

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.37%) gained 17.43 points and closed at 4,695.03. The blue-chip index DS30 (+0.28%), the Shariah-based index DSES (+0.72%), and the large-cap index CDSET (+0.20%) closed at 1,763.13, 1,023.95, and 968.73 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 1.44% followed by Engineering (+1.18%), NBFI (+0.30%), Pharmaceutical (+0.30%), Bank (+0.11%), Fuel & Power (+0.00%), and Food & Allied (-0.25%), respectively. Block trades contributed 9.3% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+4.6%) was the most traded share with a turnover of BDT 205 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,695.03	4,677.60	+17.43	+0.37%	-10.0%
DS30	1,763.13	1,758.21	+4.92	+0.28%	-9.1%
DSES	1,023.95	1,016.65	+7.30	+0.72%	-12.4%
CDSET	968.73	966.77	+1.96	+0.20%	-9.1%

	Advanced	Declined	Unchanged	Total
All Category	220	104	77	401
A Category (Equity)	126	57	37	220
B Category (Equity)	59	8	17	84
N Category (Equity)	1	0	0	1
Z Category (Equity)	34	39	23	96
Mutual Funds	9	9	18	36
Corporate Bonds	1	2	0	3
Treasury Bonds	4	0	0	4

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,521,486	6,490,851	+0.5%
	Mn USD	53,144	52,895	
Turnover	Mn BDT	2,765	2,717	+1.8%
	Mn USD	23	22	
Volume	Mn Shares	123	119	+3.7%
No. of Trade		101,290	106,701	-5.1%

\* Average Interbank Exchange Rate is BDT 122.71 as of Jun 23, 2025

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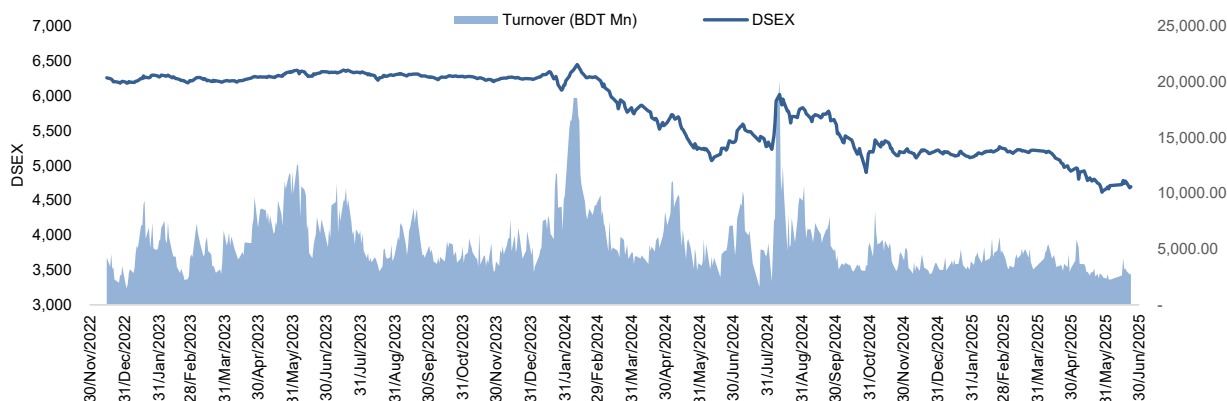


Figure: Sectorial Turnover (BDT Mn)

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

1,200.0

900.0

600.0

300.0

0.0

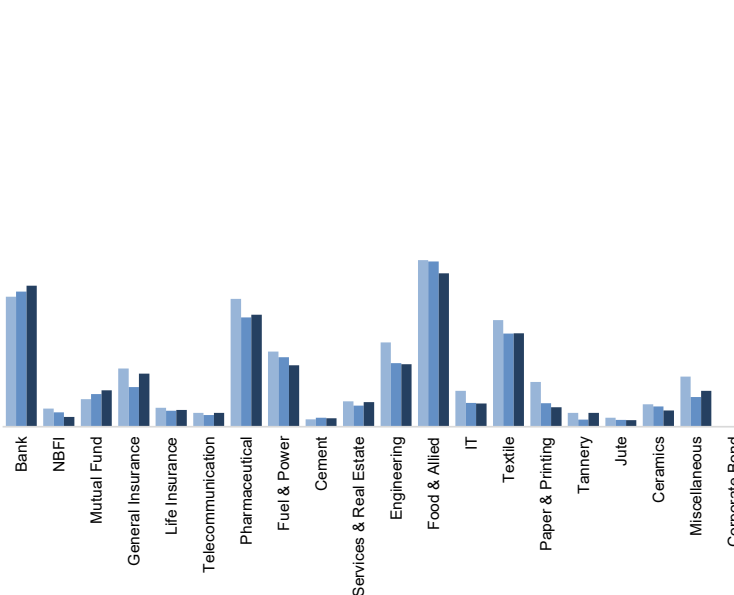
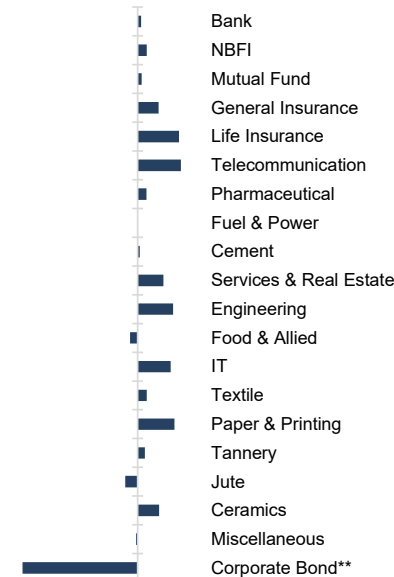


Figure: Sectorial Mcap Change

-6% -4% -2% 0% 2%



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	1,287	1,286	+1.47	+0.11%	36	609,005	9.4%	391.7	15.6%	17.7x	0.6x	GP	399,014	12.4%	18.7	13.6x	5.6x
NBFI	891	888	+2.68	+0.30%	23	84,888	1.3%	27.1	1.1%	NM	NM	SQURPHARMA	180,747	5.6%	88.1	7.7x	1.3x
Mutual Fund	592	592	+0.76	+0.13%	37	27,224	0.4%	101.1	4.0%	NM	0.5x	BATBC	146,826	4.6%	50.4	8.9x	2.8x
General Insurance	2,357	2,341	+16.35	+0.70%	43	67,276	1.0%	147.3	5.9%	11.2x	1.0x	ROBI	124,663	3.9%	19.0	17.2x	1.8x
Life Insurance	1,522	1,501	+20.78	+1.38%	15	40,476	0.6%	46.7	1.9%	NM	NM	WALTONHIL	121,898	3.8%	4.3	9.4x	1.1x
Telecommunication	4,652	4,586	+66.21	+1.44%	3	545,485	8.4%	38.6	1.5%	14.4x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,701	2,693	+8.02	+0.30%	34	512,079	7.9%	311.2	12.4%	11.8x	1.4x	BRACBANK	99,745	3.1%	83.0	7.3x	1.2x
Fuel & Power	1,037	1,037	+0.03	+0.00%	23	274,722	4.2%	170.2	6.8%	17.3x	0.6x	BERGERPBL	81,518	2.5%	7.6	23.7x	5.6x
Cement	1,710	1,709	+1.13	+0.07%	7	81,488	1.3%	23.5	0.9%	19.5x	1.8x	MARICO	74,655	2.3%	3.1	12.6x	9.9x
Services & Real Estate	874	867	+7.50	+0.86%	9	48,087	0.7%	68.5	2.7%	22.1x	0.4x	UPGDCL	67,998	2.1%	1.2	5.8x	1.6x
Engineering	2,181	2,156	+25.49	+1.18%	42	246,073	3.8%	173.8	6.9%	11.3x	0.7x	ISLAMIBANK	53,291	1.7%	2.3	11.4x	0.7x
Food & Allied	13,884	13,918	-34.62	-0.25%	21	254,035	3.9%	426.1	17.0%	14.7x	4.0x	LHB	52,146	1.6%	15.4	14.5x	2.6x
IT	1,645	1,627	+18.02	+1.11%	11	21,699	0.3%	64.6	2.6%	18.3x	1.4x	UNILEVERCL	44,433	1.4%	0.6	76.4x	17.2x
Textile	966	963	+2.93	+0.30%	58	100,564	1.6%	259.7	10.4%	NM	0.7x	DUTCHBANGL	37,605	1.2%	1.9	8.7x	0.7x
Paper & Printing	3,798	3,752	+46.13	+1.23%	6	17,161	0.3%	53.9	2.1%	NM	0.8x	ICB	37,466	1.2%	4.4	NM	0.9x
Tannery	1,823	1,818	+4.30	+0.24%	6	20,309	0.3%	38.6	1.5%	62.4x	1.5x	BXPHARMA	36,403	1.1%	9.9	5.7x	0.7x
Jute	10,295	10,338	-42.43	-0.41%	3	2,266	0.0%	18.1	0.7%	NM	NM	EBL	36,065	1.1%	28.4	5.3x	0.7x
Ceramics	354	352	+2.53	+0.72%	5	15,900	0.2%	45.5	1.8%	NM	1.0x	PUBALIBANK	32,666	1.0%	1.9	4.2x	0.6x
Miscellaneous	4,114	4,116	-2.28	-0.06%	15	223,379	3.4%	99.4	4.0%	87.9x	1.8x	OLYMPIC	29,631	0.9%	1.8	16.0x	2.5x
Corporate Bond**	14,900	15,496	-595.83	-3.85%	16	32,895	0.5%	0.3	0.0%	NM	NM	CITYBANK	29,512	0.9%	37.5	2.9x	0.6x
Treasury Bond**	2,032	2,047	-14.23	-0.70%	235	3,255,584	50.2%	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
RAHIMAFOOD	82.9	+9.9%	22.3	NM	9.0x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	LOVELLO	104.8	+4.6%	205.1	47.2x	8.3x
DSHGARME	102.0	+9.9%	17.6	NM	5.5x	ISLAMIBANK	74,730	5.3%	11.4x	0.7x	MIDLANDBNK	24.4	+6.6%	120.1	19.2x	1.6x
IBP	10.0	+9.9%	30.2	NM	0.7x	BEXIMCO	69,463	4.9%	NM	1.3x	SQURPHARMA	203.9	+0.0%	88.1	7.7x	1.3x
CENTRALINS	35.0	+9.4%	57.0	20.1x	0.7x	BATBC	50,233	3.6%	8.9x	2.8x	BRACBANK	50.1	-	83.0	7.3x	1.2x
PHENIXINS	24.8	+8.3%	0.2	17.5x	0.7x	WALTONHIL	46,773	3.3%	9.4x	1.1x	BEACHHATCH	45.1	+2.3%	69.3	9.6x	2.7x
RAHIMTEXT	111.7	+8.03%	1.6	93.1x	4.4x	BRACBANK	46,489	3.3%	7.3x	1.2x	CENTRALINS	35.0	+9.4%	57.0	20.1x	0.7x
SAFKOSPINN	9.6	+7.9%	1.0	NM	NM	GP	44,708	3.2%	13.6x	5.6x	KBPPWBIL	113.7	-0.4%	52.5	NM	9.5x
YPL	11.3	+7.6%	1.0	NM	2.1x	RENATA	32,968	2.3%	19.6x	1.6x	BATBC	271.9	-1.3%	50.4	8.9x	2.8x
NLTUBES	78.2	+6.7%	21.2	40.7x	0.6x	BXPHARMA	23,409	1.7%	5.7x	0.7x	SEAPEARL	49.5	+3.8%	47.7	NM	3.0x
MIDLANDBNK	24.4	+6.6%	120.1	19.2x	1.6x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	SONARGAON	38.2	+6.1%	46.8	NM	2.0x
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)
REGENTTEX	2.9	-6.5%	0.1	NM	0.1x	LHB	20,953	1.5%	14.5x	2.6x	LOVELLO	107.0	91.2	20.0	824	82.15
FIRSTFIN	3.0	-6.3%	0.3	NM	NM	OLYMPIC	20,496	1.5%	16.0x	2.5x	FINEFOODS	230.0	217.0	3.0	108	24.76
RENWICKJA	603.0	-5.5%	0.4	NM	NM	ALARABANK	18,282	1.3%	34.7x	0.8x	EIL	51.3	46.2	5.0	496	23.38
PDL	5.2	-5.5%	3.5	NM	0.4x	BEACONPHAR	17,838	1.3%	27.5x	3.7x	POPULAR1MF	3.4	3.4	1.0	6,864	23.34
FAREASTFIN	3.6	-5.3%	0.7	NM	NM	PRIMEBANK	16,142	1.1%	3.1x	0.6x	BEXIMCO	99.1	99.1	1.0	166	16.42
PLFSL	1.8	-5.3%	0.2	NM	NM	ROBI	14,876	1.1%	17.2x	1.8x	IFIC1STMF	3.6	3.6	1.0	4,440	15.99
ZAHINTEX	4.0	-4.8%	0.3	NM	0.5x	UTTARABANK	13,699	1.0%	NM	0.6x	CENTRALINS	33.7	30.0	9.0	415	13.11
MEGCONMILK	17.0	-4.5%	0.8	NM	NM	NBL	13,055	0.9%	NM	7.6x	TRUSTB1MF	3.6	3.6	1.0	2,932	10.56
OAL	6.6	-4.3%	1.2	NM	0.7x	BSRMLTD	12,852	0.9%	4.2x	0.5x	SHEPHERD	17.0	16.7	7.0	627	10.54
FAMILYTEX	2.2	-4.3%	0.8	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										

\* 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	107.0	91.2	82.1	824	20
FINEFOODS	230.0	217.0	24.8	108	3
EIL	51.3	46.2	23.4	496	5
POPULAR1MF	3.4	3.4	23.3	6,864	1
BEXIMCO	99.1	99.1	16.4	166	1
IFIC1STMF	3.6	3.6	16.0	4,440	1
CENTRALINS	33.7	30.0	13.1	415	9
TRUSTB1MF	3.6	3.6	10.6	2,932	1
SHEPHERD	17.0	16.7	10.5	627	7
PRIMEBANK	21.8	21.8	5.6	257	1
CLICL	55.9	55.8	5.5	99	2
EBLNRBMF	3.2	3.2	4.3	1,354	1
SONALILIFE	51.1	51.1	4.1	81	2
FBFIF	3.4	3.4	2.7	790	1
SEAPEARL	52.4	52.4	2.6	50	1
AL-HAJTEX	118.0	117.0	2.3	20	2
PHPMF1	3.3	3.3	2.2	670	1
INTRACO	21.8	21.7	1.7	77	3
IFIC	5.5	5.5	1.4	262	1
MONNOCERA	83.5	83.5	1.4	17	1
ACI	176.0	176.0	1.1	6	1
ROBI	21.5	21.5	1.0	46	1
<b>Total</b>			<b>258.3</b>		<b>69</b>

#### Important DSE News

##### MERCANBANK

The company has informed that Board of Directors in its meeting held on June 22, 2025 has decided that the company will issue unsecured, non-convertible, fully redeemable, coupon bearing floating rate "Mercantile Bank 3rd Subordinated Bond" of BDT 800.00 crore to raise Tier-II regulatory capital for strengthening the Capital base of the company under BASEL-III guidelines subject to approval from concerned regulatory authorities.

##### EASTRNLUB

The company has informed that mr. A h m nurul islam (retired secretary to govt. Of bangladesh) has been appointed as chairman of the board of directors of the company in place of mr. Md. Rezanur rahman, with effect from 18-06-2025.

##### ROBI

The company has informed that the board of directors has approved the appointment of mr. Ziad shatara as the managing director and chief executive officer of the company with effect from september 01, 2025.

#### 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

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