

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.48%) gained 22.63 points and closed at 4,717.66. The blue-chip index DS30 (+0.48%), the Shariah-based index DSES (+0.69%), and the large-cap index CDSET (+0.28%) closed at 1,771.52, 1,031.02, and 971.47 points, respectively. All of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.39% followed by Pharmaceutical (+0.79%), Fuel & Power (+0.47%), Engineering (+0.46%), Telecommunication (+0.35%), Food & Allied (+0.20%), and Bank (+0.05%), respectively. Block trades contributed 9.7% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+3.5%) was the most traded share with a turnover of BDT 354 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,717.66	4,695.03	+22.63	+0.48%	-9.6%
DS30	1,771.52	1,763.13	+8.39	+0.48%	-8.7%
DSES	1,031.02	1,023.95	+7.07	+0.69%	-11.8%
CDSET	971.47	968.73	+2.74	+0.28%	-8.9%

	Advanced	Declined	Unchanged	Total
All Category	236	92	73	401
A Category (Equity)	143	43	37	223
B Category (Equity)	47	22	13	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	46	27	23	96
Mutual Funds	20	5	11	36
Corporate Bonds	1	1	2	4
Treasury Bonds	3	3	0	6

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,541,686	6,521,486	+0.3%
	Mn USD	53,311	53,146	
Turnover	Mn BDT	3,727	2,765	+34.8%
	Mn USD	30	23	
Volume	Mn Shares	142	123	+14.7%
No. of Trade		116,813	101,290	+15.3%

* Average Interbank Exchange Rate is BDT 122.71 as of Jun 24, 2025

Fahim Hassan
Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Md Rakibul Hasan
Research Associate

(880) 1708805229

rakibul.hasan@bracepl.com

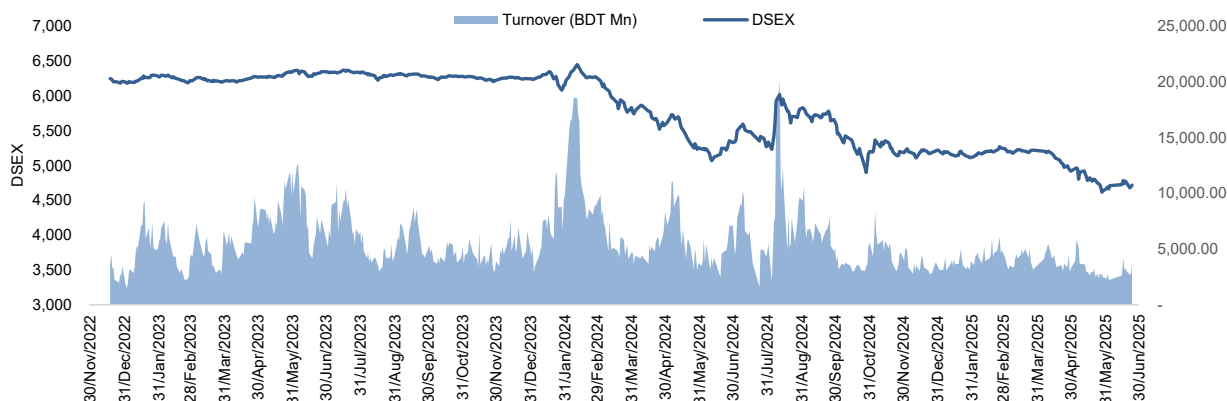


Figure: Sectorial Turnover (BDT Mn)

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

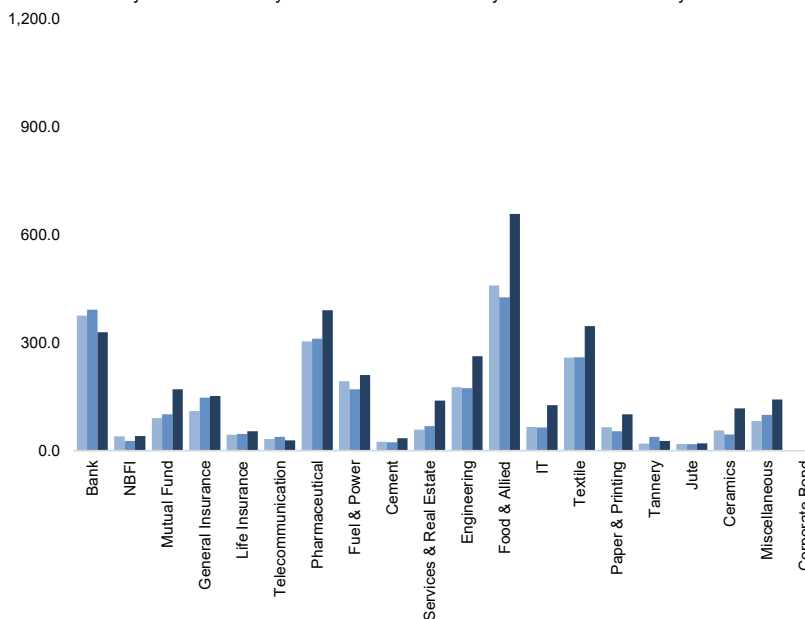
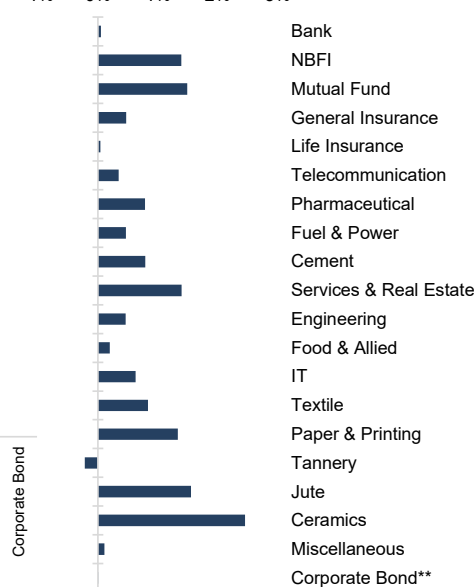


Figure: Sectorial Mcap Change

-1% 0% 1% 2% 3%



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	1,288	1,287	+0.64	+0.05%	36	609,307	9.4%	329.1	9.8%	17.7x	0.6x	GP	399,284	12.4%	13.7	13.6x	5.6x
NBFI	903	891	+12.40	+1.39%	23	86,070	1.3%	40.4	1.2%	NM	NM	SQURPHARMA	181,722	5.6%	107.4	7.7x	1.3x
Mutual Fund	601	592	+8.84	+1.49%	37	27,630	0.4%	170.8	5.1%	NM	0.5x	BATBC	146,934	4.6%	38.2	8.9x	2.8x
General Insurance	2,368	2,357	+11.10	+0.47%	43	67,593	1.0%	151.9	4.5%	11.3x	1.0x	ROBI	126,234	3.9%	13.3	17.5x	1.8x
Life Insurance	1,522	1,522	+0.62	+0.04%	15	40,493	0.6%	54.3	1.6%	NM	NM	WALTONHIL	122,020	3.8%	2.3	9.5x	1.1x
Telecommunication	4,668	4,652	+16.18	+0.35%	3	547,383	8.4%	28.5	0.8%	14.5x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,722	2,701	+21.25	+0.79%	34	516,108	7.9%	389.8	11.6%	11.9x	1.4x	BRACBANK	98,750	3.1%	70.0	7.3x	1.2x
Fuel & Power	1,042	1,037	+4.87	+0.47%	23	276,013	4.2%	210.2	6.2%	17.4x	0.6x	BERGERPBL	81,495	2.5%	14.1	23.7x	5.6x
Cement	1,723	1,710	+13.51	+0.79%	7	82,132	1.3%	35.0	1.0%	19.7x	1.8x	MARICO	74,450	2.3%	6.4	12.6x	9.9x
Services & Real Estate	887	874	+12.20	+1.40%	9	48,758	0.8%	139.1	4.1%	22.4x	0.4x	UPGDCL	68,462	2.1%	2.5	5.9x	1.6x
Engineering	2,191	2,181	+10.06	+0.46%	42	247,207	3.8%	262.5	7.8%	11.4x	0.7x	ISLAMIBANK	53,452	1.7%	5.4	11.4x	0.7x
Food & Allied	13,912	13,884	+27.82	+0.20%	21	254,544	3.9%	657.6	19.5%	14.7x	4.0x	LHB	52,610	1.6%	20.0	14.7x	2.6x
IT	1,656	1,645	+10.33	+0.63%	11	21,836	0.3%	126.2	3.7%	18.4x	1.4x	UNILEVERCL	44,427	1.4%	0.6	76.4x	17.2x
Textile	974	966	+8.05	+0.83%	58	101,402	1.6%	346.3	10.3%	NM	0.7x	ICB	38,766	1.2%	10.5	NM	0.9x
Paper & Printing	3,849	3,798	+50.75	+1.34%	6	17,390	0.3%	101.2	3.0%	NM	0.8x	DUTCHBANGL	37,508	1.2%	1.0	8.6x	0.7x
Tannery	1,819	1,823	-4.04	-0.22%	6	20,264	0.3%	27.3	0.8%	62.3x	1.5x	BXPHARMA	37,161	1.2%	28.8	5.8x	0.7x
Jute	10,455	10,295	+159.91	+1.55%	3	2,301	0.0%	20.2	0.6%	NM	NM	EBL	36,065	1.1%	33.3	5.3x	0.7x
Ceramics	363	354	+8.71	+2.46%	5	16,290	0.3%	117.4	3.5%	NM	1.0x	PUBALIBANK	32,536	1.0%	2.6	4.1x	0.6x
Miscellaneous	4,118	4,114	+4.48	+0.11%	15	223,622	3.4%	142.2	4.2%	88.0x	1.8x	CITYBANK	29,664	0.9%	50.3	2.9x	0.6x
Corporate Bond**	14,900	14,900	+0.09	+0.00%	16	32,896	0.5%	0.4	0.0%	NM	NM	OLYMPIC	29,511	0.9%	6.7	16.0x	2.4x
Treasury Bond**	2,036	2,032	+3.53	+0.17%	235	3,261,448	50.2%	16.1	0.5%	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
IBP	11.0	+10.0%	15.4	NM	0.8x	SQURPHARMA	108,958	7.7%	7.7x	1.3x	LOVELLO	108.5	+3.5%	353.8	48.9x	8.6x
YPL	12.4	+9.7%	8.3	NM	2.3x	ISLAMIBANK	74,730	5.3%	11.4x	0.7x	BEACHHATCH	45.1	-	110.6	9.6x	2.7x
SAFKOSPINN	10.5	+9.4%	2.7	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	SQURPHARMA	205.0	+0.5%	107.4	7.7x	1.3x
ALLTEX	9.6	+7.9%	0.4	NM	0.5x	BATBC	50,233	3.6%	8.9x	2.8x	SEAPEARL	52.1	+5.3%	101.7	NM	3.1x
MONNOCERA	83.7	+6.9%	66.0	98.5x	1.0x	WALTONHIL	46,773	3.3%	9.5x	1.1x	AGNISYSL	27.3	+0.4%	92.9	20.5x	1.6x
ANWARGALV	60.5	+6.70%	30.7	NM	30.3x	BRACBANK	46,489	3.3%	7.3x	1.2x	KBPPWBIL	114.3	+0.5%	75.2	NM	9.6x
KPPL	16.9	+6.3%	5.7	NM	NM	GP	44,708	3.2%	13.6x	5.6x	BRACBANK	49.6	-1.0%	70.0	7.3x	1.2x
FBFIF	3.5	+6.1%	4.7	NM	0.4x	RENATA	32,968	2.3%	19.9x	1.6x	MONNOCERA	83.7	+6.9%	66.0	98.5x	1.0x
SEAPEARL	52.1	+5.3%	101.7	NM	3.1x	BXPHARMA	23,409	1.7%	5.8x	0.7x	RELIANCE1	17.2	-1.7%	63.7	NM	1.6x
NEWLINE	6.2	+5.1%	3.1	NM	0.3x	PUBALIBANK	22,905	1.6%	4.1x	0.6x	FINEFOODS	232.9	-0.0%	57.7	52.5x	16.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	OLYMPIC	ALARABANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
GSPFINANCE	3.6	-7.7%	1.4	NM	0.3x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	LOVELLO	107.0	97.0	26.0	2,004	198.14
FIRSTFIN	2.8	-6.7%	0.5	NM	NM	15.5%	16.0x	13.3%	1.3%	1.1%	1.1%	1.0%	0.9%	0.9%	FINEFOODS	230.0	225.0	5.0	62	14.04
PHENIXINS	23.4	-5.6%	0.4	16.5x	0.7x	14.7x	2.4x	34.5x	28.2x	3.1x	17.5x	NM	NM	NM	UTTARABANK	22.7	21.0	2.0	615	13.78
ZAHEENSPIN	6.6	-4.3%	14.4	NM	2.5x	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	GP	297.0	296.3	2.0	43	12.69
STYLECRAFT	61.2	-3.9%	28.8	NM	10.6x	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	CITYGENINS	44.3	44.0	3.0	238	10.50
GENNEXT	2.5	-3.8%	4.3	NM	0.2x	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	AL-HAJTEX	123.7	118.0	5.0	83	10.17
SUNLIFEINS	60.0	-3.5%	14.4	NM	NM	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	RENATA	480.0	480.0	2.0	20	9.36
MEGCONMILK	16.4	-3.5%	0.8	NM	NM	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	MERCANBANK	7.0	7.0	2.0	1,070	7.49
UNIONBANK	2.8	-3.4%	0.9	7.6x	0.2x	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	QUASEMIND	33.2	33.2	3.0	216	7.17
ILFSL	2.8	-3.4%	0.2	NM	NM	2.6x	2.4x	0.8x	3.8x	0.6x	1.8x	0.6x	7.6x	0.5x	FBFIF	3.5	3.5	1.0	1,750	6.13

* 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	97.0	198.1	2,004	26
FINEFOODS	230.0	225.0	14.0	62	5
UTTARABANK	22.7	21.0	13.8	615	2
GP	297.0	296.3	12.7	43	2
CITYGENINS	44.3	44.0	10.5	238	3
AL-HAJTEX	123.7	118.0	10.2	83	5
RENATA	480.0	480.0	9.4	20	2
MERCANBANK	7.0	7.0	7.5	1,070	2
QUASEMIND	33.2	33.2	7.2	216	3
FBFIF	3.5	3.5	6.1	1,750	1
AIL	46.9	39.1	6.0	140	2
BXPHERMA	82.3	82.3	4.6	56	1
RELIANCE1	17.5	17.0	3.9	229	2
TECHNODRUG	29.8	29.8	3.7	124	1
PRIMEBANK	24.0	24.0	3.7	154	1
ADNTEL	68.3	68.3	3.7	54	1
JANATAINS	24.7	24.7	3.5	141	1
BANKASIA	14.8	14.8	3.2	215	1
SHAHJABANK	16.1	16.1	2.8	176	1
JAMUNABANK	18.8	18.8	2.4	128	1
AMANFEED	23.4	23.4	2.2	94	1
KBPPWBIL	125.0	102.5	2.2	20	2
Total			360.5		99

Important DSE News

DHAKABANK

Mr. Mohammed Hanif, one of the Sponsor Directors of the company, passed away on 14.12.2024. The company has informed that his holding of 30,000,000 shares (out of his total holding of 31,800,000 shares) will be transmitted to the account of his nominee Mr. Asif Hanif who is son of Late Mohammed Hanif.

Referring to their earlier news disseminated by DSE on 18.06.2025, the company has further informed that they have not yet received consent from BSEC against declaration of 5% Stock Dividend for the year ended December 31, 2024. As such, the Record Date as on 25.06.2025 shall be applicable for entitlement of 5% Cash Dividend. Another 'Record Date' for entitlement of 5% Stock Dividend shall be declared upon receipt of Consent from BSE

CLICL

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Chartered Life Insurance PLC.' instead of 'Chartered Life Insurance Company Limited' with effect from today, i.e., June 24, 2025. Other information (except name) will remain unchanged.

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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