

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 10.87 points and closed at 5,185.83. The blue-chip index DS30 (-0.30%), the Shariah-based index DSES (+0.10%), and the large-cap index CDSET (-0.25%) closed at 1,924.89, 1,167.11, and 1,046.28 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.84%, followed by Food & Allied (+0.09%), Engineering (+0.02%), Pharmaceutical (-0.20%), Bank (-0.60%), Telecommunication (-0.65%), and NBFI (-0.77%), respectively. Block trades contributed 4.0% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+1.4%) was the most traded share with a turnover of BDT 240 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,185.83	5,196.70	-10.87	-0.21%	-0.6%
DS30	1,924.89	1,930.71	-5.82	-0.30%	-0.8%
DSES	1,167.11	1,165.97	+1.14	+0.10%	-0.2%
CDSET	1,046.28	1,048.92	-2.64	-0.25%	-1.9%

	Advanced	Declined	Unchanged	Total
All Category	149	194	54	397
A Category (Equity)	100	94	25	219
B Category (Equity)	24	53	6	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	25	47	23	95
Mutual Funds	29	5	2	36
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,717,792	6,734,215	-0.2%
	Mn USD	55,064	55,198	
Turnover	Mn BDT	4,836	4,699	+2.9%
	Mn USD	40	39	
Volume	Mn Shares	221	167	+32.9%
No. of Trade		162,881	152,149	+7.1%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 08, 2025

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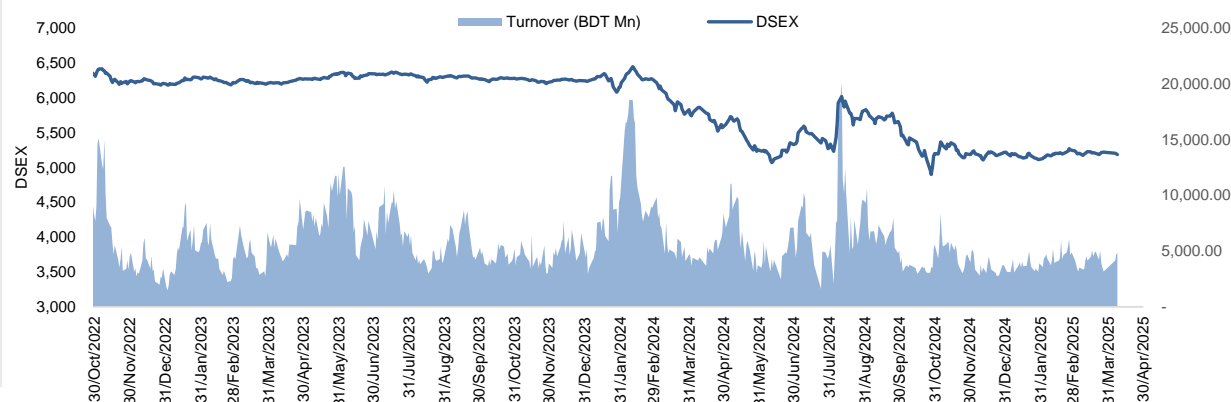


Figure: Sectorial Turnover (BDT Mn)

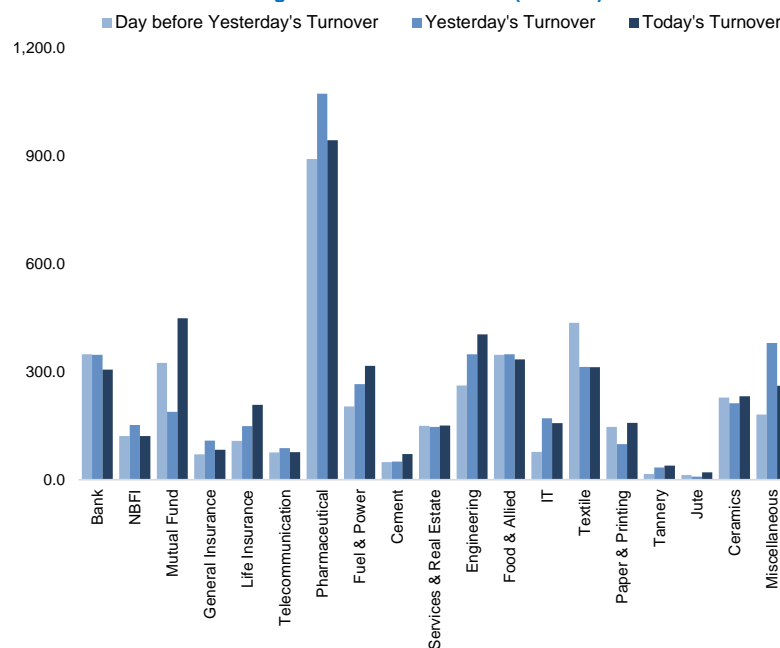
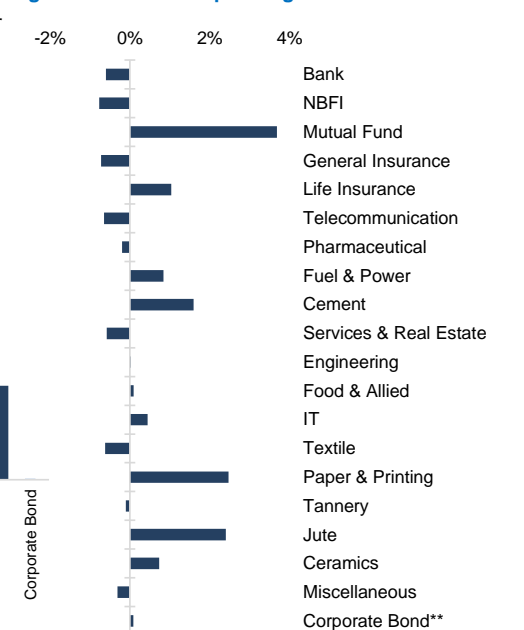


Figure: Sectorial Mcap Change



Market PE 14.6x

Market PB 1.2x

* 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	1,408	1,416	-8.47	-0.60%	36	666,071	9.9%	305.6	6.6%	8.4x	0.7x	GP	432,771	12.3%	23.9	11.9x	6.7x
NBFI	1,073	1,081	-8.30	-0.77%	23	102,228	1.5%	121.4	2.6%	NM	NM	SQURPHARMA	191,651	5.4%	89.5	8.6x	1.5x
Mutual Fund	671	647	+23.85	+3.69%	37	30,837	0.5%	448.1	9.7%	NM	0.6x	BATBC	173,772	4.9%	15.6	9.9x	3.0x
General Insurance	2,566	2,585	-18.62	-0.72%	43	73,260	1.1%	83.3	1.8%	13.0x	1.1x	WALTONHIL	139,317	4.0%	4.5	10.5x	1.3x
Life Insurance	1,813	1,795	+18.56	+1.03%	15	48,232	0.7%	208.0	4.5%	NM	NM	ROBI	136,186	3.9%	47.5	19.4x	2.0x
Telecommunication	5,055	5,088	-32.92	-0.65%	3	592,730	8.8%	76.2	1.6%	13.3x	4.0x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,968	2,973	-5.89	-0.20%	34	562,586	8.4%	942.5	20.3%	13.4x	1.6x	BRACBANK	86,716	2.5%	38.5	7.8x	1.2x
Fuel & Power	1,092	1,083	+9.13	+0.84%	23	289,373	4.3%	316.3	6.8%	16.2x	0.6x	BERGERPBL	82,831	2.4%	0.8	24.1x	5.7x
Cement	1,781	1,753	+28.01	+1.60%	7	84,878	1.3%	71.2	1.5%	16.8x	1.9x	MARICO	76,284	2.2%	2.5	13.6x	10.0x
Services & Real Estate	1,013	1,019	-5.93	-0.58%	9	55,713	0.8%	150.6	3.2%	19.9x	0.4x	ISLAMIBANK	69,713	2.0%	10.0	14.9x	1.0x
Engineering	2,456	2,455	+0.49	+0.02%	42	277,031	4.1%	403.7	8.7%	12.6x	0.9x	RENATA	56,947	1.6%	14.8	19.3x	1.7x
Food & Allied	15,581	15,566	+14.19	+0.09%	21	285,083	4.2%	334.0	7.2%	15.6x	4.2x	LHB	52,378	1.5%	36.1	13.7x	2.8x
IT	1,981	1,972	+8.80	+0.45%	11	26,131	0.4%	157.0	3.4%	20.3x	1.7x	BXPBARMA	48,715	1.4%	240.4	7.6x	1.0x
Textile	1,072	1,079	-6.65	-0.62%	58	111,635	1.7%	312.7	6.7%	89.0x	0.7x	UNILEVERCL	46,478	1.3%	0.6	69.7x	19.0x
Paper & Printing	4,660	4,548	+112.27	+2.47%	6	21,055	0.3%	157.8	3.4%	NM	1.0x	ICB	43,883	1.2%	7.3	34.6x	1.0x
Tannery	1,923	1,925	-1.90	-0.10%	6	21,423	0.3%	38.9	0.8%	NM	1.6x	DUTCHBANGL	43,765	1.2%	0.7	7.0x	0.9x
Jute	12,097	11,813	+284.41	+2.41%	3	2,663	0.0%	20.8	0.4%	NM	NM	EBL	36,806	1.0%	24.7	5.6x	0.9x
Ceramics	433	430	+3.17	+0.74%	5	19,443	0.3%	231.5	5.0%	NM	1.2x	POWERGRID	32,988	0.9%	3.6	NM	0.3x
Miscellaneous	4,241	4,254	-13.23	-0.31%	15	230,313	3.4%	261.0	5.6%	94.8x	1.9x	PUBALIBANK	32,854	0.9%	3.6	3.4x	0.6x
Corporate Bond**	15,198	15,185	+13.70	+0.09%	16	33,287	0.5%	0.7	0.0%	NM	NM	CITYBANK	30,965	0.9%	12.6	4.3x	0.8x
Treasury Bond**	1,796	1,782	+13.87	+0.78%	235	3,183,360	47.4%	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
BDLAMPS	130.6	+9.9%	25.8	NM	2.8x	SQURPHARMA	108,958	7.7%	8.6x	1.5x	BXPHARMA	109.2	+1.4%	240.4	7.6x	1.0x
DESCO	27.0	+8.9%	24.8	NM	0.7x	ISLAMIBANK	74,730	5.3%	14.9x	1.0x	SPCERAMICS	27.5	-0.4%	198.6	NM	0.9x
HEIDELBCEM	231.4	+8.7%	10.4	35.5x	3.2x	BEXIMCO	69,463	4.9%	NM	1.3x	BSC	93.4	-0.7%	178.9	4.9x	1.0x
FBFIF	3.8	+8.6%	9.4	NM	0.4x	BATBC	50,233	3.6%	9.9x	3.0x	ABB1STMF	5.1	+8.5%	131.0	NM	0.6x
ABB1STMF	5.1	+8.5%	131.0	NM	0.6x	WALTONHIL	46,773	3.3%	10.5x	1.3x	NAVANAPHAR	60.4	+6.7%	113.5	15.4x	1.4x
IFIC1STMF	4.0	+8.11%	32.3	NM	0.4x	BRACBANK	46,489	3.3%	7.8x	1.2x	BEACHHATCH	98.8	-3.7%	105.9	29.0x	6.5x
LRGLOBMF1	4.0	+8.1%	8.1	NM	0x	GP	44,708	3.2%	11.9x	6.7x	EHL	83.1	+1.6%	93.3	12.0x	1.0x
AMBEEPHA	822.1	+7.5%	20.6	NM	65.3x	RENATA	32,968	2.3%	19.3x	1.7x	SQURPHARMA	216.2	-0.7%	89.5	8.6x	1.5x
SONALIPAPR	159.2	+7.3%	48.0	28.1x	1.0x	BXPHARMA	23,409	1.7%	7.6x	1.0x	ACI	200.7	-0.6%	79.1	NM	2.9x
MITHUNKNIT	16.8	+7.0%	3.4	NM	5.3x	PUBALIBANK	22,905	1.6%	3.4x	0.6x	INTRACO	24.4	+0.8%	71.0	24.9x	1.9x
						CITYBANK	21,020	1.5%	4.3x	0.8x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	13.7x	2.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PADMALIFE	23.2	-7.9%	7.8	NM	NM	OLYMPIC	20,496	1.5%	16.2x	2.6x	BANKASIA	18.0	18.0	1.0	4,664	83.95
CENTRALPHL	11.1	-6.7%	22.8	NM	2x	ALARABANK	18,282	1.3%	14.9x	1.1x	MERCANBANK	10.2	10.2	5.0	4,908	50.06
FUWANGFOOD	15.4	-6.7%	53.2	NM	7.4x	BEACONPHAR	17,838	1.3%	50.1x	4.4x	AL-HAJTEX	143.0	142.0	5.0	73	10.40
MIDASFIN	9.9	-6.6%	6.5	NM	2.6x	PRIMEBANK	16,142	1.1%	3.8x	0.7x	KBPPWBIL	162.0	135.2	10.0	72	10.31
PREMIERLEA	3.3	-5.7%	0.1	NM	NM	ROBI	14,876	1.1%	19.4x	2.0x	CVOPRL	142.3	142.3	2.0	65	9.20
PIONEERINS	41.7	-5.4%	6.1	8.7x	0.9x	UTTARABANK	13,699	1.0%	8.0x	0.8x	PREMIERCEM	54.0	54.0	4.0	77	4.18
PENINSULA	11.1	-5.1%	2.2	NM	0.4x	NBL	13,055	0.9%	NM	2.2x	HAMI	124.0	124.0	1.0	25	3.10
HRTEX	32.8	-4.9%	16.2	NM	1.8x	BSRMLTD	12,852	0.9%	5.1x	0.5x	DHAKAINS	40.0	40.0	1.0	72	2.87
ICBAMCL2ND	6.4	-4.5%	1.9	NM	1.0x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
NEWLINE	8.6	-4.4%	4.7	NM	0.3x	** 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
BANKASIA	18.0	18.0	84.0	4,664	1
MERCANBANK	10.2	10.2	50.1	4,908	5
AL-HAJTEX	143.0	142.0	10.4	73	5
KBPPWBIL	162.0	135.2	10.3	72	10
CVOPRL	142.3	142.3	9.2	65	2
PREMIERCEM	54.0	54.0	4.2	77	4
HAMI	124.0	124.0	3.1	25	1
DHAKAINS	40.0	40.0	2.9	72	1
CLICL	52.1	52.1	2.6	50	1
RELIANCE1	21.0	21.0	2.0	97	3
SINOBANGLA	50.4	50.4	2.0	40	1
EBL1STMF	6.1	6.0	1.8	300	2
BPML	41.7	41.7	1.5	37	1
SUNLIFEINS	77.9	68.5	1.3	18	2
ORIONINFU	401.4	401.4	1.3	3	1
NTLTUBES	83.0	83.0	1.0	12	1
ACI	210.0	210.0	0.9	4	1
CAPMBDBLMF	8.2	8.2	0.8	100	1
BBSCABLES	16.0	16.0	0.8	51	1
SONARGAON	38.9	38.9	0.8	21	1
IFIC	7.0	7.0	0.7	100	1
CNATEX	3.6	3.6	0.5	150	1
Total			194.7		52

Important DSE News
RECKITT BEN

The Board of Directors has recommended 3330% Final Cash Dividend (Tk. 333 per share of Face Value of Tk. 10.00 each) for the year ended December 31, 2024. Date of AGM: 28.05.2025, Time: 11:00 AM. Venue: Digital Platform. Record date: 29.04.2025. The Company has also reported EPS of Tk. 159.17, NAV per share of Tk. 350.64 and NOCFPS of Tk. 22.55 for the year ended December 31, 2024 as against Tk. 173.65, Tk. 252.69 and Tk. 253.56 respectively for the year ended December 31, 2023.

LOVELLO

Mr. Md. Ekramul Haque, one of the Sponsor Directors of the Company, has reported that he has completed his transfer of 10,00,000 shares of the Company to his brother Mr. Md. Zahedul Haque (General Shareholder of the company), by way of gift outside the trading system of the Exchange as per declaration disseminated by CSE on 07.04.2025.

SONALIPAPR

The company has informed that considering the increased demand and to mitigate it by increasing present production & sales of the Company, the Board has considered to purchase a running paper mill and asked management to seek such a mill and to get finance from available source subject to the approval of the Shareholders of the company through EGM. The date, time and venue for the EGM will be disclosed later.

CLICL

The company has informed that according to the Board of Directors decision Additional Managing Director Mr. Mohammed Amdad Ullah will take charge as Chief Executive Officer (Acting) until new CEO appointed.

SIBL

The company has informed that Mr. Shafiuzzaman assumed the Office of the Managing Director of Social Islami Bank PLC with effect from March 27, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
LHB		0.0%	19.0%	Record Date	9-Apr-25
UTTARABANK		17.5%	17.5%	Record Date	20-Apr-25
PARAMOUNT		0.0%	10.0%	Record Date	22-Apr-25
EBL		17.5%	17.5%	Record Date	23-Apr-25
RECKITT BEN		0.0%	3330.0%	Record Date	29-Apr-25

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