

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.47%) lost 22.41 points and closed at 4,754.41. The blue-chip index DS30 (-0.29%), the Shariah-based index DSES (-0.47%), and the large-cap index CDSET (-0.22%) closed at 1,782.20, 1,037.70, and 978.42 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.84% followed by Fuel & Power (-0.77%), Food & Allied (-0.77%), Engineering (-0.54%), Pharmaceutical (-0.53%), Bank (-0.12%), and Telecommunication (+0.71%), respectively. Block trades contributed 5.4% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-0.3%) was the most traded share with a turnover of BDT 148 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,754.41	4,776.83	-22.41	-0.47%	-8.9%
DS30	1,782.20	1,787.45	-5.24	-0.29%	-8.1%
DSES	1,037.70	1,042.64	-4.95	-0.47%	-11.2%
CDSET	978.42	980.60	-2.18	-0.22%	-8.2%

	Advanced	Declined	Unchanged	Total
All Category	71	258	69	398
A Category (Equity)	42	144	34	220
B Category (Equity)	18	58	7	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	11	56	28	95
Mutual Funds	5	13	18	36
Corporate Bonds	0	2	0	2
Treasury Bonds	2	2	0	4

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,507,435	6,514,061	-0.1%
	Mn USD	53,001	53,055	
Turnover	Mn BDT	3,050	3,278	-7.0%
	Mn USD	25	27	
Volume	Mn Shares	117	125	-6.8%
	No. of Trade	114,792	111,400	+3.0%

\* Average Interbank Exchange Rate is BDT 122.78 as of Jun 19, 2025

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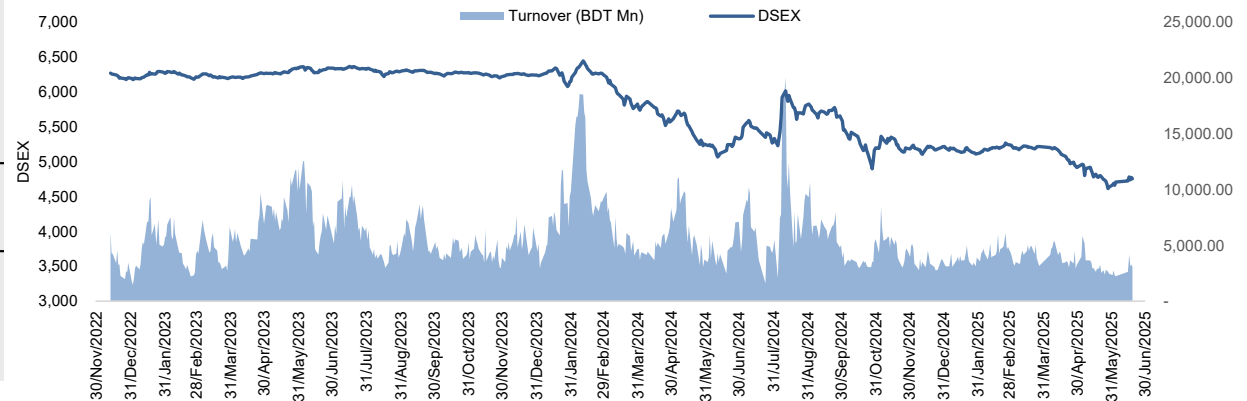


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

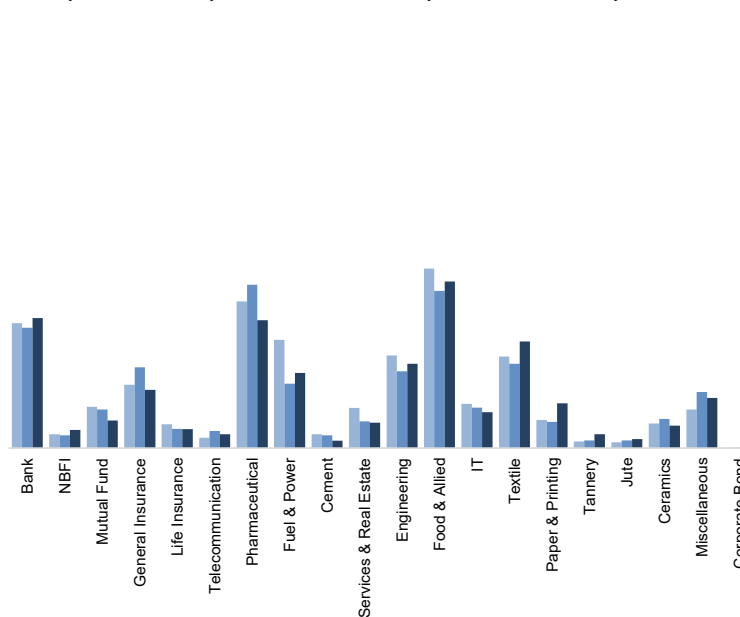
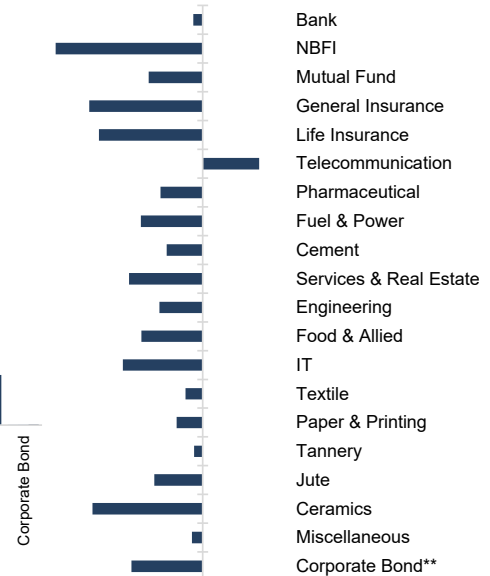


Figure: Sectorial Mcap Change

-2% -1% 0% 1%



Market PE 12.9x

Market PB 1.1x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, 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	1,300	1,302	-1.52	-0.12%	36	615,253	9.5%	361.2	12.5%	17.8x	0.6x	GP	397,258	12.2%	19.8	13.6x	5.6x
NBFI	917	934	-17.21	-1.84%	23	87,407	1.4%	50.5	1.7%	NM	NM	SQURPHARMA	181,722	5.6%	59.3	7.7x	1.3x
Mutual Fund	607	611	-4.13	-0.68%	37	27,891	0.4%	76.2	2.6%	NM	0.5x	BATBC	153,306	4.7%	48.9	9.3x	2.9x
General Insurance	2,407	2,442	-34.74	-1.42%	43	68,648	1.1%	161.5	5.6%	11.5x	1.0x	ROBI	127,282	3.9%	17.7	17.6x	1.8x
Life Insurance	1,533	1,553	-20.18	-1.30%	15	40,774	0.6%	52.5	1.8%	NM	NM	WALTONHIL	122,807	3.8%	1.9	9.5x	1.1x
Telecommunication	4,661	4,629	+32.72	+0.71%	3	546,592	8.4%	38.6	1.3%	14.5x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,726	2,741	-14.51	-0.53%	34	516,861	8.0%	355.3	12.3%	11.9x	1.4x	BRACBANK	99,944	3.1%	117.3	7.4x	1.2x
Fuel & Power	1,053	1,061	-8.20	-0.77%	23	278,925	4.3%	208.9	7.2%	17.6x	0.6x	BERGERPBL	82,126	2.5%	5.5	23.9x	5.7x
Cement	1,727	1,735	-7.84	-0.45%	7	82,313	1.3%	20.8	0.7%	19.7x	1.8x	MARICO	74,620	2.3%	16.1	12.6x	9.9x
Services & Real Estate	888	896	-8.27	-0.92%	9	48,813	0.8%	70.6	2.4%	22.5x	0.4x	UPGDCL	69,390	2.1%	1.6	6.0x	1.6x
Engineering	2,206	2,218	-12.04	-0.54%	42	248,893	3.8%	233.9	8.1%	11.4x	0.8x	ISLAMIBANK	54,096	1.7%	3.4	11.6x	0.7x
Food & Allied	14,246	14,357	-110.16	-0.77%	21	260,670	4.0%	462.6	16.0%	15.1x	4.1x	LHB	52,378	1.6%	14.3	14.6x	2.6x
IT	1,663	1,680	-16.81	-1.00%	11	21,936	0.3%	99.7	3.5%	18.5x	1.4x	UNILEVERCL	44,458	1.4%	0.2	76.5x	17.2x
Textile	988	990	-2.15	-0.22%	58	102,889	1.6%	295.9	10.3%	NM	0.7x	ICB	38,420	1.2%	8.0	NM	0.9x
Paper & Printing	3,904	3,917	-12.78	-0.33%	6	17,639	0.3%	124.4	4.3%	NM	0.8x	DUTCHBANGL	37,701	1.2%	0.9	8.7x	0.7x
Tannery	1,840	1,842	-1.96	-0.11%	6	20,505	0.3%	38.7	1.3%	63.0x	1.5x	BXPBARMA	37,340	1.1%	25.5	5.8x	0.8x
Jute	10,594	10,659	-64.59	-0.61%	3	2,332	0.0%	25.2	0.9%	NM	NM	EBL	36,225	1.1%	24.5	5.3x	0.7x
Ceramics	363	368	-5.08	-1.38%	5	16,291	0.3%	62.2	2.2%	NM	1.0x	PUBALIBANK	32,796	1.0%	0.8	4.2x	0.6x
Miscellaneous	4,140	4,146	-5.57	-0.13%	15	224,821	3.5%	139.1	4.8%	88.5x	1.8x	OLYMPIC	29,991	0.9%	4.3	16.2x	2.5x
Corporate Bond**	15,521	15,660	-139.94	-0.89%	16	33,993	0.5%	1.6	0.1%	NM	NM	CITYBANK	29,664	0.9%	29.8	2.9x	0.6x
Treasury Bond**	2,002	2,000	+2.38	+0.12%	234	3,208,231	49.6%	5.5	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
DSHGARME	91.7	+10.0%	22.9	NM	5.0x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	LOVELLO	101.7	-0.3%	147.8	45.8x	8.1x
STYLECRAFT	57.5	+9.9%	17.4	NM	9.9x	ISLAMIBANK	74,730	5.3%	11.6x	0.7x	BEACHHATCH	45.8	-0.4%	133.5	9.8x	2.8x
RENWICKJA	665.9	+5.7%	0.3	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	50.2	+1.0%	117.3	7.4x	1.2x
AL-HAJTEX	123.6	+5.5%	19.2	NM	14.6x	BATBC	50,233	3.6%	9.3x	2.9x	ASIATICLAB	36.4	-4.0%	87.0	15.1x	0.7x
LEGACYFOOT	49.8	+4.8%	22.0	NM	4.5x	WALTONHIL	46,773	3.3%	9.5x	1.1x	KBPWBIL	117.7	+0.9%	77.9	NM	9.8x
RAHIMTEXT	108.7	+4.82%	1.6	90.6x	4.3x	BRACBANK	46,489	3.3%	7.4x	1.2x	AGNISYSL	27.4	-2.8%	67.1	20.6x	1.6x
MLDYEING	9.2	+3.4%	19.3	40.0x	1x	GP	44,708	3.2%	13.6x	5.6x	EASTRNLAB	2,483.2	-4.1%	62.4	59.2x	12.9x
REGENTTEX	3.2	+3.2%	0.0	NM	0.1x	RENATA	32,968	2.3%	19.9x	1.6x	FINEFOODS	229.6	+1.5%	59.3	51.8x	15.7x
GIB	3.2	+3.2%	1.4	6.1x	NM	BXPBARMA	23,409	1.7%	5.8x	0.8x	SQURPHARMA	205.0	-0.1%	59.3	7.7x	1.3x
BDTHAI	12.9	+3.2%	37.0	NM	0.5x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	MAGURAPLEX	80.1	+2.0%	57.9	23.4x	1.1x
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)
SHYAMPSUG	116.4	-6.7%	0.9	NM	NM	LHB	20,953	1.5%	14.6x	2.6x	LOVELLO	97.9	91.9	10.0	501	47.07
ANLIMAYARN	20.1	-6.5%	0.6	NM	3x	OLYMPIC	20,496	1.5%	16.2x	2.5x	RENATA	489.0	489.0	1.0	50	24.45
SILCOPHL	14.4	-5.9%	14.8	32.0x	0.6x	ALARABANK	18,282	1.3%	36.2x	0.8x	MARICO	2,350.0	2,350.0	2.0	6	13.70
EBLNRBMF	3.5	-5.4%	1.8	NM	0.4x	BEACONPHAR	17,838	1.3%	28.0x	3.7x	TECHNODRUG	30.9	30.5	2.0	400	12.34
JUTESPINN	202.1	-5.3%	0.0	NM	NM	PRIMEBANK	16,142	1.1%	3.1x	0.6x	CVOPRL	134.0	134.0	1.0	56	7.52
PLFSL	1.9	-5.0%	0.1	NM	NM	ROBI	14,876	1.1%	17.6x	1.8x	CLICL	55.5	49.5	3.0	119	6.49
GLOBALINS	27.6	-4.8%	24.0	19.9x	1.9x	UTTARABANK	13,699	1.0%	NM	0.6x	RELANCE1	18.1	17.0	4.0	343	5.97
SHURWID	6.3	-4.5%	0.5	NM	0.5x	NBL	13,055	0.9%	NM	8.0x	BARKAPOWER	11.6	11.5	2.0	450	5.20
ISLAMIINS	36.2	-4.5%	1.5	10.4x	1.5x	BSRMLTD	12,852	0.9%	4.2x	0.5x	MIDLANDBNK	24.0	24.0	1.0	200	4.80
SALAMCRST	20.1	-4.3%	27.4	NM	1.1x	* NIBFI 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										

\* 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
LOVELLO	97.9	91.9	47.1	501	10
RENATA	489.0	489.0	24.5	50	1
MARICO	2,350.0	2,350.0	13.7	6	2
TECHNODRUG	30.9	30.5	12.3	400	2
CVOPRL	134.0	134.0	7.5	56	1
CLICL	55.5	49.5	6.5	119	3
RELIANCE1	18.1	17.0	6.0	343	4
BARKAPOWER	11.6	11.5	5.2	450	2
MIDLANDBNK	24.0	24.0	4.8	200	1
AMANFEED	24.4	24.1	4.0	164	2
DBH	33.8	33.8	3.4	100	1
BPPL	16.4	16.4	2.5	150	1
AL-HAJTEX	118.0	116.5	2.5	21	3
SEMILLECMF	11.4	11.0	2.4	214	2
JAMUNABANK	18.7	18.7	2.2	118	1
LHB	49.7	49.7	1.9	38	1
ASIATICLAB	36.0	36.0	1.8	50	1
KDSALTD	44.6	40.2	1.8	42	2
BDAUTOCA	90.2	90.2	1.6	18	1
MAGURAPLEX	78.9	78.9	1.6	20	1
REPUBLIC	27.4	27.4	1.5	54	1
PRIMEINSUR	24.5	24.5	1.4	56	1
<b>Total</b>			<b>165.3</b>		<b>58</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MERCANBANK		0.0%	0.0%	Record Date	29-Jun-25
UCB		0.0%	0.0%	Record Date	29-Jun-25
DELTALIFE		0.0%	30.0%	Record Date	30-Jun-25
PREMIERBAN		0.0%	0.0%	Record Date	3-Jul-25

**Important DSE News**
**BATBC**

The Board of Directors of the company has decided to change the registered Office address of the Company from New DOHS Road, Mohakhali, Dhaka-1206 to the following address effective from July 01, 2025: British American Tobacco Bangladesh Company Limited, Dehora, Dhamsona, Balibhadra Bazar, Ashulia, Dhaka-1349. The Board also approved the closure of Dhaka Factory Operations effective from July 01, 2025.

**MIRAKHTER**

Refer to their earlier news disseminated by DSE on 22.12.2024 regarding Issuance of Preference Shares, the Bangladesh Securities and Exchange Commission (BSEC) has informed the company that the Commission is not in a position to accord consent to the company for raising of capital of Tk. 2,500 million only through issuance of redeemable, cumulative, non-convertible, non-participative, preference shares. □

**RENATA**

The company has informed that the Board of Directors, in its 231st meeting held on November 23, 2024 decided to issue Non-Cumulative, Non-Participative, Redeemable or Fully Convertible Preference Shares at the Issuer's discretion, amounting up to BDT 3,250 million. This proposal was duly approved by the shareholders at the Extra Ordinary General Meeting (EGM) held on 12th January 2025. In line with the EGM approval, the Issuer at its discretion through the board meeting held on 18th June 2025 has decided to revise the structure in following manner: Previous Structure: Non-Cumulative, Non-Participative, Redeemable or Fully Convertible Preference Shares at Issuer's discretion. Revised Structure: Non-Cumulative, Non-Participative, Fully Convertible Preference Shares. This revision is subject to approval from the Bangladesh Securities and Exchange Commission (BSEC).

**MTB**

Associated Builders Corporation Ltd., a corporate sponsor of the Company, has informed that it has completed its sale of 20,00,000 shares of the company whereas Mr. Rashed Ahmed Chowdhury, a Director of the company, has informed that he has completed his buying of 20,00,000 shares of the company at prevailing market price as per declaration disseminated by DSE on 17.06.2025.

**NORTHRNINS**

The company has informed that Mr. Biddut Kumar Samadder CAP has been charged as Company Secretary of the company.

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