-10.3%
DS30	1,724.18	1,741.92	-17.74	-1.02%	-11.1%
DSES	1,024.44	1,033.32	-8.89	-0.86%	-12.4%
CDSET	956.54	966.45	-9.91	-1.03%	-10.3%

	Advanced	Declined	Unchanged	Total
All Category	83	237	72	392
A Category (Equity)	49	125	39	213
B Category (Equity)	17	54	12	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	17	58	21	96
Mutual Funds	1	14	21	36
Corporate Bonds	1	1	0	2
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,463,445	6,500,672	-0.6%
	Mn USD	52,586	52,889	
Turnover	Mn BDT	2,727	2,826	-3.5%
	Mn USD	22	23	
Volume	Mn Shares	155	145	+7.2%
	No. of Trade	105,988	107,491	-1.4%

* Average Interbank Exchange Rate is BDT 122.91 as of May 27, 2025

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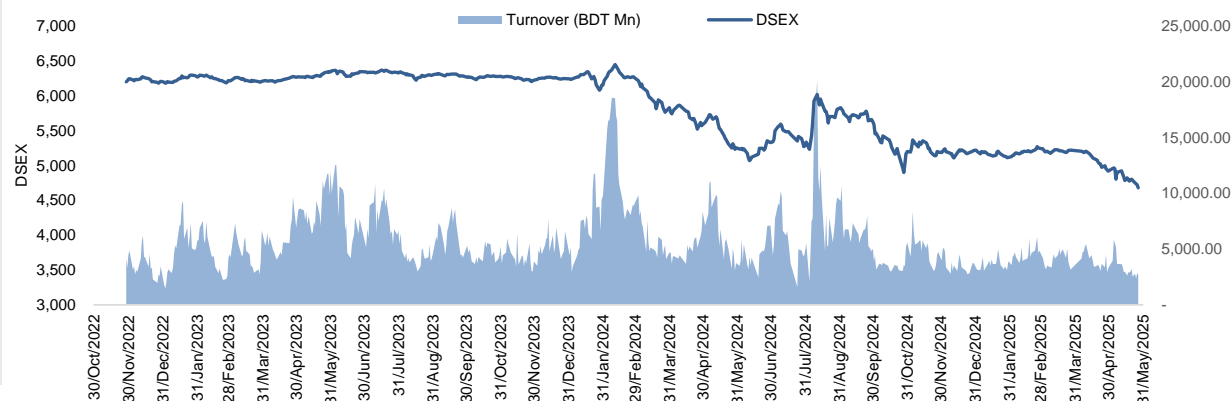


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

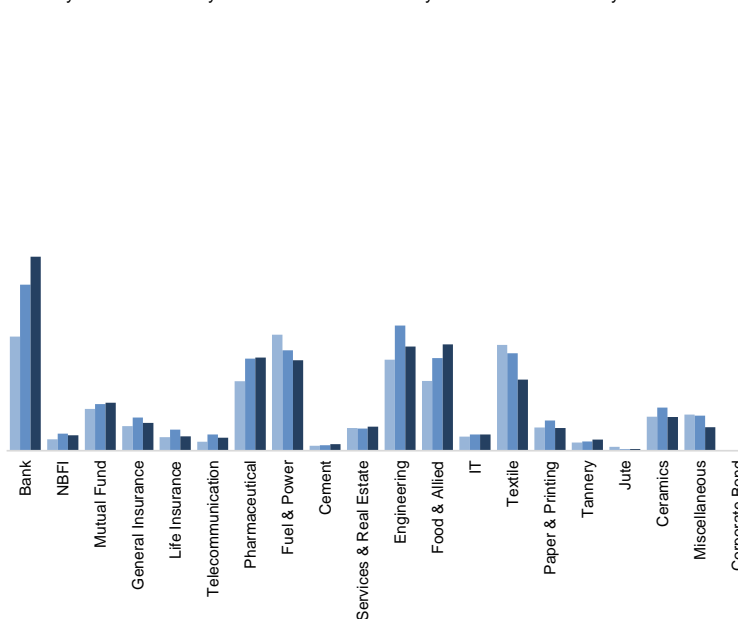
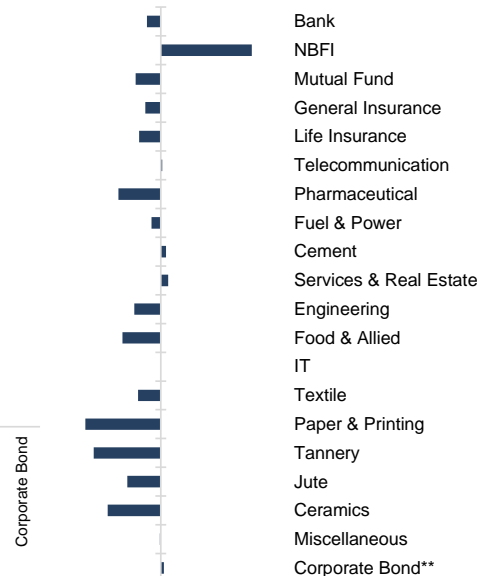


Figure: Sectorial Mcap Change

-5% 0% 5%



Market PE 14.9x

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	1,301	1,309	-7.51	-0.57%	36	615,690	9.5%	538.7	21.1%	6.7x	0.6x	GP	369,442	11.7%	18.2	12.6x	5.2x
NBFI	939	905	+34.42	+3.80%	23	89,506	1.4%	43.1	1.7%	NM	NM	SQURPHARMA	177,556	5.6%	106.8	7.6x	1.3x
Mutual Fund	616	622	-6.54	-1.05%	37	28,306	0.4%	133.5	5.2%	NM	0.5x	BATBC	140,562	4.4%	46.6	8.5x	2.7x
General Insurance	2,335	2,350	-15.14	-0.64%	43	66,597	1.0%	77.4	3.0%	11.2x	1.0x	ROBI	120,996	3.8%	15.3	16.7x	1.7x
Life Insurance	1,532	1,546	-14.01	-0.91%	15	40,734	0.6%	40.3	1.6%	NM	NM	WALTONHIL	119,021	3.8%	3.6	9.2x	1.0x
Telecommunication	4,363	4,361	+2.75	+0.06%	3	511,649	7.9%	36.3	1.4%	13.5x	3.3x	BEXIMCO	103,850	3.3%	0.0	NM	1.3x
Pharmaceutical	2,681	2,729	-48.41	-1.77%	34	508,185	7.9%	258.6	10.1%	11.7x	1.4x	BRACBANK	91,384	2.9%	110.3	6.7x	1.1x
Fuel & Power	1,026	1,029	-3.97	-0.39%	23	271,657	4.2%	251.5	9.9%	17.1x	0.6x	BERGERPBL	82,311	2.6%	2.0	24.0x	5.7x
Cement	1,667	1,663	+3.63	+0.22%	7	79,440	1.2%	18.2	0.7%	19.0x	1.7x	MARICO	73,971	2.3%	1.1	12.5x	9.8x
Services & Real Estate	885	882	+2.70	+0.31%	9	48,664	0.8%	66.7	2.6%	22.4x	0.4x	UPGDCL	67,824	2.1%	1.1	5.8x	1.6x
Engineering	2,166	2,190	-24.12	-1.10%	42	244,367	3.8%	289.6	11.4%	11.2x	0.7x	ISLAMIBANK	54,740	1.7%	10.5	11.7x	0.7x
Food & Allied	13,143	13,358	-214.44	-1.61%	21	240,488	3.7%	294.9	11.6%	13.9x	3.8x	LHB	50,752	1.6%	7.3	14.1x	2.5x
IT	1,640	1,640	-0.05	-0.00%	11	21,634	0.3%	45.4	1.8%	18.2x	1.4x	UNILEVERCL	41,000	1.3%	0.1	70.5x	15.9x
Textile	978	988	-9.42	-0.95%	58	101,868	1.6%	197.4	7.7%	NM	0.7x	ICB	39,720	1.3%	9.9	NM	0.9x
Paper & Printing	3,820	3,944	-124.34	-3.15%	6	17,257	0.3%	63.4	2.5%	NM	0.8x	BXPBARMA	37,652	1.2%	20.9	5.9x	0.8x
Tannery	1,834	1,887	-52.83	-2.80%	6	20,433	0.3%	30.7	1.2%	62.8x	1.5x	DUTCHBANGL	37,025	1.2%	0.9	8.5x	0.7x
Jute	9,475	9,609	-134.04	-1.39%	3	2,086	0.0%	4.7	0.2%	NM	NM	EBL	35,746	1.1%	17.3	5.3x	0.7x
Ceramics	354	362	-8.02	-2.21%	5	15,894	0.2%	93.7	3.7%	NM	1.0x	PUBALIBANK	31,755	1.0%	1.9	4.0x	0.6x
Miscellaneous	4,137	4,139	-1.51	-0.04%	15	224,664	3.5%	65.4	2.6%	88.5x	1.8x	OLYMPIC	28,751	0.9%	1.6	15.5x	2.4x
Corporate Bond**	15,003	14,984	+19.40	+0.13%	16	32,860	0.5%	1.0	0.0%	NM	NM	POWERGRID	28,145	0.9%	1.5	NM	0.2x
Treasury Bond**	2,017	2,026	-9.85	-0.49%	235	3,280,752	50.8%	0.3	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
UNIONBANK	3.3	+10.0%	7.1	8.9x	0.2x	SQURPHARMA	108,958	7.7%	7.6x	1.3x	BRACBANK	45.9	-1.9%	110.3	6.7x	1.1x
ICB	45.8	+9.8%	9.9	NM	0.9x	ISLAMIBANK	74,730	5.3%	11.7x	0.7x	SQURPHARMA	200.3	-1.6%	106.8	7.6x	1.3x
GIB	3.4	+9.7%	12.8	6.5x	NM	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	43.5	-2.7%	83.2	9.3x	2.6x
NBL	3.8	+8.6%	7.1	NM	8.4x	BATBC	50,233	3.6%	8.5x	2.7x	BPPL	15.8	-2.5%	77.9	68.7x	0.6x
FIRSTSBANK	4.1	+7.9%	11.5	2.2x	0.2x	WALTONHIL	46,773	3.3%	9.2x	1.0x	IFIC	5.9	+1.7%	75.1	4.7x	0.3x
SIBL	8.9	+5.95%	14.2	7.8x	0.4x	BRACBANK	46,489	3.3%	6.7x	1.1x	SPCERAMICS	21.5	-5.3%	64.5	NM	0.7x
RENWICKJA	656.0	+5.3%	0.0	NM	NM	GP	44,708	3.2%	12.6x	5.2x	SALAMCRST	21.6	-5.3%	63.8	NM	1.2x
NAHEEACP	21.7	+4.8%	48.1	80.4x	1.1x	RENATA	32,968	2.3%	19.5x	1.6x	MIDLANDBNK	27.1	+1.5%	50.1	21.3x	1.8x
HEIDELBCEM	206.2	+3.9%	5.8	44.0x	2.7x	BXPBARMA	23,409	1.7%	5.9x	0.8x	NAHEEACP	21.7	+4.8%	48.1	80.4x	1.1x
ICBIBANK	2.9	+3.6%	0.9	NM	NM	PUBALIBANK	22,905	1.6%	4.0x	0.6x	BATBC	260.3	-2.7%	46.6	8.5x	2.7x
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)
NCCBANK	10.3	-9.6%	2.0	4.7x	0.5x	LHB	20,953	1.5%	14.1x	2.5x	FINEFOODS	234.3	205.0	11.0	258	54.31
SONARGAON	38.6	-9.2%	34.8	NM	2x	OLYMPIC	20,496	1.5%	15.5x	2.4x	NCCBANK	10.3	10.3	1.0	3,000	30.90
SEMLLECMF	10.6	-7.0%	23.2	NM	1.2x	ALARABANK	18,282	1.3%	12.9x	0.9x	BATBC	290.0	290.0	1.0	50	14.50
BANKASIA	15.2	-6.6%	19.1	5.8x	0.6x	BEACONPHAR	17,838	1.3%	28.9x	3.9x	IFIC	6.0	6.0	1.0	1,520	9.12
STANDARINS	35.6	-6.6%	17.0	15.3x	1.6x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	ITC	35.6	35.6	1.0	200	7.12
ALARABANK	19.7	-6.2%	2.0	12.9x	0.9x	ROBI	14,876	1.1%	16.7x	1.7x	GP	271.2	271.2	1.0	25	6.78
ZEALBANGLA	82.2	-5.6%	0.1	NM	NM	UTTARABANK	13,699	1.0%	7.1x	0.6x	AL-HAJTEX	123.6	118.0	6.0	48	5.72
1JANATAMF	3.4	-5.6%	1.4	NM	0.4x	NBL	13,055	0.9%	NM	8.4x	KDSALTD	45.1	41.7	2.0	119	5.29
SPCERAMICS	21.5	-5.3%	64.5	NM	0.7x	BSRMLTD	12,852	0.9%	4.1x	0.4x	INTRACO	23.8	23.8	1.0	210	5.00
KPPL	18.0	-5.3%	17.1	NM	NM	* 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
FINEFOODS	234.3	205.0	54.3	258	11
NCCBANK	10.3	10.3	30.9	3,000	1
BATBC	290.0	290.0	14.5	50	1
IFIC	6.0	6.0	9.1	1,520	1
ITC	35.6	35.6	7.1	200	1
GP	271.2	271.2	6.8	25	1
AL-HAJTEX	123.6	118.0	5.7	48	6
KDSALTD	45.1	41.7	5.3	119	2
INTRACO	23.8	23.8	5.0	210	1
UNIQUEHRL	32.7	32.7	3.5	106	1
SHEPHERD	16.5	16.5	3.3	200	1
PRIMEINSUR	27.3	27.3	3.1	112	1
ORIONINFU	368.5	320.0	2.9	8	2
MIDLANDBNK	25.3	25.3	2.4	94	2
LOVELLO	77.0	77.0	2.3	30	1
UTTARABANK	22.2	22.2	2.2	100	1
RDFOOD	22.5	22.5	2.2	97	1
HAMI	113.1	113.0	1.9	16	2
DUTCHBANGL	42.0	42.0	1.5	36	1
GLOBALINS	29.0	29.0	1.5	50	1
PREMIERCEM	46.7	46.7	1.4	30	2
ISNLTD	43.9	43.9	1.3	30	2
Total			176.7		54

Important DSE News

ATCSLGF

Bangladesh General Insurance Company PLC. as Trustee of the Fund (Under Liquidation) would like to inform all concerned that, as per Securities and Exchange Commission (Mutual Fund) Rules-2001, the Fund is in the process of "Winding Up". The Trustee of the Fund requests all concerned to submit their claim for dividend, refund or any other claim from the Fund. Claim, if any, should be submitted with full details by June 23, 2025 to the Trustee, Bangladesh General Insurance Company PLC., Trustee Department, 1st floor, 42 Dilkusha C/A, Dhaka-1000. Any claim received after the above mentioned date will not be accepted.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
FAREASTFIN		0.0%	0.0%	Record Date	1-Jun-25
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

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