

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.62%) lost 76.81 points and closed at 4,677.60. The blue-chip index DS30 (-1.35%), the Shariah-based index DSES (-2.03%), and the large-cap index CDSET (-1.19%) closed at 1,758.21, 1,016.65, and 966.77 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 3.17% followed by Food & Allied (-2.30%), Engineering (-2.29%), Telecommunication (-1.62%), Fuel & Power (-1.51%), Pharmaceutical (-1.22%), and Bank (-1.13%), respectively. Block trades contributed 8.8% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-1.5%) was the most traded share with a turnover of BDT 196 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,677.60	4,754.41	-76.81	-1.62%	-10.3%
DS30	1,758.21	1,782.20	-23.99	-1.35%	-9.4%
DSES	1,016.65	1,037.70	-21.04	-2.03%	-13.0%
CDSET	966.77	978.42	-11.65	-1.19%	-9.3%

	Advanced	Declined	Unchanged	Total
All Category	16	365	16	397
A Category (Equity)	8	198	11	217
B Category (Equity)	4	78	1	83
N Category (Equity)	0	0	1	1
Z Category (Equity)	4	89	3	96
Mutual Funds	0	29	7	36
Corporate Bonds	0	1	1	2
Treasury Bonds	1	1	0	2

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,490,851	6,507,435	-0.3%
	Mn USD	52,889	53,024	
Turnover	Mn BDT	2,717	3,050	-10.9%
	Mn USD	22	25	
Volume	Mn Shares	119	117	+2.0%
No. of Trade		106,701	114,792	-7.0%

\* Average Interbank Exchange Rate is BDT 122.73 as of Jun 22, 2025

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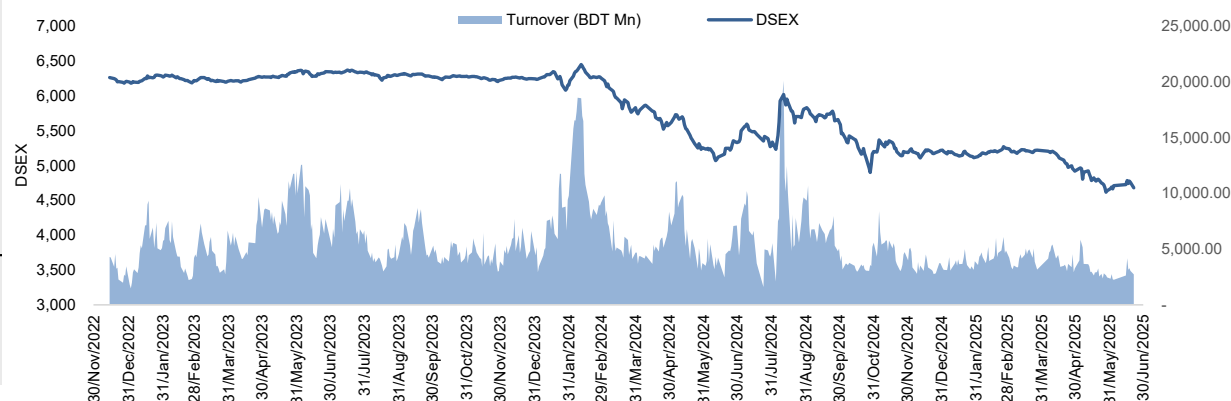


Figure: Sectorial Turnover (BDT Mn)

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

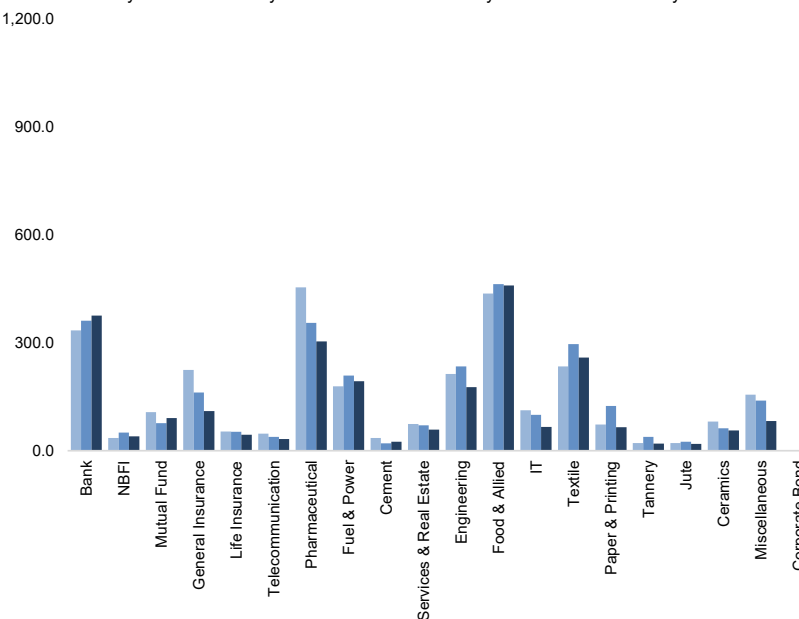


Figure: Sectorial Mcap Change

-6% -4% -2% 0%



Market PE 12.7x

Market PB 1.0x

\* 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	1,286	1,300	-14.67	-1.13%	36	608,310	9.4%	375.3	15.1%	17.6x	0.6x	GP	391,587	12.3%	11.4	13.4x	5.5x
NBFI	888	917	-29.11	-3.17%	23	84,633	1.3%	40.1	1.6%	NM	NM	SQURPHARMA	180,659	5.7%	65.7	7.7x	1.3x
Mutual Fund	592	607	-15.29	-2.52%	37	27,189	0.4%	90.6	3.7%	NM	0.5x	BATBC	148,770	4.7%	39.3	9.0x	2.8x
General Insurance	2,341	2,405	-64.41	-2.68%	43	66,809	1.0%	110.4	4.5%	11.1x	1.0x	ROBI	124,139	3.9%	19.9	17.2x	1.8x
Life Insurance	1,501	1,533	-31.99	-2.09%	15	39,924	0.6%	44.5	1.8%	NM	NM	WALTONHIL	120,232	3.8%	4.0	9.3x	1.0x
Telecommunication	4,586	4,661	-75.65	-1.62%	3	537,722	8.3%	32.5	1.3%	14.2x	3.4x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,693	2,726	-33.25	-1.22%	34	510,558	7.9%	303.3	12.2%	11.8x	1.4x	BRACBANK	99,745	3.1%	84.3	7.3x	1.2x
Fuel & Power	1,037	1,053	-15.90	-1.51%	23	274,714	4.2%	192.8	7.8%	17.3x	0.6x	BERGERPBL	81,718	2.6%	7.4	23.8x	5.6x
Cement	1,709	1,727	-18.45	-1.07%	7	81,434	1.3%	24.9	1.0%	19.5x	1.8x	MARICO	74,699	2.3%	2.2	12.6x	9.9x
Services & Real Estate	867	888	-20.69	-2.33%	9	47,675	0.7%	58.5	2.4%	21.9x	0.4x	UPGDCL	68,462	2.1%	2.7	5.9x	1.6x
Engineering	2,156	2,206	-50.48	-2.29%	42	243,198	3.7%	176.9	7.1%	11.2x	0.7x	ISLAMIBANK	53,452	1.7%	4.7	11.4x	0.7x
Food & Allied	13,918	14,246	-327.99	-2.30%	21	254,669	3.9%	458.9	18.5%	14.7x	4.0x	LHB	52,030	1.6%	17.9	14.5x	2.6x
IT	1,627	1,663	-35.97	-2.16%	11	21,462	0.3%	66.3	2.7%	18.1x	1.4x	UNILEVERCL	44,314	1.4%	0.1	76.2x	17.2x
Textile	963	988	-25.27	-2.56%	58	100,258	1.5%	258.4	10.4%	NM	0.7x	DUTCHBANGL	37,315	1.2%	0.7	8.6x	0.7x
Paper & Printing	3,752	3,904	-151.96	-3.89%	6	16,952	0.3%	65.4	2.6%	NM	0.8x	ICB	37,119	1.2%	4.2	NM	0.9x
Tannery	1,818	1,840	-21.91	-1.19%	6	20,261	0.3%	19.9	0.8%	62.3x	1.5x	BXPHARMA	36,492	1.1%	16.3	5.7x	0.7x
Jute	10,338	10,594	-256.14	-2.42%	3	2,276	0.0%	19.2	0.8%	NM	NM	EBL	36,065	1.1%	33.2	5.3x	0.7x
Ceramics	352	363	-11.26	-3.10%	5	15,786	0.2%	56.1	2.3%	NM	1.0x	PUBALIBANK	32,536	1.0%	0.7	4.1x	0.6x
Miscellaneous	4,116	4,140	-24.27	-0.59%	15	223,503	3.4%	82.5	3.3%	88.0x	1.8x	CITYBANK	29,664	0.9%	41.2	2.9x	0.6x
Corporate Bond**	15,496	15,521	-24.66	-0.16%	16	33,939	0.5%	0.1	0.0%	NM	NM	OLYMPIC	29,291	0.9%	3.7	15.8x	2.4x
Treasury Bond**	2,047	2,002	+44.30	+2.21%	235	3,278,853	50.5%	1.7	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
STYLECRAFT	60.3	+4.9%	30.7	NM	10.4x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	LOVELLO	100.2	-1.5%	196.2	45.2x	7.9x
RAHIMAFOD	75.4	+3.7%	10.3	NM	8.2x	ISLAMIBANK	74,730	5.3%	11.4x	0.7x	BEACHHATCH	44.1	-3.7%	95.7	9.4x	2.7x
STANDBANKL	5.8	+3.6%	10.2	7.8x	0.3x	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	50.1	-0.2%	84.3	7.3x	1.2x
LEGACYFOOT	51.3	+3.0%	8.6	NM	4.7x	BATBC	50,233	3.6%	9.0x	2.8x	SQURPHARMA	203.8	-0.6%	65.7	7.7x	1.3x
PIONEERINS	37.2	+2.2%	3.8	8.0x	0.8x	WALTONHIL	46,773	3.3%	9.3x	1.0x	FINEFOODS	232.8	+1.4%	61.1	52.5x	16.0x
FINEFOODS	232.8	+1.39%	61.1	52.5x	16.0x	BRACBANK	46,489	3.3%	7.3x	1.2x	UTTARABANK	20.8	-2.3%	51.8	NM	0.6x
DSHGARME	92.8	+1.2%	18.5	NM	5x	GP	44,708	3.2%	13.4x	5.5x	ASIATICLAB	36.1	-0.8%	43.3	14.9x	0.7x
ATLASBANG	53.8	+1.1%	0.2	NM	0.5x	RENATA	32,968	2.3%	19.6x	1.6x	CITYBANK	19.5	-	41.2	2.9x	0.6x
PRIMETEX	11.5	+0.9%	0.2	NM	0.2x	BXPHARMA	23,409	1.7%	5.7x	0.7x	ORIONINFU	303.8	-3.2%	40.2	NM	19.3x
ARAMITCEM	11.9	+0.8%	0.2	NM	NM	PUBALIBANK	22,905	1.6%	4.1x	0.6x	BATBC	275.5	-3.0%	39.3	9.0x	2.8x
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)
PRIMEFIN	3.6	-10.0%	0.8	NM	0.5x	LHB	20,953	1.5%	14.5x	2.6x	LOVELLO	99.0	92.0	14.0	1,036	98.27
FAREASTFIN	3.8	-9.5%	0.9	NM	NM	OLYMPIC	20,496	1.5%	15.8x	2.4x	NCCBANK	8.8	8.8	1.0	5,026	44.23
PADMALIFE	18.1	-9.5%	0.4	NM	NM	ALARABANK	18,282	1.3%	34.5x	0.8x	FINEFOODS	230.0	215.0	9.0	190	43.03
BAYLEASING	3.9	-9.3%	2.1	NM	1.1x	BEACONPHAR	17,838	1.3%	27.1x	3.6x	TECHNODRUG	30.1	30.1	2.0	250	7.53
KPPL	15.6	-8.2%	8.7	NM	NM	PRIMEBANK	16,142	1.1%	3.1x	0.6x	QUASEMIND	27.9	27.9	6.0	257	7.16
ISLAMICFIN	6.8	-8.1%	2.2	NM	1.6x	ROBI	14,876	1.1%	17.2x	1.8x	EASTRNLUB	2,550.0	2,535.0	3.0	3	6.37
BDFINANCE	7.0	-7.9%	1.3	NM	NM	UTTARABANK	13,699	1.0%	NM	0.6x	CITYGENINS	41.8	41.8	2.0	130	5.43
AFCAGRO	7.3	-7.6%	1.2	NM	0.4x	NBL	13,055	0.9%	NM	7.8x	SEAPPEARL	48.1	47.7	5.0	90	4.33
CVOPRL	124.0	-7.3%	22.0	46.3x	10.4x	BSRMLTD	12,852	0.9%	4.2x	0.4x	SEMLLECMF	11.0	11.0	4.0	300	3.30
GSPFINANCE	4.0	-7.0%	0.9	NM	0.3x	* 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										
											PADMALIFE	20.5	20.5	1.0	114	2.34

\* 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	99.0	92.0	98.3	1,036	14
NCCBANK	8.8	8.8	44.2	5,026	1
FINEFOODS	230.0	215.0	43.0	190	9
TECHNODRUG	30.1	30.1	7.5	250	2
QUASEMIND	27.9	27.9	7.2	257	6
EASTRNLUB	2,550.0	2,535.0	6.4	3	3
CITYGENINS	41.8	41.8	5.4	130	2
SEAPEARL	48.1	47.7	4.3	90	5
SEMLLECMF	11.0	11.0	3.3	300	4
PADMALIFE	20.5	20.5	2.3	114	1
EIL	46.2	46.2	2.0	43	1
EBLNRBMF	3.2	3.2	1.9	600	1
CENTRALINS	34.5	34.5	1.9	55	1
MIDLANDBNK	26.4	26.4	1.6	60	1
SIMTEX	15.9	15.2	1.5	98	3
ABB1STMF	4.6	4.6	1.4	300	1
IFIC	5.6	5.6	1.1	200	1
SUNLIFEINS	60.8	60.8	1.1	18	1
SAPORTL	21.7	21.7	0.9	40	1
AIL	45.1	45.1	0.8	19	1
SIBL	7.7	7.7	0.8	100	1
BEACHHATCH	49.9	49.9	0.7	13	1
<b>Total</b>			<b>238.9</b>		<b>63</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
AB BANK		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**
**UCB**

The company has informed that the Board of Directors of the company has approved issuance of UCB Sixth Subordinated Bond of Tk. 1,000 crore in its meeting held on June 19, 2025 subject to approval of concerned regulatory authorities.

**NCCBANK**

Newaz International Ltd. (where Mr. Alhaj Md. Nurun Newaz is the Managing Director and also the Sponsor Director of National Credit and Commerce Bank PLC.) has completed the buying of 2,17,08,000 shares of National Credit and Commerce Bank PLC. at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated by DSE on 06.05.2025.

**GPHISPAT**

Refer to their earlier news disseminated by DSE on 08.10.2024 regarding Board decision to issue Preference Shares up to BDT 5,000 million, the Bangladesh Securities and Exchange Commission (BSEC) vide their letter dated June 19, 2025 has informed the company that the Commission is not in a position to accord consent to the company for raising of capital of BDT 5,000 million through issuance of non-convertible, cumulative, redeemable, non-participative, preference shares.

**ASIAINS**

The Board of Directors has recommended 10% cash for the year ended December 31, 2024. Date of AGM: 26.08.2025, Time: 12:00 PM. Venue: Digital Platform. Record Date: 29.07.2025. The Company has also reported EPS of Tk. 2.06, NAV per share of Tk. 29.63 and NOCFPS of Tk. 3.47 for the year ended December 31, 2024 as against Tk. 2.02, Tk. 27.40 and Tk. 2.70 respectively for the year ended December 31, 2023.

**(Q1 Un-audited):** EPS was Tk. 0.40 for January-March 2025 as against Tk. 0.37 for January-March 2024. NOCFPS was Tk. 0.39 for January-March 2025 as against Tk. 0.04 for January-March 2024. NAV per share was Tk. 29.87 as on March 31, 2025 and Tk. 29.63 as on December 31, 2024.

**MEGHNALIFE**

The Company has informed that the Board of Directors has appointed Mr. Enamul Haque Khan as the Company Secretary of the company with effect from 04.05.2025.

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