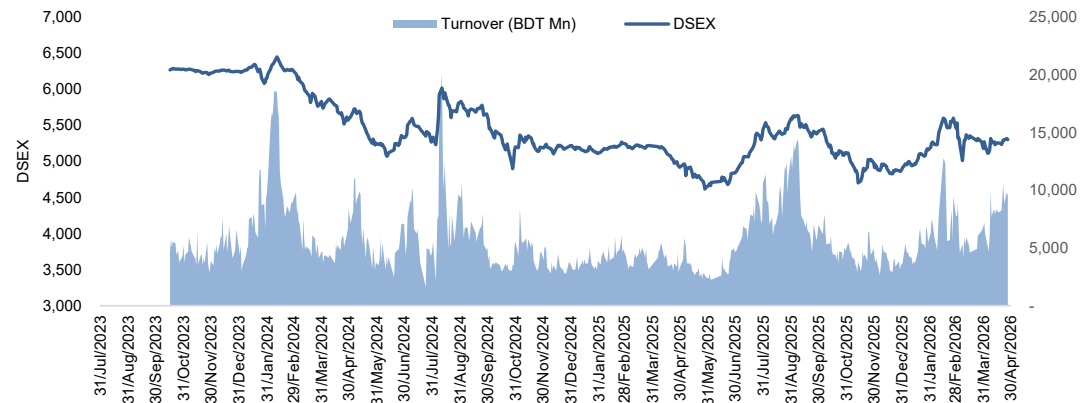


Daily Market Update

Market closed in red

The market closed in red today. The benchmark index DSEX (-0.29%) lost 15.61 points and closed at 5,300.57. The blue-chip index DS30 (-0.42%), the Shariah-based index DSES (-0.80%), and the large-cap index CDSET (-0.11%) closed at 2,017.74, 1,056.67, and 1,076.25 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.27% followed by Food & Allied (-0.73%), Telecommunication (-0.73%), Engineering (-0.56%), Pharmaceutical (-0.48%), Bank (+0.05%), and Fuel & Power (+0.05%), respectively. Block trades contributed 3.7% of the overall market turnover. Reliance Insurance PLC. (+9.9%) was the most traded share with a turnover of BDT 486 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,300.57	5,316.18	-15.61	-0.29%	+8.9%
DS30	2,017.74	2,026.30	-8.56	-0.42%	+8.9%
DSES	1,056.67	1,065.21	-8.54	-0.80%	+5.6%
CDSET	1,076.25	1,077.43	-1.18	-0.11%	+7.1%

	Advanced	Declined	Unchanged	Total
All Category	102	223	67	392
A Category (Equity)	66	103	35	204
B Category (Equity)	12	61	8	81
N Category (Equity)	0	0	0	0
Z Category (Equity)	24	59	24	107
Mutual Funds	8	10	16	34
Corporate Bonds	0	1	1	2
Treasury Bonds	0	2	1	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,838,024	6,877,033	-0.6%
	Mn USD	55,652	55,969	
Turnover	Mn BDT	9,560	9,824	-2.7%
	Mn USD	78	80	
Volume	Mn Shares	291	312	-6.9%
No. of Trade		235,384	253,698	-7.2%

* Average Interbank Exchange Rate is BDT 122.87 as of Apr 27, 2026

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Figure: Sectorial Turnover (BDT Mn)

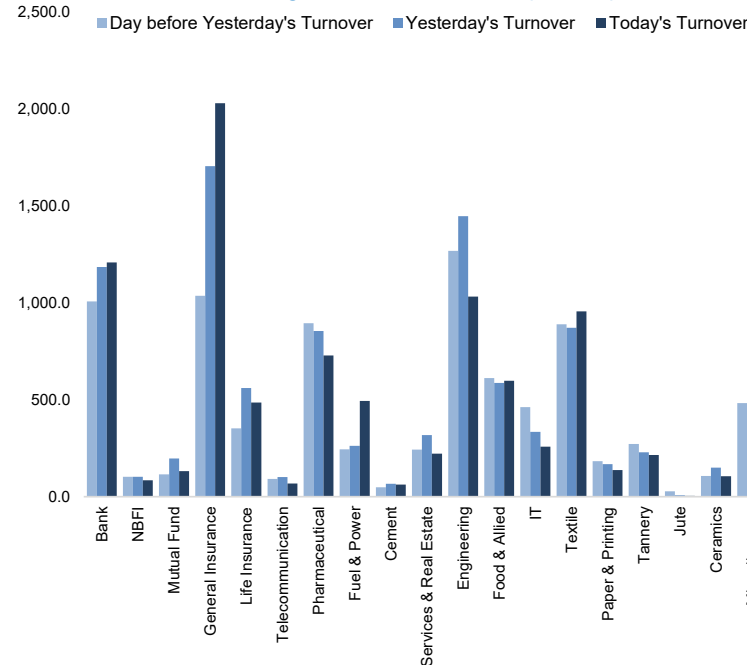
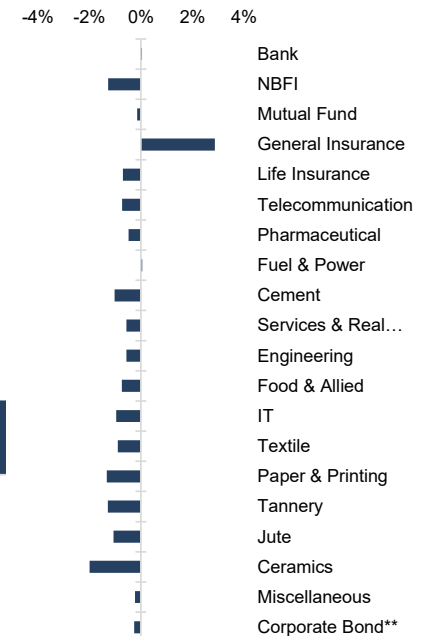


Figure: Sectorial Mcap Change



Market PE 14.9x

Market PB 1.6x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFIs and Banks

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	1,563	1,563	+0.73	+0.05%	36	729,724	10.7%	1,207.3	13.1%	9.4x	0.7x	GP	330,418	9.6%	25.9	11.1x	5.3x
NBFI	954	967	-12.29	-1.27%	23	90,256	1.3%	84.6	0.9%	NM	0.9x	SQRPHARMA	188,371	5.5%	24.9	7.3x	1.3x
Mutual Fund	529	529	-0.76	-0.14%	36	25,463	0.4%	132.2	1.4%	NM	0.5x	ROBI	149,805	4.4%	30.6	16.0x	2.1x
General Insurance	3,651	3,549	+101.92	+2.87%	43	103,063	1.5%	2,027.9	22.0%	16.5x	1.5x	BRACBANK	147,129	4.3%	130.3	8.1x	1.4x
Life Insurance	1,833	1,846	-12.93	-0.70%	15	51,670	0.8%	485.5	5.3%	NM	NM	WALTONHIL	123,392	3.6%	6.0	11.0x	1.0x
Telecommunication	4,371	4,403	-32.14	-0.73%	3	507,157	7.4%	68.0	0.7%	12.1x	3.4x	BATBC	118,692	3.5%	32.6	20.3x	2.1x
Pharmaceutical	2,975	2,990	-14.43	-0.48%	34	561,652	8.2%	727.6	7.9%	11.7x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,050	1,050	+0.54	+0.05%	23	277,256	4.1%	493.3	5.4%	9.5x	0.6x	MARICO	86,918	2.5%	2.4	13.8x	29.9x
Cement	1,856	1,875	-19.17	-1.02%	7	87,321	1.3%	63.0	0.7%	18.3x	1.9x	UPGDCL	68,752	2.0%	3.2	6.4x	1.5x
Services & Real Estate	1,017	1,023	-5.75	-0.56%	9	55,354	0.8%	222.5	2.4%	20.7x	0.4x	BERGERPBL	67,958	2.0%	2.6	20.4x	3.6x
Engineering	2,451	2,464	-13.73	-0.56%	42	274,702	4.0%	1,031.4	11.2%	15.6x	0.8x	LHB	57,140	1.7%	21.6	11.2x	3.0x
Food & Allied	12,298	12,389	-90.98	-0.73%	21	224,505	3.3%	597.6	6.5%	31.5x	3.4x	BXPBARMA	51,749	1.5%	32.4	8.1x	1.0x
IT	2,069	2,089	-19.91	-0.95%	11	27,402	0.4%	258.0	2.8%	30.4x	1.7x	CITYBANK	50,657	1.5%	369.0	3.8x	0.8x
Textile	1,156	1,166	-10.43	-0.89%	58	120,243	1.8%	955.1	10.4%	NM	0.8x	RENATA	47,668	1.4%	4.5	18.8x	1.3x
Paper & Printing	4,497	4,557	-60.47	-1.33%	6	21,062	0.3%	137.4	1.5%	NM	1.2x	PUBALIBANK	46,331	1.3%	34.5	7.5x	0.6x
Tannery	2,039	2,065	-26.49	-1.28%	6	23,674	0.3%	215.0	2.3%	NM	1.4x	EBL	44,364	1.3%	60.4	5.3x	0.9x
Jute	10,788	10,904	-115.92	-1.06%	3	2,353	0.0%	4.7	0.1%	NM	NM	UNILEVERCL	40,306	1.2%	0.5	51.8x	17.1x
Ceramics	407	415	-8.26	-1.99%	5	18,385	0.3%	106.0	1.2%	NM	1.2x	PRIMEBANK	39,112	1.1%	83.3	4.3x	0.8x
Miscellaneous	3,917	3,926	-9.01	-0.23%	15	212,712	3.1%	382.5	4.2%	89.6x	1.6x	DUTCHBANGL	38,958	1.1%	16.9	7.9x	0.7x
Corporate Bond**	17,746	17,792	-45.55	-0.26%	16	39,158	0.6%	0.8	0.0%	NM	NM	ICB	31,655	0.9%	5.1	NM	1.1x
Treasury Bond**	2,206	2,224	-17.75	-0.80%	232	3,388,250	49.5%	2.2	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
RELIANCINS	81.2	+9.9%	485.7	9.6x	1.0x	SQRPHARMA	105,205	7.2%	7.3x	1.3x	RELIANCINS	81.2	+9.9%	485.7	9.6x	1.0x
BGIC	39.1	+9.8%	33.4	23.7x	2.0x	BRACBANK	79,200	5.4%	8.1x	1.4x	CITYBANK	33.3	-0.3%	369.0	3.8x	0.8x
EBLNRBMF	3.3	+6.5%	11.8	NM	0.4x	BEXIMCO	69,465	4.7%	NM	1.3x	LOVELLO	85.3	-1.3%	315.7	36.5x	6.8x
GREENDELTA	64.2	+6.3%	32.9	7.1x	0.9x	ISLAMIBANK	58,177	4.0%	NM	0.8x	DOMINAGE	63.0	+3.3%	263.5	NM	3.7x
SHEPHERD	15.6	+6.1%	86.6	NM	1.2x	WALTONHIL	40,608	2.8%	11.0x	1.0x	SPCL	55.4	+5.1%	215.2	10.9x	1.3x
PARAMOUNT	55.6	+5.70%	41.9	25.4x	2.0x	BXPBARMA	36,157	2.5%	8.1x	1.0x	PEOPLESINS	56.0	+2.0%	174.7	18.9x	1.4x
EASTERNINS	61.3	+5.7%	30.3	24.2x	1x	CITYBANK	35,272	2.4%	3.8x	0.8x	SUNLIFEINS	72.8	-2.8%	173.7	NM	NM
BDFINANCE	12.2	+5.2%	3.5	NM	NM	PUBALIBANK	33,266	2.3%	7.5x	0.6x	PTL	64.1	+1.1%	173.1	10.1x	1.4x
SPCL	55.4	+5.1%	215.2	10.9x	1.3x	GP	33,042	2.2%	11.1x	5.3x	ASIATICLAB	106.4	+0.8%	170.3	28.7x	1.9x
PRAGATIINS	78.2	+5.1%	115.5	14.7x	1.4x	BATBC	31,394	2.1%	20.3x	2.1x	KBPPWBIL	49.0	+0.2%	132.7	87.5x	4.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MEGHNACEM	31.5	-8.7%	1.6	NM	NM	SHEPHERD	13.3	13.3	28.0	10,000	133.00
ECABLES	122.7	-7.5%	7.7	NM	0x	DOMINAGE	60.0	57.0	11.0	723	42.29
TUNGHAI	2.9	-6.0%	12.3	NM	1.5x	FEDERALINS	24.8	20.5	6.0	1,223	25.18
JMISMDL	130.4	-6.0%	12.3	NM	1.5x	STANDBANKL	5.6	5.6	5.0	4,300	24.08
HFL	15.1	-5.6%	3.5	NM	0.5x	DAFODILCOM	109.5	105.0	14.0	219	23.87
APEXFOODS	263.5	-5.6%	43.4	37.4x	1.7x	APEXSPINN	328.0	328.0	3.0	60	19.61
MIRAKHTER	34.1	-5.5%	66.5	21.9x	0.7x	CITYGENINS	100.0	92.0	12.0	175	16.88
APEXSPINN	339.6	-5.5%	129.9	NM	4.1x	SUNLIFEINS	77.0	76.0	3.0	189	14.54
BENGALWTL	24.3	-5.1%	30.8	44.2x	0.9x	ASIATICLAB	98.4	98.0	3.0	100	9.82
SOUTHEASTB	9.7	-4.9%	29.5	16.5x	0.4x	GQBALLPEN	630.0	570.0	6.0	16	9.28

*. Bank and NBFI sector PE calculation methodology has been modified.
 ** 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
SHEPHERD	13.3	13.3	133.0	10,000	28
DOMINAGE	60.0	57.0	42.3	723	11
FEDERALINS	24.8	20.5	25.2	1,223	6
STANDBANKL	5.6	5.6	24.1	4,300	5
DAFODILCOM	109.5	105.0	23.9	219	14
APEXSPINN	328.0	328.0	19.6	60	3
CITYGENINS	100.0	92.0	16.9	175	12
SUNLIFEINS	77.0	76.0	14.5	189	3
ASIATICLAB	98.4	98.0	9.8	100	3
GQBALLPEN	630.0	570.0	9.3	16	6
NRBCBANK	7.3	7.3	7.3	999	1
MIRAKHTER	38.5	36.2	6.8	179	2
BNICL	91.5	91.5	4.6	50	1
KBPPWBIL	53.7	51.4	3.1	59	2
AGNISYSL	24.0	24.0	2.4	100	1
IDLC	38.6	38.6	2.3	60	1
ICBEMF1S1	5.8	5.7	1.6	275	2
QUASEMIND	44.9	41.2	1.6	37	2
SINOBANGLA	55.0	55.0	1.1	21	1
BENGALWTL	25.0	25.0	1.0	40	1
CVOPRL	163.0	163.0	1.0	6	1
ACMEPL	25.5	25.5	0.9	36	1
Total			357.4		116

Important DSE News

BRACBANK

The Board of Directors has recommended 15% cash and 15% stock dividend for all shareholders for the year ended 31-Dec-2025. Date of AGM: 11-Jun-2026, Time: 11:00 AM, Venue: Digital Platform. Record Date: 17-May-2026. The Company has also reported Consolidated EPS of Tk. 9.12, Consolidated NAV per share of Tk. 51.56 and Consolidated NOCFPS of Tk. 72.72 for the year ended 31-Dec-2025 as against Consolidated Tk. 6.18, Consolidated Tk. 39.38 and Consolidated Tk. 54.14 respectively for the year ended 31-Dec-2024.

RUPALIINS

The Board of Directors has recommended 10% Dividend (5% Cash and 5% Stock) for the year ended December 31, 2025. Date of AGM: 29.07.2026, Time: 11:00 AM, Venue: Digital Platform. Record Date: 04.06.2026. The Company has also reported EPS of Tk. 1.02, NAV per share of Tk. 20.41 and NOCFPS of Tk. 1.28 for the year ended December 31, 2025 as against Tk. 0.99, Tk. 20.41 and Tk. 0.39 respectively for the year ended December 31, 2024.

SALVO

(Q3 Un-audited): EPS was Tk. 0.19 for January-March 2026 as against Tk. 0.17 for January-March 2025; EPS was Tk. 0.44 for July 2025-March 2026 as against Tk. 0.39 for July 2024-March 2025. NOCFPS was Tk. 2.22 for July 2025-March 2026 as against Tk. 3.68 for July 2024-March 2025. NAV per share was Tk. 16.72 as on March 31, 2026 and Tk. 16.57 as on June 30, 2025.

INTECH

(Q3 Un-audited): EPS was Tk. (0.11) for January-March 2026 as against Tk. (0.11) for January-March 2025; EPS was Tk. (0.28) for July 2025-March 2026 as against Tk. (0.29) for July 2024-March 2025. NOCFPS was Tk. (0.12) for July 2025-March 2026 as against Tk. (0.01) for July 2024-March 2025. NAV per share was Tk. (0.72) as on March 31, 2026 and Tk. (0.45) as on June 30, 2025.

AGNISYSL

(Q3 Un-audited): EPS was Tk. 0.25 for January-March 2026 as against Tk. 0.16 for January-March 2025; EPS was Tk. 0.82 for July 2025-March 2026 as against Tk. 1.08 for July 2024-March 2025. NOCFPS was Tk. 1.29 for July 2025-March 2026 as against Tk. 1.26 for July 2024-March 2025. NAV per share was Tk. 17.52 as on March 31, 2026 and Tk. 16.95 as on June 30, 2025. (cont.)

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
LINDEBD		0.0%	100.0%	Record Date	29-Apr-26
SHAHJABANK		0.0%	13.0%	Record Date	30-Apr-26
CITYBANK		15.0%	15.0%	Record Date	03-May-26
EBL		3.0%	25.0%	Record Date	06-May-26
NITOLINS		0.0%	10.0%	Record Date	10-May-26
PRAGATIINS		3.0%	27.0%	Record Date	12-May-26
BNICL		0.0%	22.0%	Record Date	13-May-26
BRACBANK		15.0%	15.0%	Record Date	17-May-26
CENTRALINS		0.0%	12.0%	Record Date	20-May-26
EASTLAND		0.0%	10.0%	Record Date	02-Jun-26
ASIAINS		0.0%	10.0%	Record Date	03-Jun-26
RUPALIINS		5.0%	5.0%	Record Date	04-Jun-26

ENVOYTEX

(Q3 Un-audited): EPS was Tk. 1.54 for January-March 2026 as against Tk. 2.44 for January-March 2025; EPS was Tk. 5.89 for July 2025-March 2026 as against Tk. 6.03 for July 2024-March 2025. NOCFPS was Tk. 16.85 for July 2025-March 2026 as against Tk. 3.27 for July 2024-March 2025. NAV per share was Tk. 61.21 as on March 31, 2026 and Tk. 58.32 as on June 30, 2025.

The company has informed that the Board of Directors of the company during its 252nd Meeting held on 26 April 2026 has approved the expansion of Open-End (Rotor) Spinning production capacity from the existing 25 MT per day to 50 MT per day at the existing factory premises. The project aims to increase yarn production capacity to utilize recovered materials from existing production processes and to leverage currently underutilized capacity. The yarn produced will be prioritized for in-house denim manufacturing to maximize vertical integration and operational efficiency. The total estimated cost of the project is BDT 1,791.53 million, to be financed through a debt-equity ratio of 70:30. The expansion project will feature state-of-the-art open-end rotor spinning yarn production facilities.

PRIMEBANK

(Q1 Un-audited): Consolidated EPS was Tk. 1.79 for January-March 2026 as against Tk. 1.80 for January-March 2025. Consolidated NOCFPS was Tk. 8.54 for January-March 2026 as against Tk. 13.11 for January-March 2025. Consolidated NAV per share was Tk. 41.69 as on March 31, 2026 and Tk. 33.60 as on March 31, 2025.

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