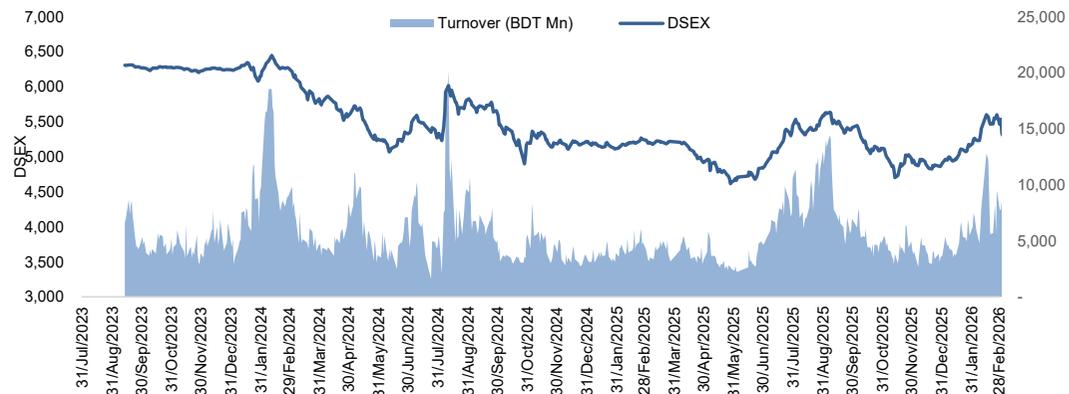


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.29%) lost 68.96 points and closed at 5,284.97. The blue-chip index DS30 (-1.92%), the Shariah-based index DSES (-0.74%), and the large-cap index CDSET (-1.79%) closed at 2,011.46, 1,072.61, and 1,085.27 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 2.45% followed by Telecommunication (-2.45%), NBF1 (-1.88%), Food & Allied (-1.18%), Fuel & Power (-1.14%), Pharmaceutical (-0.69%), and Engineering (-0.43%), respectively. Block trades contributed 3.1% of the overall market turnover. ACME Pesticides Limited (+7.0%) was the most traded share with a turnover of BDT 184 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,284.97	5,353.94	-68.96	-1.29%	+8.6%
DS30	2,011.46	2,050.78	-39.33	-1.92%	+8.5%
DSES	1,072.61	1,080.56	-7.95	-0.74%	+7.2%
CDSET	1,085.27	1,105.08	-19.81	-1.79%	+8.0%

	Advanced	Declined	Unchanged	Total
All Category	121	243	27	391
A Category (Equity)	69	122	12	203
B Category (Equity)	22	50	8	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	30	71	7	108
Mutual Funds	34	0	0	34
Corporate Bonds	1	2	0	3
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,974,555	7,065,382	-1.3%
	Mn USD	57,014	57,757	
Turnover	Mn BDT	4,925	4,603	
	Mn USD	40	38	+7.0%
Volume	Mn Shares	279	260	+7.5%
No. of Trade		160,457	141,342	+13.5%

* Average Interbank Exchange Rate is BDT 122.33 as of Mar 24, 2026

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Figure: Sectorial Turnover (BDT Mn)

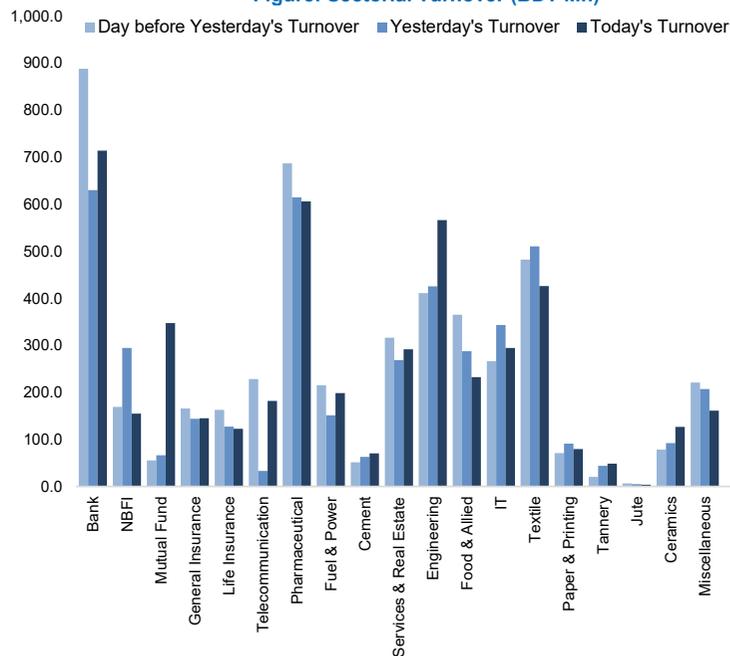
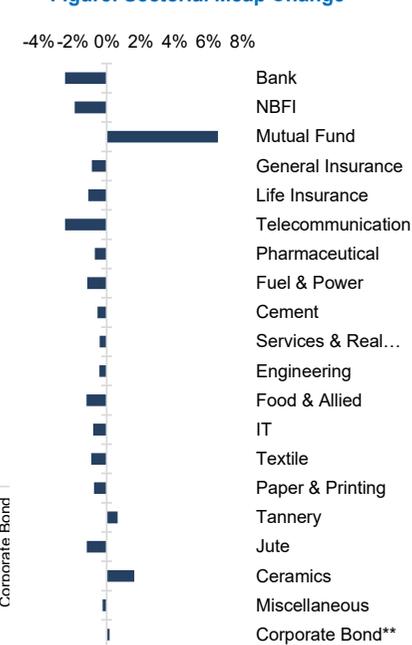


Figure: Sectorial Mcap Change



Market PE 15.4x
Market PB 1.6x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, selected NBFIs and Banks

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	1,562	1,601	-39.24	-2.45%	36	738,914	10.6%	713.5	15.0%	10.2x	0.8x	GP	339,060	9.8%	23.9	11.5x	6.1x
NBFI	1,010	1,030	-19.39	-1.88%	23	96,043	1.4%	155.0	3.2%	NM	1.0x	SQURPHARMA	190,232	5.5%	66.3	7.3x	1.3x
Mutual Fund	534	502	+32.84	+6.55%	36	25,608	0.4%	347.2	7.3%	NM	0.5x	ROBI	157,662	4.6%	156.6	16.8x	2.3x
General Insurance	3,038	3,065	-26.78	-0.87%	43	86,712	1.2%	145.2	3.0%	14.0x	1.3x	BRACBANK	140,758	4.1%	170.8	9.0x	1.4x
Life Insurance	1,829	1,849	-19.85	-1.07%	15	48,652	0.7%	122.9	2.6%	NM	NM	WALTONHIL	127,191	3.7%	13.4	11.4x	1.1x
Telecommunication	4,462	4,573	-111.90	-2.45%	3	523,151	7.5%	181.7	3.8%	12.6x	3.6x	BATBC	121,932	3.5%	18.4	20.9x	2.2x
Pharmaceutical	2,977	2,998	-20.67	-0.69%	34	564,415	8.1%	605.5	12.7%	11.8x	1.5x	BEXIMCO	103,850	3.0%	0.0	NM	1.3x
Fuel & Power	1,046	1,058	-12.10	-1.14%	23	277,412	4.0%	198.3	4.2%	9.4x	0.6x	MARICO	87,567	2.5%	3.1	13.9x	30.1x
Cement	1,982	1,993	-10.67	-0.54%	7	94,451	1.4%	70.1	1.5%	18.6x	2.1x	BERGERPBL	69,185	2.0%	2.9	20.8x	3.7x
Services & Real Estate	1,036	1,040	-4.20	-0.40%	9	56,961	0.8%	291.4	6.1%	20.2x	0.4x	UPGDCL	68,752	2.0%	4.8	6.4x	1.5x
Engineering	2,403	2,413	-10.41	-0.43%	42	271,030	3.9%	566.0	11.9%	15.2x	0.8x	LHB	61,553	1.8%	39.2	12.0x	3.2x
Food & Allied	12,432	12,580	-148.50	-1.18%	21	227,866	3.3%	232.4	4.9%	32.6x	3.5x	BXPBARMA	52,195	1.5%	15.2	8.2x	1.1x
IT	1,888	1,903	-15.02	-0.79%	11	24,982	0.4%	294.5	6.2%	27.9x	1.5x	RENATA	49,331	1.4%	10.2	19.5x	1.4x
Textile	1,139	1,149	-10.28	-0.89%	58	119,006	1.7%	426.0	8.9%	NM	0.8x	PUBALIBANK	48,023	1.4%	7.1	7.7x	0.6x
Paper & Printing	4,592	4,627	-34.59	-0.75%	6	21,265	0.3%	79.6	1.7%	NM	1.3x	CITYBANK	47,462	1.4%	136.7	3.6x	0.8x
Tannery	1,908	1,895	+12.20	+0.64%	6	22,083	0.3%	48.7	1.0%	NM	1.3x	EBL	43,087	1.2%	39.6	5.5x	0.9x
Jute	10,741	10,868	-126.42	-1.16%	3	2,364	0.0%	3.7	0.1%	NM	NM	UNILEVERCL	41,488	1.2%	2.4	52.2x	18.5x
Ceramics	409	403	+6.52	+1.62%	5	18,359	0.3%	126.6	2.7%	NM	1.2x	DUTCHBANGL	41,085	1.2%	2.6	8.3x	0.8x
Miscellaneous	3,924	3,933	-9.40	-0.24%	15	213,235	3.1%	161.0	3.4%	88.7x	1.7x	PRIMEBANK	34,818	1.0%	49.0	4.0x	0.8x
Corporate Bond**	17,140	17,109	+30.75	+0.18%	16	37,840	0.5%	0.1	0.0%	NM	NM	ICB	33,303	1.0%	2.8	NM	1.1x
Treasury Bond**	2,279	2,308	-28.75	-1.25%	232	3,508,368	50.3%	2.0	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
NCCBLMF1	4.4	+10.0%	1.6	NM	0.5x	SQURPHARMA	107,978	7.3%	7.3x	1.3x	ACMEPL	18.4	+7.0%	183.8	NM	1.1x
ABB1STMF	3.3	+10.0%	35.4	NM	0.4x	BRACBANK	83,808	5.6%	9.0x	1.4x	BRACBANK	70.7	-6.1%	170.8	9.0x	1.4x
LRGLOBMF1	3.3	+10.0%	3.4	NM	0.4x	ISLAMIBANK	69,909	4.7%	NM	0.9x	ROBI	30.1	-5.0%	156.6	16.8x	2.3x
IFIC1STMF	3.3	+10.0%	13.9	NM	0.4x	BEXIMCO	69,465	4.7%	NM	1.3x	CITYBANK	31.2	-1.9%	136.7	3.6x	0.8x
PF1STMF	5.5	+10.0%	20.4	NM	0.9x	WALTONHIL	42,462	2.9%	11.4x	1.1x	SEAPEARL	41.2	+1.7%	123.4	NM	2.9x
BDAUTOCA	161.0	+9.97%	32.7	NM	21.9x	BXPBARMA	37,466	2.5%	8.2x	1.1x	SAPORTL	49.6	+0.8%	120.6	21.8x	1.4x
RUNNERAUTO	37.5	+10.0%	80.3	24.5x	1x	PUBALIBANK	35,321	2.4%	7.7x	0.6x	INTECH	42.1	-1.2%	119.5	NM	NM
CNATEX	4.5	+9.8%	18.8	NM	NM	GP	34,298	2.3%	11.5x	6.1x	SPCERAMICS	22.3	+6.2%	107.9	NM	0.7x
SEMLFBSLGF	5.7	+9.6%	7.3	NM	0.5x	CITYBANK	33,789	2.3%	3.6x	0.8x	KBPPWBIL	49.2	-2.6%	94.1	87.9x	4.2x
GREENDELMF	3.5	+9.4%	4.7	NM	0.4x	BATBC	32,608	2.2%	20.9x	2.2x	DOMINAGE	39.3	+0.5%	82.8	NM	2.3x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)	
FAREASTFIN	3.4	-12.8%	3.9	NM	NM	RENATA	24,247	1.6%	19.5x	1.4x	ALARABANK	19.1	19.1	4.0	2,055	39.26	
PRIMEFIN	5.0	-9.1%	12.3	NM	1x	LHB	22,917	1.5%	12.0x	3.2x	GQBALLPEN	500.0	500.0	1.0	40	20.00	
BIFC	6.0	-8.6%	4.8	NM	NM	PRIMEBANK	22,766	1.5%	4.0x	0.8x	ASIATICLAB	69.0	67.0	3.0	230	15.60	
GSPFINANCE	5.3	-8.6%	4.8	NM	NM	OLYMPIC	20,155	1.4%	14.7x	2.3x	UTRARABANK	17,787	1.2%	NM	0.9x	292	14.23
BAYLEASING	5.4	-8.5%	6.4	NM	NM	ALARABANK	16,914	1.1%	44.9x	0.8x	ROBI	16,657	1.1%	16.8x	2.3x	27	12.28
PHOENIXFIN	4.5	-8.2%	4.4	NM	0.0x	NBL	14,501	1.0%	NM	NM	BEACONPHAR	14,379	1.0%	19.1x	3.2x	4.0	10.86
FASFIN	3.4	-8.1%	9.1	NM	NM						ACMEPL	17.2	16.7	2.0	610	10.20	
PLFSL	3.5	-7.9%	13.0	NM	NM						SHAHJABANK	16.6	16.6	1.0	581	9.64	
ILFSL	3.6	-7.7%	13.1	NM	NM						SIMTEX	25.0	23.4	2.0	345	8.15	
PREMIERLEA	3.6	-7.7%	5.3	NM	NM						LOVELLO	67.5	67.5	1.0	42	2.84	

* Bank and NBFI sector PE calculation methodology has been modified.
 ** 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
ALARABANK	19.1	19.1	39.3	2,055	4
GQBALLPEN	500.0	500.0	20.0	40	1
ASIATICLAB	69.0	67.0	15.6	230	3
SAPORTL	53.9	47.0	14.2	292	3
FINEFOODS	460.0	440.0	12.3	27	2
CENTRALINS	41.2	40.2	10.9	265	4
ACMEPL	17.2	16.7	10.2	610	2
SHAHJABANK	16.6	16.6	9.6	581	1
SIMTEX	25.0	23.4	8.1	345	2
LOVELLO	67.5	67.5	2.8	42	1
CLICL	57.5	57.5	1.8	31	1
BDAUTOCA	156.0	156.0	1.6	11	2
ROBI	34.8	34.7	1.2	36	2
CRYSTALINS	81.5	81.5	1.2	15	1
BANGAS	110.0	110.0	0.6	6	1
LHB	48.6	48.6	0.6	12	1
PUBALIBANK	40.8	40.8	0.6	14	1
AIL	30.7	30.7	0.6	18	1
ORIONINFU	365.0	365.0	0.5	2	1
ITC	34.6	34.6	0.5	15	1
NAHEEACP	23.2	23.2	0.5	22	1
RELIANCE1	12.0	12.0	0.5	42	1
Total			153.4		37

Important DSE News
IDLC

The Board of Directors has recommended 15% Cash and 5% Stock Dividend for the year ended December 31, 2025. Date of AGM: 14.05.2026; Time: 11:00 AM; Venue/ Mode: Digital Platform. Record Date: 19.04.2026. The Company has also reported Consolidated EPS of Tk. 5.58, Consolidated NAV per share of Tk. 49.96 and Consolidated NOCFPS of Tk. 53.38 for the year ended December 31, 2025, as against Tk. 4.59, Tk. 45.96 and Tk. 8.02 respectively for the year ended December 31, 2024.

GP

The company has informed that the ongoing geopolitical tensions in the Middle East that have led to significant disruption in global energy markets leaves Bangladesh particularly exposed due to its reliance on imported fuels and LNG. This has resulted in increased volatility in energy supplies, higher fuel import costs, and initial signs of constraints in energy supplies and logistics across the country. While the overall operating environment remains stable, these developments, which come on top of a weak macroeconomic environment, have started to impact economic activity and consumer behavior with early signs of pressure on mobility, business operations, and disposable income. Severe seasonal storms have further aggravated the situation. Against this backdrop, the company expects Q1 performance to be moderately impacted. Compared to the same period last year, revenue is anticipated to be approximately 2% lower, while EBITDA is expected to decline by around 3%.

RUNNERAUTO

The company has informed that the Board of Directors in its meeting held on March 20, 2026 has taken the following decisions and discussed the current business situation; The Board discussed and approved the signing of the MASTER SUPPLY AND MANUFACTURE (Agreement) between Runner Automobiles PLC and BYD Auto Industry Company Limited, (CIN:91440300791738553L), People's Republic of China, located at No.3001, 3007, Hengping Road, Pingshan, Shenzhen, P.R. China (the BYD).

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BATBC		0.0%	30.0%	Record Date	1-Apr-26
PIONEERINS		5.0%	25.0%	Record Date	5-Apr-26
UNILEVERCL		0.0%	420.0%	Record Date	6-Apr-26
LHB		0.0%	22.0%	Record Date	9-Apr-26
AGRANINS		0.0%	0.0%	Record Date	15-Apr-26
PARAMOUNT		0.0%	10.0%	Record Date	21-Apr-26

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