

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.68%) lost 35.55 points and closed at 5,169.68. The blue-chip index DS30 (-0.83%), the Shariah-based index DSES (-0.57%), and the large-cap index CDSET (-0.52%) closed at 1,911.97, 1,166.21, and 1,044.61 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.66% followed by Fuel & Power (-1.05%), NBF (I) (-0.87%), Pharmaceutical (-0.46%), Telecommunication (-0.31%), Engineering (+0.26%), and Food & Allied (+0.28%), respectively. Block trades contributed 8.1% of the overall market turnover. Bangladesh Shipping Corporation (+3.0%) was the most traded share with a turnover of BDT 285 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,169.68	5,205.23	-35.55	-0.68%	-0.9%
DS30	1,911.97	1,927.90	-15.93	-0.83%	-1.4%
DSES	1,166.21	1,172.96	-6.74	-0.57%	-0.2%
CDSET	1,044.61	1,050.11	-5.50	-0.52%	-2.0%

	Advanced	Declined	Unchanged	Total
All Category	79	270	48	397
A Category (Equity)	58	138	23	219
B Category (Equity)	12	63	8	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	9	69	17	95
Mutual Funds	3	25	8	36
Corporate Bonds	0	0	1	1
Treasury Bonds	1	1	0	2

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,693,264	6,716,438	-0.3%
	Mn USD	54,863	55,053	
Turnover	Mn BDT	4,143	5,402	-23.3%
	Mn USD	34	44	
Volume	Mn Shares	146	211	-30.7%
	No. of Trade	142,852	159,988	-10.7%

\* Average Interbank Exchange Rate is BDT 122.00 as of Apr 13, 2025

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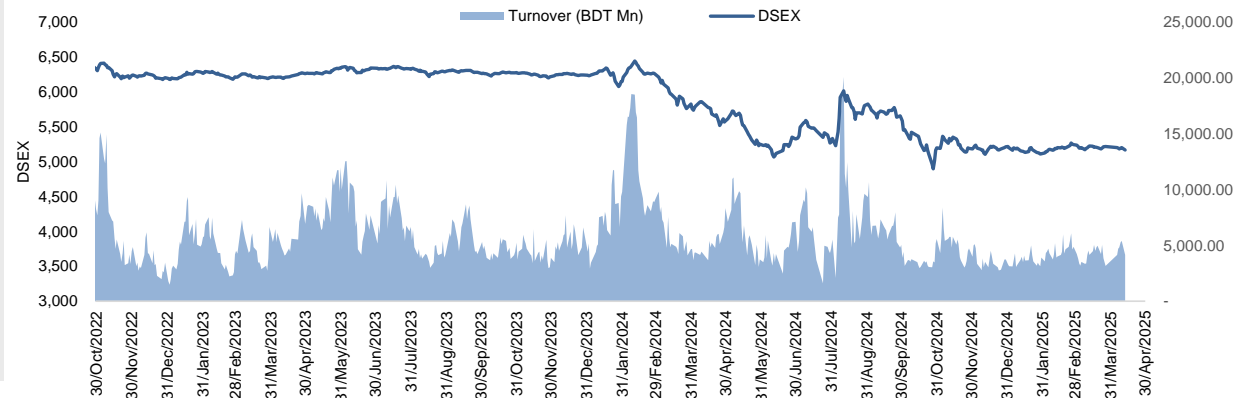


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

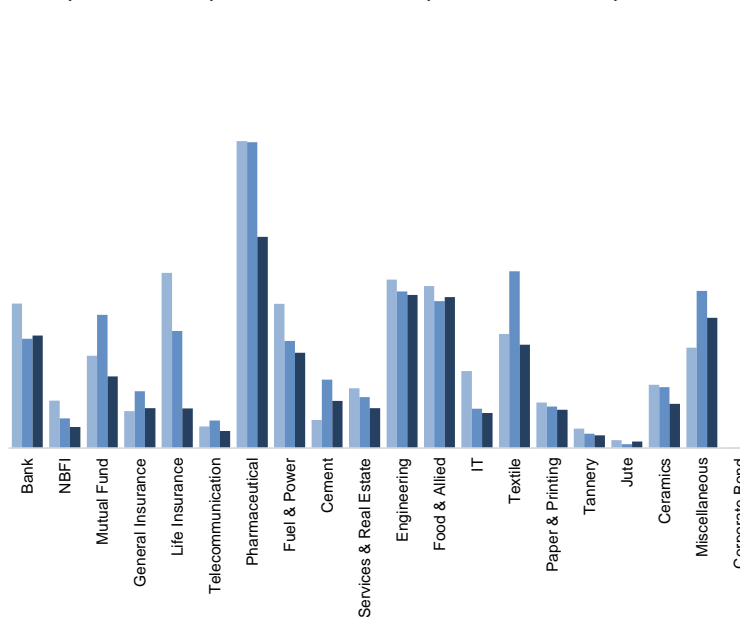
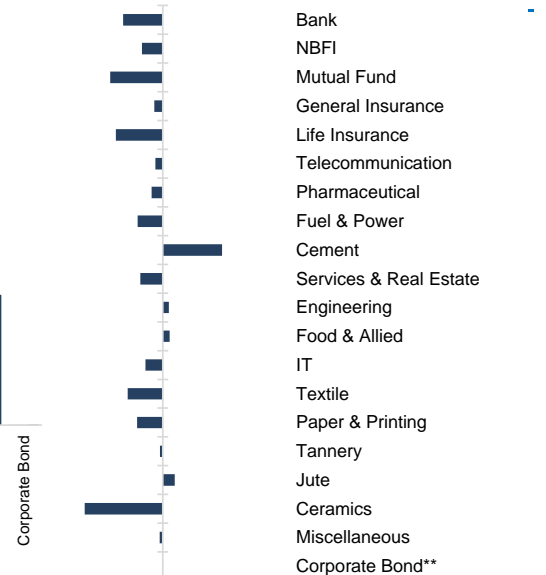


Figure: Sectorial Mcap Change

-5% 0% 5%



Market PE 14.5x

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	1,380	1,403	-23.31	-1.66%	36	652,792	9.8%	312.1	8.2%	8.3x	0.7x	GP	432,231	12.3%	19.7	11.9x	6.7x
NBFI	1,064	1,073	-9.32	-0.87%	23	101,397	1.5%	58.4	1.5%	NM	NM	SQURPHARMA	193,778	5.5%	29.2	8.7x	1.5x
Mutual Fund	652	667	-14.63	-2.20%	37	29,963	0.4%	198.7	5.2%	NM	0.6x	BATBC	174,312	5.0%	34.2	10.0x	3.0x
General Insurance	2,552	2,561	-9.04	-0.35%	43	72,846	1.1%	111.0	2.9%	12.9x	1.1x	WALTONHIL	141,195	4.0%	3.0	10.7x	1.3x
Life Insurance	1,789	1,825	-35.83	-1.96%	15	47,576	0.7%	109.9	2.9%	NM	NM	ROBI	136,186	3.9%	21.2	19.4x	2.0x
Telecommunication	5,050	5,065	-15.49	-0.31%	3	592,115	8.8%	47.7	1.3%	13.3x	4.0x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,960	2,974	-13.81	-0.46%	34	561,221	8.4%	586.3	15.4%	13.4x	1.6x	BRACBANK	87,601	2.5%	15.1	7.9x	1.2x
Fuel & Power	1,099	1,110	-11.65	-1.05%	23	291,017	4.3%	264.8	7.0%	16.3x	0.6x	BERGERPBL	82,863	2.4%	0.2	24.1x	5.7x
Cement	1,951	1,904	+47.10	+2.47%	7	92,987	1.4%	130.8	3.4%	18.4x	2.1x	MARICO	76,665	2.2%	2.6	13.7x	10.1x
Services & Real Estate	1,018	1,028	-9.65	-0.94%	9	56,005	0.8%	111.0	2.9%	20.0x	0.4x	UPGDCL	69,042	2.0%	8.2	6.5x	1.8x
Engineering	2,490	2,484	+6.34	+0.26%	42	280,915	4.2%	424.9	11.2%	12.7x	0.9x	RENATA	57,268	1.6%	5.7	19.4x	1.7x
Food & Allied	15,743	15,699	+44.04	+0.28%	21	288,061	4.3%	419.3	11.0%	15.7x	4.3x	LHB	56,327	1.6%	45.9	14.7x	3.0x
IT	1,953	1,968	-14.27	-0.73%	11	25,766	0.4%	97.2	2.6%	20.0x	1.6x	UNILEVERCL	46,989	1.3%	0.3	70.4x	19.2x
Textile	1,066	1,081	-15.81	-1.46%	58	110,973	1.7%	287.1	7.5%	88.4x	0.7x	BXPHARMA	45,459	1.3%	100.7	7.1x	0.9x
Paper & Printing	4,440	4,488	-48.03	-1.07%	6	20,059	0.3%	106.1	2.8%	NM	0.9x	ICB	44,317	1.3%	4.1	35.0x	1.0x
Tannery	1,927	1,929	-2.23	-0.12%	6	21,471	0.3%	35.5	0.9%	NM	1.6x	DUTCHBANGL	41,832	1.2%	1.9	6.7x	0.9x
Jute	12,197	12,136	+60.74	+0.50%	3	2,685	0.0%	18.2	0.5%	NM	NM	EBL	36,670	1.0%	18.8	5.6x	0.9x
Ceramics	420	434	-14.16	-3.26%	5	18,846	0.3%	122.7	3.2%	NM	1.2x	POWERGRID	32,806	0.9%	2.2	NM	0.3x
Miscellaneous	4,242	4,247	-5.64	-0.13%	15	230,345	3.4%	361.8	9.5%	94.8x	1.9x	OLYMPIC	32,290	0.9%	86.1	17.5x	2.8x
Corporate Bond**	15,314	15,314	-	-	16	33,541	0.5%	1.1	0.0%	NM	NM	PUBALIBANK	32,160	0.9%	3.1	3.4x	0.6x
Treasury Bond**	1,843	1,816	+26.84	+1.48%	236	3,161,575	47.2%	1.8	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
ECABLES	131.6	+9.9%	22.7	NM	0.4x	SQURPHARMA	108,958	7.7%	8.7x	1.5x	BSC	101.1	+3.0%	285.0	5.3x	1.1x
WATACHEM	134.3	+9.9%	35.8	NM	2.2x	ISLAMIBANK	74,730	5.3%	14.3x	0.9x	BXPHARMA	101.9	-3.2%	100.7	7.1x	0.9x
HEIDELBCEM	297.0	+8.6%	38.7	45.6x	4.1x	BEXIMCO	69,463	4.9%	NM	1.3x	UTTARABANK	25.4	+0.4%	100.5	7.6x	0.8x
AMBEEPHA	914.1	+7.4%	29.4	NM	72.7x	BATBC	50,233	3.6%	10.0x	3.0x	EASTRN LUB	2,461.5	+5.0%	93.4	70.2x	11.8x
MONNOAGML	342.1	+6.9%	34.5	NM	2.5x	WALTONHIL	46,773	3.3%	10.7x	1.3x	SPCERAMICS	23.7	-8.1%	92.3	NM	0.8x
ARAMIT	178.1	+5.57%	14.0	47.6x	1.4x	BRACBANK	46,489	3.3%	7.9x	1.2x	BEACHHATCH	96.6	+1.0%	91.8	28.3x	6.4x
MALEKSPIN	26.3	+5.2%	86.4	3.4x	0x	GP	44,708	3.2%	11.9x	6.7x	MALEKSPIN	26.3	+5.2%	86.4	3.4x	0.5x
PREMIERCEM	58.0	+5.1%	26.7	12.1x	0.9x	RENATA	32,968	2.3%	19.4x	1.7x	OLYMPIC	161.5	+4.5%	86.1	17.5x	2.8x
EASTRN LUB	2,461.5	+5.0%	93.4	70.2x	11.8x	BXPHARMA	23,409	1.7%	7.1x	0.9x	ORIONINFU	388.4	-1.9%	78.6	NM	25.3x
ANWARGALV	72.0	+4.8%	22.4	NM	12.6x	PUBALIBANK	22,905	1.6%	3.4x	0.6x	ABB1STMF	5.3	-1.9%	65.1	NM	0.6x
						CITYBANK	21,020	1.5%	4.3x	0.8x						
						LHB	20,953	1.5%	14.7x	3.0x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	OLYMPIC	20,496	1.5%	17.5x	2.8x	SUNLIFEINS	73.5	71.3	7.0	1,379	98.99
PRIMEBANK	21.7	-11.8%	4.5	3.4x	0.6x	ALARABANK	18,282	1.3%	15.0x	1.1x	RELANCE1	20.4	20.2	37.0	3,122	63.17
AL-HAJTEX	128.6	-9.9%	28.0	NM	15x	BEACONPHAR	17,838	1.3%	49.2x	4.3x	BEACHHATCH	96.1	90.0	17.0	524	48.54
SPCERAMICS	23.7	-8.1%	92.3	NM	0.8x	PRIMEBANK	16,142	1.1%	3.4x	0.6x	BANKASIA	18.0	18.0	1.0	2,330	41.94
PHOENIXFIN	3.7	-7.5%	0.6	NM	NM	ROBI	14,876	1.1%	19.4x	2.0x	SEMLLECMF	8.5	8.5	6.0	2,500	21.25
SALAMCRST	23.9	-5.9%	25.1	NM	1.3x	UTTARABANK	13,699	1.0%	7.6x	0.8x	NRBBANK	13.2	11.9	3.0	1,034	12.70
FAREASTFIN	3.2	-5.9%	0.2	NM	NM	NBL	13,055	0.9%	NM	2.2x	MARICO	2,420.0	2,420.0	1.0	4	9.08
PRIME1ICBA	4.9	-5.8%	2.7	NM	0.8x	BSRMLTD	12,852	0.9%	5.1x	0.5x	EASTRN LUB	2,371.0	2,370.0	3.0	3	7.93
KBPPWBIL	134.5	-5.5%	32.0	NM	11.3x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
PHPMF1	3.5	-5.4%	4.0	NM	0.4x	** The base of the Bond Index starts at 100, starting from Jan 13, 2022										
POPULAR1MF	3.6	-5.3%	3.6	NM	0.4x	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
SUNLIFEINS	73.5	71.3	99.0	1,379	7
RELIANCE1	20.4	20.2	63.2	3,122	37
BEACHHATCH	96.1	90.0	48.5	524	17
BANKASIA	18.0	18.0	41.9	2,330	1
SEMILLECMF	8.5	8.5	21.3	2,500	6
NRBBANK	13.2	11.9	12.7	1,034	3
MARICO	2,420.0	2,420.0	9.1	4	1
EASTRNLUB	2,371.0	2,370.0	7.9	3	3
CLICL	51.0	51.0	5.1	100	1
DACCADYE	17.9	17.9	4.2	235	1
PRIMEBANK	24.5	24.5	2.5	100	1
BEXIMCO	99.7	99.5	2.0	20	4
AL-HAJTEX	142.8	138.0	2.0	14	2
ORIONINFU	382.5	382.5	1.9	5	1
PREMIERCEM	56.5	53.0	1.9	35	3
BSC	98.1	98.1	1.6	17	1
SIBL	10.8	10.8	1.5	140	2
CAPMBDBLMF	8.4	8.3	1.3	160	2
HAKKANIPUL	64.7	53.1	1.0	18	2
ABB1STMF	5.1	5.1	1.0	200	1
BATASHOE	845.0	845.0	1.0	1	1
LOVELLO	88.9	88.9	0.9	10	1
<b>Total</b>			<b>336.8</b>		<b>106</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
RECKITBEN		0.0%	3330.0%	Record Date	29-Apr-25
EASTLAND		0.0%	10.0%	Record Date	2-Jun-25

#### Important DSE News

##### EASTLAND

The Board of Directors has recommended 10% Cash Dividend for the General Public Shareholders excluding Sponsors and/or Directors and the Board of Directors for the year ended December 31, 2024. Quantity of shares held by the Sponsors and or Directors and the Board of Directors who will not be entitled to such recommended dividend: 3,44,85,719 nos. shares. Amount payable to the general public shareholders as dividend: Tk. 4,93,94,862/-. Date of AGM: 30-June-2025, Time: 3:00 PM, Venue: Virtual Platform. Record Date: 02-June-2025. The Company has also reported EPS of Tk. 1.07, NAV per share of Tk. 21.12 and NOCFPS of Tk. 0.76 for the year ended on 31-Dec-2024 as against Tk. 1.14, Tk. 21.67 and Tk. 0.83 respectively for the year ended on 31-Dec-2023.

##### TAKAFULINS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Takaful Islami Insurance PLC' instead of 'Takaful Islami Insurance Limited' with effect from today i.e., April 13, 2025. Other things (except name) will remain unchanged.

##### TITASGAS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Titas Gas Transmission and Distribution PLC' instead of 'Titas Gas Transmission and Distribution Company Ltd.' with effect from today i.e., April 13, 2025. Other information (except name) will remain unchanged.

##### ACI

Ms. Shusmita Anis, a Director of the Company, has expressed her intention to buy 775,000 shares of the Company at prevailing market price (in the Block Market) through Dhaka Stock Exchange PLC. within April 30, 2025.

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