

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.73%) lost 37.66 points and closed at 5,132.02. The blue-chip index DS30 (-0.97%), the Shariah-based index DSES (-0.91%), and the large-cap index CDSET (-0.34%) closed at 1,893.45, 1,155.65, and 1,041.08 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 0.73% followed by Pharmaceutical (-0.70%), Fuel & Power (-0.41%), Bank (-0.32%), Food & Allied (-0.21%), Telecommunication (+0.00%), and Engineering (+0.21%), respectively. Block trades contributed 11.0% of the overall market turnover. Bangladesh Shipping Corporation (-2.1%) was the most traded share with a turnover of BDT 210 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,132.02	5,169.68	-37.66	-0.73%	-1.6%
DS30	1,893.45	1,911.97	-18.52	-0.97%	-2.4%
DSES	1,155.65	1,166.21	-10.57	-0.91%	-1.1%
CDSET	1,041.08	1,044.61	-3.53	-0.34%	-2.3%

	Advanced	Declined	Unchanged	Total
All Category	98	255	44	397
A Category (Equity)	69	132	19	220
B Category (Equity)	11	67	5	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	18	56	20	94
Mutual Funds	7	24	5	36
Corporate Bonds	1	0	1	2
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,719,693	6,693,264	+0.4%
	Mn USD	55,079	54,863	
Turnover	Mn BDT	4,461	4,143	+7.7%
	Mn USD	37	34	
Volume	Mn Shares	159	146	+9.1%
No. of Trade		151,816	142,852	+6.3%

* Average Interbank Exchange Rate is BDT 122.00 as of Apr 15, 2025

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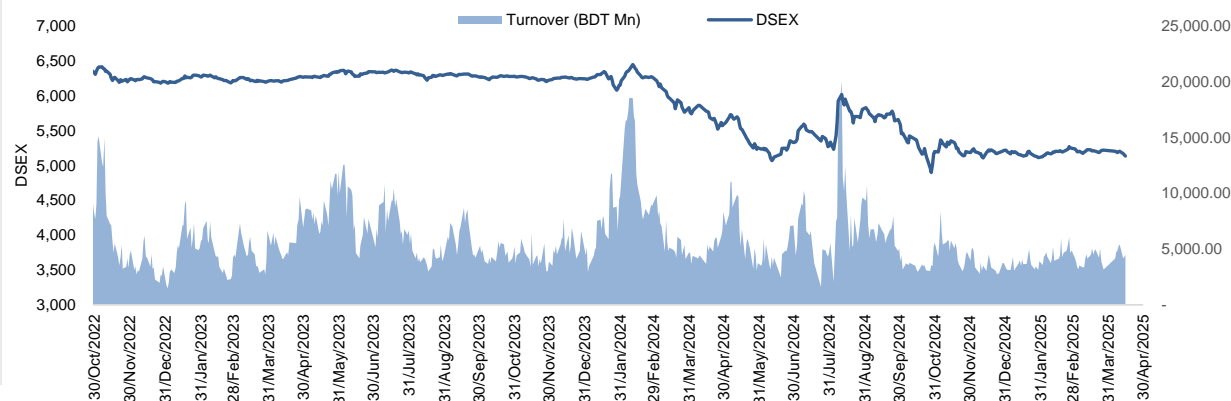


Figure: Sectorial Turnover (BDT Mn)

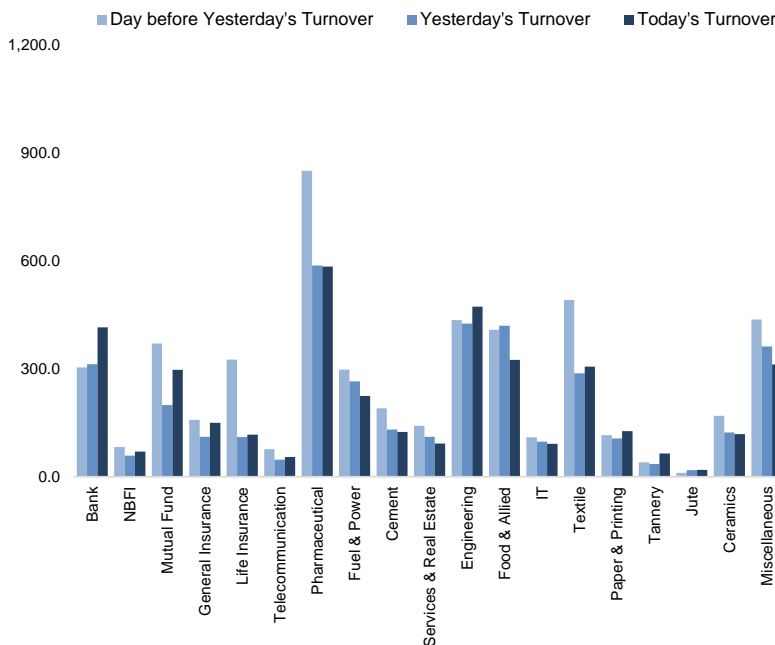
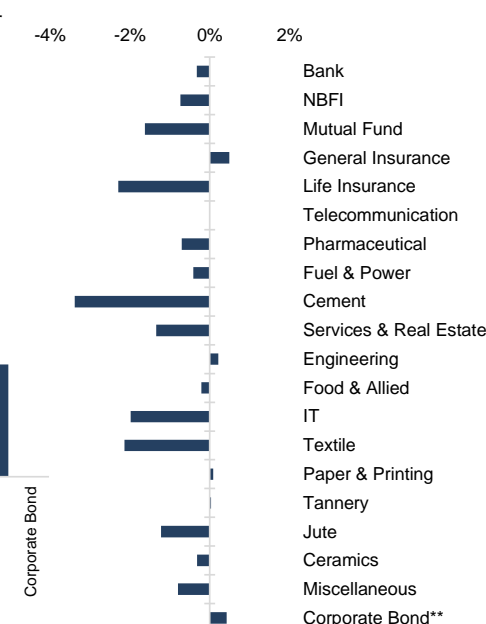


Figure: Sectorial Mcap Change



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	1,375	1,380	-4.45	-0.32%	36	650,686	9.8%	414.8	10.4%	8.2x	0.7x	GP	433,176	12.4%	25.8	11.9x	6.7x
NBFI	1,056	1,064	-7.79	-0.73%	23	100,655	1.5%	70.0	1.8%	NM	NM	SQURPHARMA	192,714	5.5%	39.1	8.6x	1.5x
Mutual Fund	641	652	-10.57	-1.62%	37	29,477	0.4%	296.5	7.5%	NM	0.6x	BATBC	174,690	5.0%	37.8	10.0x	3.0x
General Insurance	2,564	2,552	+12.61	+0.49%	43	73,206	1.1%	149.8	3.8%	13.0x	1.1x	WALTONHIL	143,255	4.1%	13.2	10.8x	1.3x
Life Insurance	1,748	1,789	-40.92	-2.29%	15	46,487	0.7%	117.1	2.9%	NM	NM	ROBI	135,662	3.9%	23.6	19.3x	2.0x
Telecommunication	5,050	5,050	+0.08	+0.00%	3	592,125	8.9%	54.9	1.4%	13.3x	4.0x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Pharmaceutical	2,940	2,960	-20.71	-0.70%	34	557,294	8.4%	583.7	14.7%	13.3x	1.5x	BRACBANK	88,309	2.5%	17.6	8.0x	1.2x
Fuel & Power	1,094	1,099	-4.54	-0.41%	23	289,815	4.3%	224.6	5.7%	16.2x	0.6x	BERGERPBL	82,720	2.4%	0.6	24.1x	5.7x
Cement	1,885	1,951	-66.03	-3.38%	7	89,841	1.3%	124.3	3.1%	17.8x	2.0x	MARICO	76,822	2.2%	7.1	13.7x	10.1x
Services & Real Estate	1,005	1,018	-13.66	-1.34%	9	55,254	0.8%	92.2	2.3%	19.7x	0.4x	UPGDCL	68,288	2.0%	5.4	6.4x	1.8x
Engineering	2,496	2,490	+5.34	+0.21%	42	281,518	4.2%	472.2	11.9%	12.8x	0.9x	RENATA	57,417	1.6%	8.7	19.4x	1.7x
Food & Allied	15,710	15,743	-32.90	-0.21%	21	287,459	4.3%	324.7	8.2%	15.7x	4.3x	LHB	54,004	1.5%	45.8	14.1x	2.9x
IT	1,915	1,953	-38.70	-1.98%	11	25,255	0.4%	91.1	2.3%	19.6x	1.6x	UNILEVERCL	46,623	1.3%	0.6	69.9x	19.1x
Textile	1,043	1,066	-22.74	-2.13%	58	108,606	1.6%	305.4	7.7%	86.6x	0.7x	BXPHARMA	44,299	1.3%	168.8	6.9x	0.9x
Paper & Printing	4,444	4,440	+3.83	+0.09%	6	20,076	0.3%	126.6	3.2%	NM	0.9x	ICB	44,143	1.3%	6.4	34.8x	1.0x
Tannery	1,928	1,927	+0.67	+0.03%	6	21,479	0.3%	64.5	1.6%	NM	1.6x	DUTCHBANGL	42,008	1.2%	1.6	6.7x	0.9x
Jute	12,049	12,197	-148.49	-1.22%	3	2,652	0.0%	19.4	0.5%	NM	NM	EBL	36,670	1.0%	66.7	5.6x	0.9x
Ceramics	419	420	-1.33	-0.32%	5	18,786	0.3%	118.4	3.0%	NM	1.2x	POWERGRID	32,623	0.9%	5.5	NM	0.3x
Miscellaneous	4,208	4,242	-33.79	-0.80%	15	228,510	3.4%	311.9	7.9%	94.0x	1.9x	OLYMPIC	31,930	0.9%	28.6	17.3x	2.7x
Corporate Bond**	15,379	15,314	+64.60	+0.42%	16	33,683	0.5%	0.7	0.0%	NM	NM	PUBALIBANK	31,813	0.9%	4.9	3.3x	0.6x
Treasury Bond**	1,862	1,843	+18.90	+1.03%	236	3,160,568	47.4%	9.1	0.2%	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
RANFOUNDRY	157.1	+9.9%	14.5	7.2x	4.7x	SQURPHARMA	108,958	7.7%	8.6x	1.5x	BSC	99.0	-2.1%	210.3	5.2x	1.0x
ATLASBANG	54.7	+9.8%	2.3	NM	0.5x	ISLAMIBANK	74,730	5.3%	14.0x	0.9x	BXPHARMA	99.3	-2.6%	168.8	6.9x	0.9x
MIDLANDBNK	16.2	+9.5%	86.1	9.4x	1.1x	BEXIMCO	69,463	4.9%	NM	1.3x	SPCERAMICS	24.5	+3.4%	97.3	NM	0.8x
FAREASTFIN	3.5	+9.4%	5.9	NM	NM	BATBC	50,233	3.6%	10.0x	3.0x	BEACHHATCH	97.8	+1.2%	93.8	28.7x	6.5x
STANCERAM	72.4	+8.7%	2.2	NM	NM	WALTONHIL	46,773	3.3%	10.8x	1.3x	ABB1STMF	5.3	-	93.0	NM	0.6x
RELIANCE1	22.6	+7.62%	68.4	NM	2.1x	BRACBANK	46,489	3.3%	8.0x	1.2x	UTTARABANK	25.5	+0.4%	90.0	7.7x	0.8x
RENWICKJA	676.2	+7.5%	0.9	NM	NM	GP	44,708	3.2%	11.9x	6.7x	MIDLANDBNK	16.2	+9.5%	86.1	9.4x	1.1x
PHOENIXFIN	3.9	+5.4%	0.2	NM	NM	RENATA	32,968	2.3%	19.4x	1.7x	NLTUBES	87.9	+4.3%	77.4	45.1x	0.6x
VAMLRBBF	6.0	+5.3%	2.8	NM	0.5x	BXPHARMA	23,409	1.7%	6.9x	0.9x	RELIANCE1	22.6	+7.6%	68.4	NM	2.1x
EASTRNLUB	2,584.5	+5.0%	36.6	73.7x	12.4x	PUBALIBANK	22,905	1.6%	3.3x	0.6x	EBL	27.0	-	66.7	5.6x	0.9x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	4.3x	0.8x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
KBPPWBIL	121.1	-10.0%	58.4	NM	10.2x	LHB	20,953	1.5%	14.1x	2.9x	MARICO	2,425.0	2,425.0	1.0	96	233.84
SONARGAON	33.0	-9.6%	21.5	NM	2x	OLYMPIC	20,496	1.5%	17.3x	2.7x	ACI	212.0	202.2	10.0	458	96.83
SKTRIMS	12.0	-8.4%	4.0	NM	0.8x	ALARABANK	18,282	1.3%	14.9x	1.1x	BEACHHATCH	94.0	91.0	10.0	517	47.60
ESQUIRENIT	21.0	-8.3%	6.7	12.4x	0.3x	BEACONPHAR	17,838	1.3%	48.3x	4.2x	SQURPHARMA	217.8	217.8	1.0	150	32.67
SSSTEEL	7.2	-7.7%	8.1	34.3x	0.3x	PRIMEBANK	16,142	1.1%	3.3x	0.6x	PREMIERCER	55.1	55.0	16.0	483	26.59
MITHUNKNIT	14.9	-7.5%	3.4	NM	4.7x	ROBI	14,876	1.1%	19.3x	2.0x	HAMI	116.0	115.0	3.0	100	11.51
AIL	47.2	-6.7%	53.7	17.7x	2.0x	UTTARABANK	13,699	1.0%	7.7x	0.8x	EASTRNLUB	2,584.2	2,480.0	5.0	2	6.28
AMBEEPHA	854.2	-6.6%	10.6	NM	67.9x	NBL	13,055	0.9%	NM	2.2x	FINEFOODS	189.0	189.0	1.0	31	5.86
SAFKOSPINN	10.3	-6.4%	0.7	NM	NM	BSRMLTD	12,852	0.9%	5.1x	0.5x	RELIANCE1	21.5	21.3	5.0	266	5.71
DOMINAGE	10.4	-6.3%	6.5	94.5x	0.6x						ASIATICLAB	37.1	37.0	3.0	120	4.45
* 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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Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MARICO	2,425.0	2,425.0	233.8	96	1
ACI	212.0	202.2	96.8	458	10
BEACHHATCH	94.0	91.0	47.6	517	10
SQURPHARMA	217.8	217.8	32.7	150	1
PREMIERCEM	55.1	55.0	26.6	483	16
HAMI	116.0	115.0	11.5	100	3
EASTRNLUK	2,584.2	2,480.0	6.3	2	5
FINEFOODS	189.0	189.0	5.9	31	1
RELIANCE1	21.5	21.3	5.7	266	5
ASIATICLAB	37.1	37.0	4.5	120	3
DAFODILCOM	67.9	67.9	3.5	52	1
NRBBANK	11.9	11.9	3.4	285	1
IPDC	17.6	17.0	3.1	179	3
LOVELLO	88.2	88.2	0.9	10	1
CVOPRL	148.0	148.0	0.8	5	1
MIDLANDBNK	15.2	15.2	0.7	47	1
LRBDL	13.4	13.4	0.7	50	1
REPUBLIC	29.4	29.4	0.6	21	1
NLTUBES	82.5	82.5	0.6	7	1
CRYSTALINS	48.1	48.1	0.6	12	1
KAY&QUE	229.9	229.9	0.6	3	1
UNIQUEHRL	46.0	46.0	0.6	12	1
Total			489.4		73

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
RECKITTBN		0.0%	3330.0%	Record Date	29-Apr-25
EASTLAND		0.0%	10.0%	Record Date	2-Jun-25

Important DSE News

RUNNERAUTO

Mr. Md. Mozammel Hossain, a Sponsor Director of the company, has expressed his intention to transfer 2,270,800 shares of the company to his son Mr. Mahamud Al Nahian and 1,135,400 shares of the company to his daughter Ms. Nowsheen Ishrat Promee (both are general shareholder of the company), by way of gift outside the trading system of the Exchange within April 30, 2025.

ILFSL

With reference to the Honorable Supreme Court of Bangladesh High Court Division (Company Matter No 299 2019), the company has informed that the Board of Directors of International Leasing and Financial Services Limited (ILFSL) has been reconstructed by the Honorable court on March 25, 2025. According to the Court order, the newly reconstructed "Board of Directors" are as follows: 1. Mr. Md. Mahbubul Hoque, Court-appointed Independent Chairman in the Board (Former Deputy Auditor General of Bangladesh, Secretary Grade 1), 2. Mr. Md. Abdul Mannan, Director (Former Executive Director, Bangladesh Bank), 3. Mr. Md. Ashrafuzzaman, ACA, Director (Former SAVP, Shajalal Islami Bank), 4. Mr. Abu Habib Khairul Kabir, Director (Former Deputy Managing Director, Pubali Bank), 5. Barrister Mohammad Ashraf Ali, Director (Advocate, Supreme Court of Bangladesh), 6. Mr. Md. Mustafizur Rahman Sardar, Director (Retired Executive Director, Bangladesh Bank) and 7. Mr. Ahmad Mushfeq Anam, Director (Electric & Electronic Engineer, Managing Director, X-ter Limited).

CROWNCEMNT

Mr. Md. Alamgir Kabir, a Sponsor Director of the company, has expressed his intention to transfer 2,970,000 shares of the company to his son Mr. Solaiman Kabir; 1,500,000 shares of the company to his spouse Ms. Kamrun Nahar; 500,000 shares of the company to his daughter Ms. Raisa Kabir; 500,000 shares of the company to his son Mr. Raihanul Kabir and 500,000 shares of the company to his daughter Ms. Nusaibah Kabir, (all are general shareholder of the company), by way of gift outside the trading system of the Exchange within April 30, 2025.

Mr. Mohammed Jahangir Alam, a Sponsor Director of the company, has expressed his intention to transfer 1,500,000 shares of the company to his son Mr. Salehin Musfique Sadaf (general shareholder of the company), by way of gift outside the trading system of the Exchange within April 30, 2025.

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