

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.92%) lost 43.97 points and closed at 4,739.69. The blue-chip index DS30 (-0.97%), the Shariah-based index DSES (-1.11%), and the large-cap index CDSET (-0.59%) closed at 1,770.21, 1,033.81, and 972.61 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.28% followed by Food & Allied (-1.36%), Telecommunication (-1.03%), Bank (-0.76%), Engineering (-0.68%), Fuel & Power (-0.65%), and Pharmaceutical (-0.62%), respectively. Block trades contributed 2.7% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+0.2%) was the most traded share with a turnover of BDT 206 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,739.69	4,783.66	-43.97	-0.92%	-9.1%
DS30	1,770.21	1,787.53	-17.32	-0.97%	-8.7%
DSES	1,033.81	1,045.39	-11.58	-1.11%	-11.6%
CDSET	972.61	978.38	-5.77	-0.59%	-8.8%

	Advanced	Declined	Unchanged	Total
All Category	67	276	54	397
A Category (Equity)	38	148	32	218
B Category (Equity)	14	65	4	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	15	63	18	96
Mutual Funds	1	16	19	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,486,473	6,499,465	-0.2%
	Mn USD	52,769	52,874	
Turnover	Mn BDT	3,136	4,174	-24.9%
	Mn USD	26	34	
Volume	Mn Shares	138	163	-15.8%
No. of Trade		118,295	137,693	-14.1%

* Average Interbank Exchange Rate is BDT 122.92 as of Jun 17, 2025

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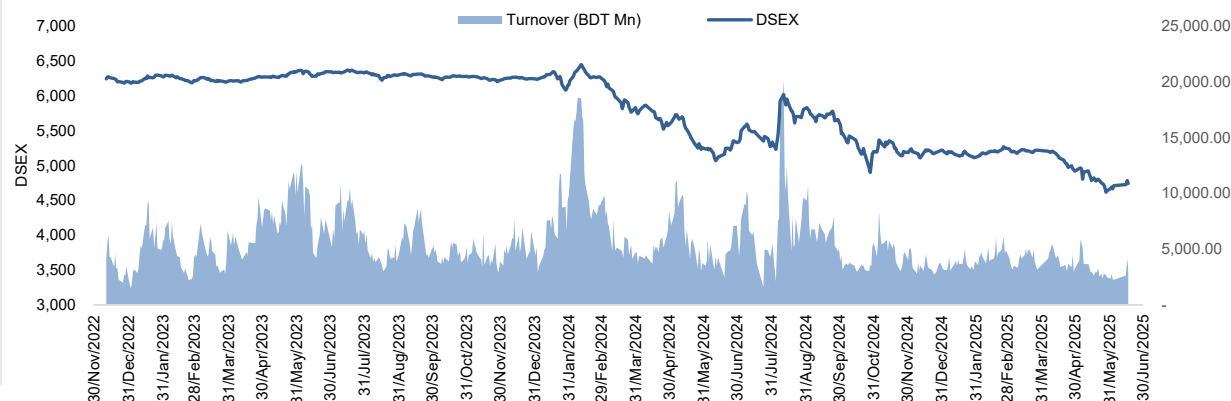


Figure: Sectorial Turnover (BDT Mn)

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

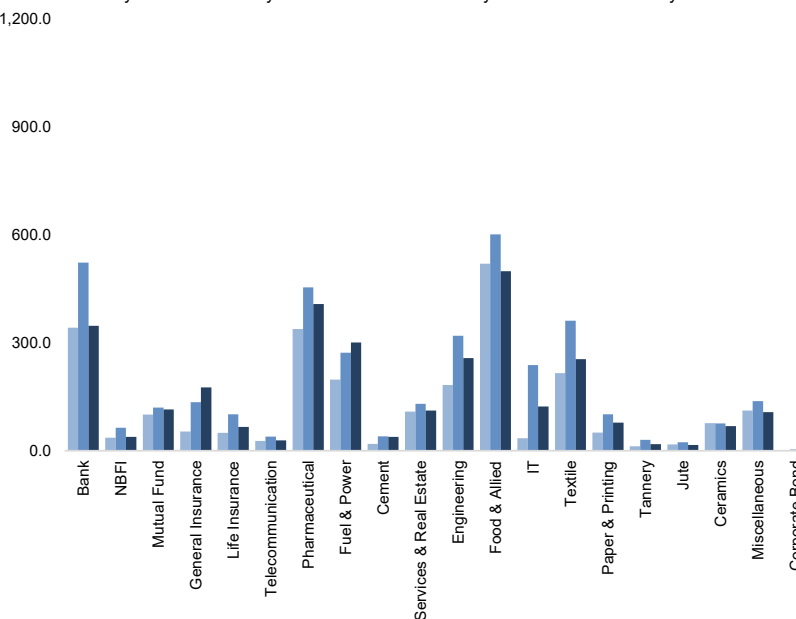
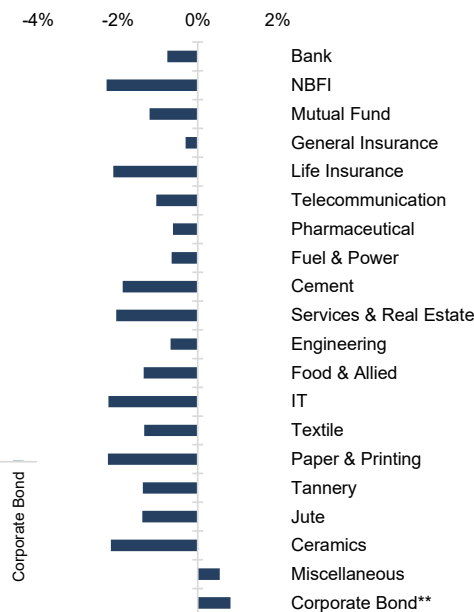


Figure: Sectorial Mcap Change



Market PE 12.8x

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	1,299	1,309	-10.00	-0.76%	36	614,432	9.5%	346.6	11.4%	17.8x	0.6x	GP	384,295	11.9%	13.4	13.1x	5.4x
NBFI	931	952	-21.75	-2.28%	23	88,691	1.4%	38.4	1.3%	NM	NM	SQURPHARMA	179,950	5.6%	68.4	7.7x	1.3x
Mutual Fund	613	621	-7.47	-1.20%	37	28,181	0.4%	114.9	3.8%	NM	0.5x	BATBC	149,850	4.6%	44.0	9.1x	2.8x
General Insurance	2,380	2,387	-7.28	-0.30%	43	67,875	1.1%	175.6	5.8%	11.4x	1.0x	ROBI	125,187	3.9%	14.3	17.3x	1.8x
Life Insurance	1,541	1,574	-33.27	-2.11%	15	40,978	0.6%	66.0	2.2%	NM	NM	WALTONHIL	122,292	3.8%	4.0	9.5x	1.1x
Telecommunication	4,533	4,581	-47.37	-1.03%	3	531,590	8.2%	29.1	1.0%	14.1x	3.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,721	2,738	-17.03	-0.62%	34	515,836	8.0%	407.6	13.3%	11.9x	1.4x	BRACBANK	98,750	3.1%	76.0	7.3x	1.2x
Fuel & Power	1,056	1,062	-6.93	-0.65%	23	279,606	4.3%	300.5	9.8%	17.6x	0.6x	BERGERPBL	82,548	2.6%	1.1	24.0x	5.7x
Cement	1,697	1,730	-32.55	-1.88%	7	80,874	1.3%	38.1	1.2%	19.4x	1.7x	MARICO	74,598	2.3%	9.0	12.6x	9.9x
Services & Real Estate	895	914	-18.65	-2.04%	9	49,225	0.8%	111.7	3.7%	22.6x	0.4x	UPGDCL	69,390	2.2%	2.0	6.0x	1.6x
Engineering	2,204	2,219	-15.06	-0.68%	42	248,600	3.9%	257.2	8.4%	11.4x	0.8x	ISLAMIBANK	53,935	1.7%	3.9	11.6x	0.7x
Food & Allied	13,985	14,177	-192.26	-1.36%	21	255,882	4.0%	498.6	16.3%	14.8x	4.1x	LHB	50,984	1.6%	25.6	14.2x	2.5x
IT	1,683	1,721	-38.52	-2.24%	11	22,194	0.3%	122.8	4.0%	18.7x	1.4x	UNILEVERCL	43,936	1.4%	0.5	75.6x	17.0x
Textile	987	1,000	-13.38	-1.34%	58	102,791	1.6%	254.0	8.3%	NM	0.7x	ICB	39,200	1.2%	7.9	NM	0.9x
Paper & Printing	3,897	3,986	-89.79	-2.25%	6	17,604	0.3%	77.7	2.5%	NM	0.8x	BXPBARMA	38,232	1.2%	16.6	6.0x	0.8x
Tannery	1,814	1,839	-25.23	-1.37%	6	20,209	0.3%	18.6	0.6%	62.1x	1.5x	DUTCHBANGL	37,701	1.2%	1.7	8.7x	0.7x
Jute	10,255	10,399	-144.21	-1.39%	3	2,257	0.0%	15.7	0.5%	NM	NM	EBL	36,225	1.1%	15.3	5.3x	0.7x
Ceramics	365	373	-8.12	-2.18%	5	16,363	0.3%	68.2	2.2%	NM	1.0x	PUBALIBANK	32,536	1.0%	0.5	4.1x	0.6x
Miscellaneous	4,145	4,123	+22.70	+0.55%	15	225,113	3.5%	107.4	3.5%	88.6x	1.8x	OLYMPIC	29,831	0.9%	5.4	16.1x	2.5x
Corporate Bond**	15,655	15,527	+127.15	+0.82%	16	34,286	0.5%	1.2	0.0%	NM	NM	CITYBANK	29,664	0.9%	49.3	2.9x	0.6x
Treasury Bond**	2,003	2,015	-12.04	-0.60%	234	3,208,005	49.7%	3.4	0.1%	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
CENTRALINS	30.0	+9.9%	7.4	17.2x	0.6x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	LOVELLO	95.8	+0.2%	205.9	43.2x	7.6x
ZAHEENSPIN	6.3	+8.6%	9.9	NM	2.4x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	BEACHHATCH	44.8	-3.0%	111.0	9.6x	2.7x
MONNOAGML	317.3	+6.9%	17.7	NM	2.8x	BEXIMCO	69,463	4.9%	NM	1.3x	AGNISYSL	27.8	-0.7%	83.2	20.9x	1.6x
MIRACLEIND	25.7	+5.8%	4.7	NM	1.4x	BATBC	50,233	3.6%	9.1x	2.8x	BPPL	15.5	+2.0%	82.1	67.4x	0.6x
SILCOPHL	15.3	+5.5%	55.8	34.0x	0.7x	WALTONHIL	46,773	3.3%	9.5x	1.1x	BRACBANK	49.6	-0.8%	76.0	7.3x	1.2x
PLFSL	2.1	+5.00%	0.7	NM	NM	BRACBANK	46,489	3.3%	7.3x	1.2x	BSC	89.3	-2.4%	69.2	4.5x	0.9x
EASTRNLUB	2,580.1	+5.0%	61.1	61.6x	13x	GP	44,708	3.2%	13.1x	5.4x	SQURPHARMA	203.0	+0.1%	68.4	7.7x	1.3x
FAMILYTEX	2.4	+4.3%	0.4	NM	0.2x	RENATA	32,968	2.3%	19.6x	1.6x	SEAPEARL	47.9	-1.2%	63.2	NM	2.9x
SONARBAINS	21.7	+3.8%	2.1	NM	1.0x	BXPBARMA	23,409	1.7%	6.0x	0.8x	EASTRNLUB	2,580.1	+5.0%	61.1	61.6x	13.4x
RENWICKJA	641.7	+3.7%	0.0	NM	NM	PUBALIBANK	22,905	1.6%	4.1x	0.6x	SILCOPHL	15.3	+5.5%	55.8	34.0x	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	2.9x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNIONCAP	4.0	-7.0%	0.8	NM	NM	LHB	20,953	1.5%	14.2x	2.5x	LOVELLO	97.5	86.3	10.0	277	24.58
NURANI	2.9	-6.5%	0.8	NM	0x	OLYMPIC	20,496	1.5%	16.1x	2.5x	MTB	9.9	9.9	1.0	2,000	19.80
ICBAMCL2ND	6.0	-6.3%	1.0	NM	1.0x	ALARABANK	18,282	1.3%	36.4x	0.8x	GEMINISEA	125.0	117.0	2.0	42	4.92
VAMLRBBF	5.7	-5.0%	0.7	NM	0.5x	BEACONPHAR	17,838	1.3%	27.9x	3.7x	NCCBANK	9.0	9.0	1.0	505	4.55
ALIF	5.8	-4.9%	1.2	20.7x	0.4x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	FINEFOODS	221.1	219.6	2.0	14	3.08
DACCADYE	16.8	-4.5%	2.1	NM	0.6x	ROBI	14,876	1.1%	17.3x	1.8x	JMISMDL	128.0	128.0	1.0	20	2.56
MLDYEING	8.9	-4.3%	13.4	38.7x	0.7x	UTTARABANK	13,699	1.0%	NM	0.6x	EBL	20.6	20.6	1.0	121	2.48
RSRMSTEEL	9.2	-4.2%	0.5	NM	0.2x	NBL	13,055	0.9%	NM	7.8x	KBPWBIL	125.0	117.0	2.0	19	2.35
BDWELDING	9.5	-4.0%	0.1	NM	0.8x	BSRMLTD	12,852	0.9%	4.3x	0.5x	CLICL	49.8	49.0	4.0	43	2.14
TITASGAS	19.3	-4.0%	3.4	NM	0.2x	* 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					ABB1STMF	4.7	4.7	1.0	314	1.48

* 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	97.5	86.3	24.6	277	10	
MTB	9.9	9.9	19.8	2,000	1	
GEMINISEA	125.0	117.0	4.9	42	2	
NCCBANK	9.0	9.0	4.5	505	1	
FINEFOODS	221.1	219.6	3.1	14	2	
JMISMDL	128.0	128.0	2.6	20	1	
EBL	20.6	20.6	2.5	121	1	
KBPPWBIL	125.0	117.0	2.3	19	2	
CLICL	49.8	49.0	2.1	43	4	
ABB1STMF	4.7	4.7	1.5	314	1	
MONNOFABR	14.0	14.0	1.4	100	1	
SALVOCHEM	20.0	20.0	1.4	68	1	
APOLOISPAT	3.4	3.4	1.4	400	1	
ORIONINFU	347.6	347.6	1.3	4	1	
MJLBD	99.8	99.8	1.2	12	1	
NBL	3.7	3.7	1.1	300	2	
ASIATICLAB	38.0	38.0	1.1	29	2	
LANKABAFIN	16.0	16.0	0.8	50	1	
OIMEX	26.0	26.0	0.8	30	1	
CAPITECGBF	7.5	7.5	0.8	100	1	
RELIANCE1	18.4	18.4	0.7	40	1	
AIBL1STIMF	6.7	6.7	0.7	100	1	
Total			83.2		44	

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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