

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.26%) gained 59.66 points and closed at 4,783.66. The blue-chip index DS30 (+0.90%), the Shariah-based index DSES (+1.63%), and the large-cap index CDSET (+0.58%) closed at 1,787.53, 1,045.39, and 978.38 points, respectively. All of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.17% followed by Engineering (+2.15%), Fuel & Power (+1.39%), Telecommunication (+1.23%), Food & Allied (+1.12%), Bank (+0.76%), and Pharmaceutical (+0.36%), respectively. Block trades contributed 9.7% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-0.1%) was the most traded share with a turnover of BDT 237 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,783.66	4,724.00	+59.66	+1.26%	-8.3%
DS30	1,787.53	1,771.55	+15.99	+0.90%	-7.8%
DSES	1,045.39	1,028.67	+16.72	+1.63%	-10.6%
CDSET	978.38	972.75	+5.63	+0.58%	-8.2%

	Advanced	Declined	Unchanged	Total
All Category	315	36	46	397
A Category (Equity)	179	15	23	217
B Category (Equity)	70	7	7	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	66	14	16	96
Mutual Funds	20	2	14	36
Corporate Bonds	1	0	1	2
Treasury Bonds	2	0	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,499,465	6,463,648	+0.6%
	Mn USD	52,869	52,578	
Turnover	Mn BDT	4,174	2,630	+58.7%
	Mn USD	34	21	
Volume	Mn Shares	163	107	+53.0%
No. of Trade		137,693	94,135	+46.3%

* Average Interbank Exchange Rate is BDT 122.94 as of Jun 16, 2025

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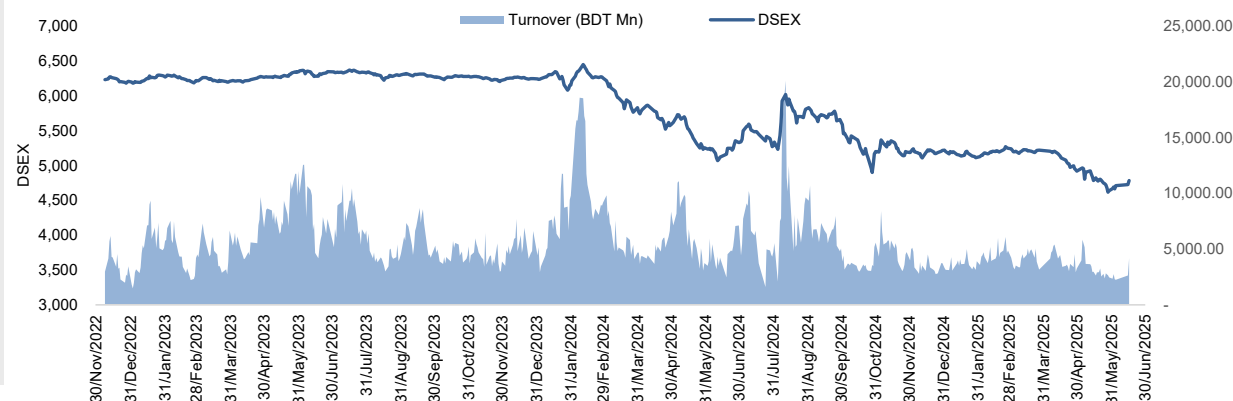


Figure: Sectorial Turnover (BDT Mn)

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

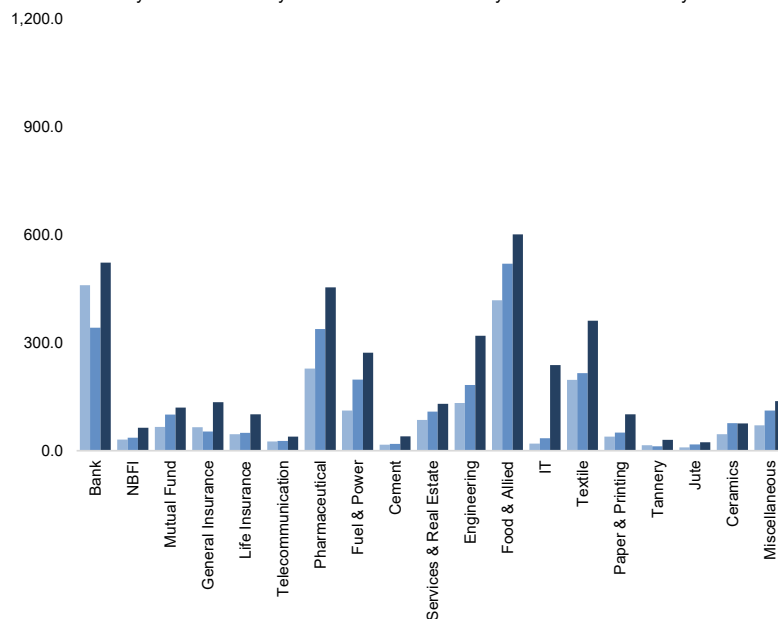
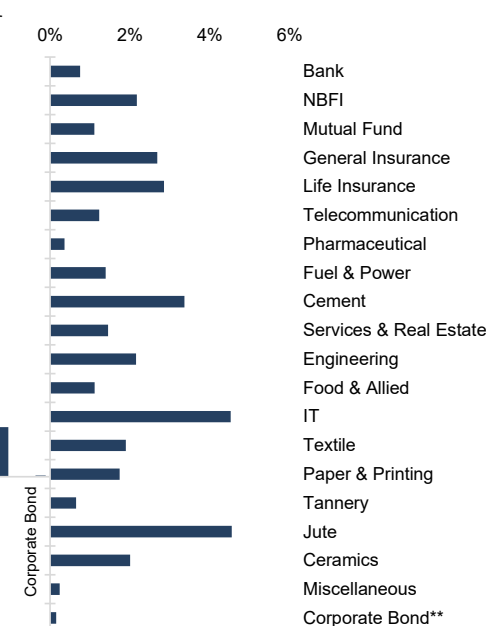


Figure: Sectorial Mcap Change



Market PE 12.9x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBFi, ABBANK, IFIC, FIRSTSBANK 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	1,309	1,299	+9.82	+0.76%	36	619,163	9.5%	522.0	13.9%	18.0x	0.6x	GP	386,726	11.9%	11.7	13.2x	5.4x
NBFI	952	932	+20.26	+2.17%	23	90,763	1.4%	64.0	1.7%	NM	NM	SQURPHARMA	179,684	5.5%	112.7	7.6x	1.3x
Mutual Fund	621	614	+6.83	+1.11%	37	28,524	0.4%	119.9	3.2%	NM	0.5x	BATBC	151,848	4.7%	55.3	9.2x	2.9x
General Insurance	2,387	2,325	+62.43	+2.69%	43	68,082	1.0%	134.7	3.6%	11.5x	1.0x	ROBI	127,806	3.9%	24.0	17.7x	1.8x
Life Insurance	1,574	1,530	+43.68	+2.85%	15	41,863	0.6%	101.4	2.7%	NM	NM	WALTONHIL	122,747	3.8%	4.9	9.5x	1.1x
Telecommunication	4,581	4,525	+55.77	+1.23%	3	537,144	8.3%	39.3	1.0%	14.2x	3.4x	BEXIMCO	103,850	3.2%	1.4	NM	1.3x
Pharmaceutical	2,738	2,728	+9.83	+0.36%	34	519,064	8.0%	453.9	12.0%	12.0x	1.4x	BRACBANK	99,546	3.1%	199.1	7.3x	1.2x
Fuel & Power	1,062	1,048	+14.62	+1.39%	23	281,443	4.3%	271.9	7.2%	17.7x	0.6x	BERGERPBL	80,809	2.5%	2.5	23.5x	5.6x
Cement	1,730	1,673	+56.37	+3.37%	7	82,426	1.3%	40.2	1.1%	19.7x	1.8x	MARICO	74,674	2.3%	3.9	12.6x	9.9x
Services & Real Estate	914	901	+13.09	+1.45%	9	50,251	0.8%	130.1	3.5%	23.1x	0.4x	UPGDCL	69,853	2.1%	3.1	6.0x	1.7x
Engineering	2,219	2,172	+46.76	+2.15%	42	250,298	3.9%	319.5	8.5%	11.5x	0.8x	ISLAMIBANK	53,935	1.7%	3.6	11.6x	0.7x
Food & Allied	14,177	14,020	+156.71	+1.12%	21	259,400	4.0%	600.9	15.9%	15.0x	4.1x	LHB	51,913	1.6%	23.8	14.5x	2.6x
IT	1,721	1,647	+74.49	+4.52%	11	22,703	0.3%	237.7	6.3%	19.1x	1.4x	UNILEVERCL	44,564	1.4%	0.5	76.6x	17.3x
Textile	1,000	982	+18.66	+1.90%	58	104,185	1.6%	360.7	9.6%	NM	0.7x	ICB	40,674	1.2%	12.5	NM	1.0x
Paper & Printing	3,986	3,918	+68.38	+1.75%	6	18,009	0.3%	101.3	2.7%	NM	0.9x	BXPBARMA	38,901	1.2%	39.8	6.1x	0.8x
Tannery	1,839	1,827	+11.97	+0.66%	6	20,490	0.3%	30.2	0.8%	63.0x	1.5x	DUTCHBANGL	38,088	1.2%	1.9	8.8x	0.7x
Jute	10,399	9,947	+452.64	+4.55%	3	2,289	0.0%	23.2	0.6%	NM	NM	EBL	36,225	1.1%	19.6	5.3x	0.7x
Ceramics	373	366	+7.32	+2.00%	5	16,727	0.3%	75.4	2.0%	NM	1.1x	PUBALIBANK	32,666	1.0%	1.0	4.2x	0.6x
Miscellaneous	4,123	4,113	+9.81	+0.24%	15	223,881	3.4%	137.6	3.6%	88.1x	1.8x	OLYMPIC	30,371	0.9%	4.4	16.4x	2.5x
Corporate Bond**	15,527	15,503	+23.97	+0.15%	16	34,008	0.5%	3.4	0.1%	NM	NM	CITYBANK	29,512	0.9%	26.0	2.9x	0.6x
Treasury Bond**	2,015	2,015	-0.64	-0.03%	234	3,228,035	49.7%	1.2	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
BAYLEASING	4.4	+10.0%	0.3	NM	1.3x	SQURPHARMA	108,958	7.7%	7.6x	1.3x	LOVELLO	95.6	-0.1%	237.1	43.1x	7.6x
NHFIL	23.4	+9.9%	6.8	49.8x	1.2x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	BRACBANK	50.0	-0.4%	199.1	7.3x	1.2x
AGNISYSL	28.0	+9.8%	125.9	21.1x	1.6x	BEXIMCO	69,463	4.9%	NM	1.3x	BEACHHATCH	46.2	+1.3%	152.3	9.9x	2.8x
STANDBANKL	5.6	+9.8%	8.7	7.5x	0.3x	BATBC	50,233	3.6%	9.2x	2.9x	AGNISYSL	28.0	+9.8%	125.9	21.1x	1.6x
BDCOM	23.7	+9.7%	35.7	28.8x	1.6x	WALTONHIL	46,773	3.3%	9.5x	1.1x	SQURPHARMA	202.7	-0.5%	112.7	7.6x	1.3x
CENTRALINS	27.3	+9.64%	15.1	15.7x	0.5x	BRACBANK	46,489	3.3%	7.3x	1.2x	ORIONINFU	335.1	+7.6%	76.4	NM	21.3x
ORIONINFU	335.1	+7.6%	76.4	NM	21x	GP	44,708	3.2%	13.2x	5.4x	MIDLANDBNK	24.2	-	71.8	19.0x	1.6x
BDWELDING	9.9	+7.6%	0.1	NM	0.9x	RENATA	32,968	2.3%	19.6x	1.6x	SEAPEARL	48.5	-3.0%	71.1	NM	2.9x
NORTHERN	96.6	+7.5%	0.3	NM	1.2x	BXPBARMA	23,409	1.7%	6.1x	0.8x	BSC	91.5	+1.7%	70.6	4.6x	0.9x
PADMALIFE	19.3	+7.2%	0.5	NM	NM	PUBALIBANK	22,905	1.6%	4.2x	0.6x	OIMEX	25.5	+1.2%	57.8	26.5x	6.6x
						CITYBANK	21,020	1.5%	2.9x	0.6x						
						LHB	20,953	1.5%	14.5x	2.6x						
						OLYMPIC	20,496	1.5%	16.4x	2.5x						
						ALARABANK	18,282	1.3%	36.4x	0.8x						
						BEACONPHAR	17,838	1.3%	29.0x	3.9x						
						PRIMEBANK	16,142	1.1%	3.1x	0.6x						
						ROBI	14,876	1.1%	17.7x	1.8x						
						UTTARABANK	13,699	1.0%	NM	0.6x						
						NBL	13,055	0.9%	NM	8.0x						
						BSRMLTD	12,852	0.9%	4.2x	0.5x						
						* 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										
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB											
SHYAMPSUG	121.1	-3.4%	0.5	NM	NM											
ASIAPACINS	29.4	-3.3%	3.0	17.2x	1x											
SEAPEARL	48.5	-3.0%	71.1	NM	2.9x											
NBL	3.6	-2.7%	3.6	NM	8.0x											
IFIC1STMF	3.7	-2.6%	3.0	NM	0.4x											
ZAHINTEX	4.2	-2.3%	0.3	NM	0.6x											
UNILEVERCL	2,312.1	-2.2%	0.5	76.6x	17.3x											
FAREASTFIN	4.5	-2.2%	1.0	NM	NM											
ICB3RDNRB	4.6	-2.1%	0.6	NM	0.8x											
NFML	10.6	-1.9%	1.6	NM	1.0x											
Block Trade		Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)										
LOVELLO	94.0	86.2	22.0	2,007	178.60											
CENTRALINS	27.3	26.5	20.0	1,837	48.96											
AGNISYSL	26.8	26.4	10.0	1,475	39.41											
SUNLIFEINS	62.0	62.0	3.0	490	30.38											
ASIATICLAB	39.9	36.9	4.0	737	27.37											
ABB1STMF	4.7	4.7	4.0	3,892	18.30											
FINEFOODS	244.8	215.0	5.0	61	13.92											
SHAHJABANK	15.1	15.1	1.0	499	7.54											
RELIANCE1	17.9	17.8	8.0	316	5.64											
EBL	20.3	20.3	1.0	275	5.59											

* 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	Important DSE News
LOVELLO	94.0	86.2	178.6	2,007	22	
CENTRALINS	27.3	26.5	49.0	1,837	20	
AGNISYSL	26.8	26.4	39.4	1,475	10	
SUNLIFEINS	62.0	62.0	30.4	490	3	
ASIATICLAB	39.9	36.9	27.4	737	4	
ABB1STMF	4.7	4.7	18.3	3,892	4	
FINEFOODS	244.8	215.0	13.9	61	5	
SHAHJABANK	15.1	15.1	7.5	499	1	
RELIANCE1	17.9	17.8	5.6	316	8	
EBL	20.3	20.3	5.6	275	1	
INTRACO	23.4	23.4	4.9	210	1	
SEMLLECMF	10.8	10.8	4.9	452	1	
DBH	32.9	32.9	3.3	100	2	
BATBC	264.0	264.0	2.1	8	1	
MTB	10.0	10.0	2.0	200	1	
KDSALTD	41.5	41.5	2.0	48	1	
AL-HAJTEX	123.0	117.6	1.8	15	2	
BEACONPHAR	116.6	116.6	1.7	14	1	
NATLIFEINS	85.0	85.0	1.5	18	1	
GLOBALINS	28.9	28.6	1.4	50	2	
PRIMEINSUR	23.5	23.5	1.0	42	1	
SIMTEX	15.8	15.8	0.8	53	1	
Total			405.2		96	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ISLAMIINS		0.0%	20.0%	Record Date	18-Jun-25
ICICL		0.0%	10.0%	Record Date	18-Jun-25
AGRANINS		6.0%	0.0%	Record Date	18-Jun-25
ILFSL		0.0%	0.0%	Record Date	19-Jun-25
NITOLINS		5.0%	5.0%	Record Date	24-Jun-25
ONEBANKPLC		0.0%	0.0%	Record Date	24-Jun-25
DHAKABANK		5.0%	5.0%	Record Date	25-Jun-25
SICL		0.0%	5.0%	Record Date	26-Jun-25
PHOENIXFIN		0.0%	0.0%	Record Date	26-Jun-25
SBACBANK		0.0%	0.0%	Record Date	26-Jun-25
NRBCBANK		0.0%	0.0%	Record Date	26-Jun-25
ABBANK		0.0%	0.0%	Record Date	26-Jun-25
PURABIGEN		0.0%	10.0%	Record Date	29-Jun-25
ALARABANK		0.0%	0.0%	Record Date	29-Jun-25
STANDBANKL		0.0%	0.0%	Record Date	29-Jun-25

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