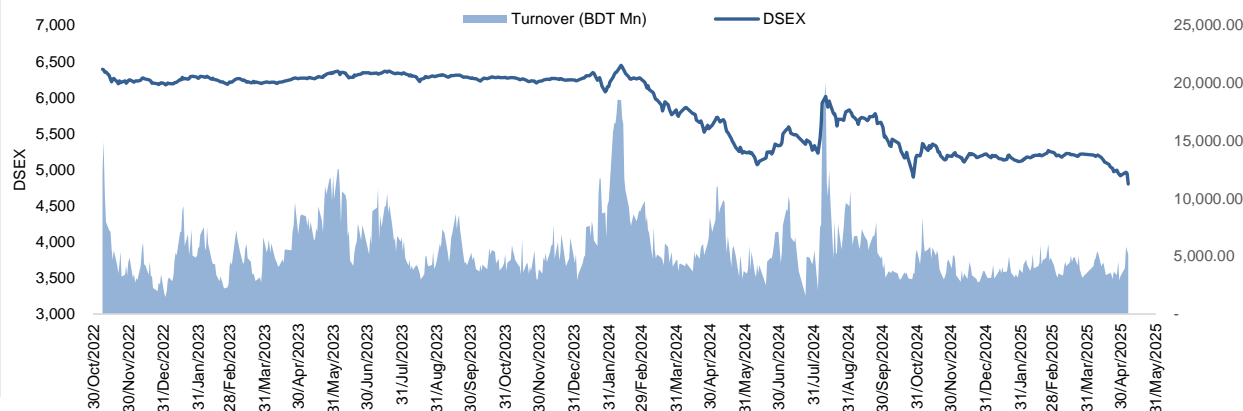


Daily Market Update

The market closed in red today. The benchmark index DSEX (-3.02%) lost 149.31 points and closed at 4,802.42. The blue-chip index DS30 (-2.20%), the Shariah-based index DSES (-3.85%), and the large-cap index CDSET (-1.84%) closed at 1,793.43, 1,047.99, and 993.31 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 4.87% followed by Engineering (-4.72%), Fuel & Power (-2.93%), Food & Allied (-2.44%), Pharmaceutical (-2.32%), Bank (-2.23%), and Telecommunication (-2.01%), respectively. Block trades contributed 2.1% of the overall market turnover. NRB Bank Limited (+4.8%) was the most traded share with a turnover of BDT 371 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,802.42	4,951.73	-149.31	-3.02%	-7.9%
DS30	1,793.43	1,833.77	-40.34	-2.20%	-7.5%
DSES	1,047.99	1,089.91	-41.92	-3.85%	-10.3%
CDSET	993.31	1,011.92	-18.61	-1.84%	-6.8%

	Advanced	Declined	Unchanged	Total
All Category	9	385	5	399
A Category (Equity)	1	215	3	219
B Category (Equity)	4	79	0	83
N Category (Equity)	0	0	1	1
Z Category (Equity)	4	91	1	96
Mutual Funds	0	36	0	36
Corporate Bonds	0	2	2	4
Treasury Bonds	0	2	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,443,393	6,544,061	-1.5%
	Mn USD	52,815	53,640	
Turnover	Mn BDT	5,165	5,497	-6.1%
	Mn USD	42	45	
Volume	Mn Shares	243	287	-15.3%
No. of Trade		167,277	156,021	+7.2%

* Average Interbank Exchange Rate is BDT 122.00 as of May 07, 2025

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Figure: Sectorial Turnover (BDT Mn)

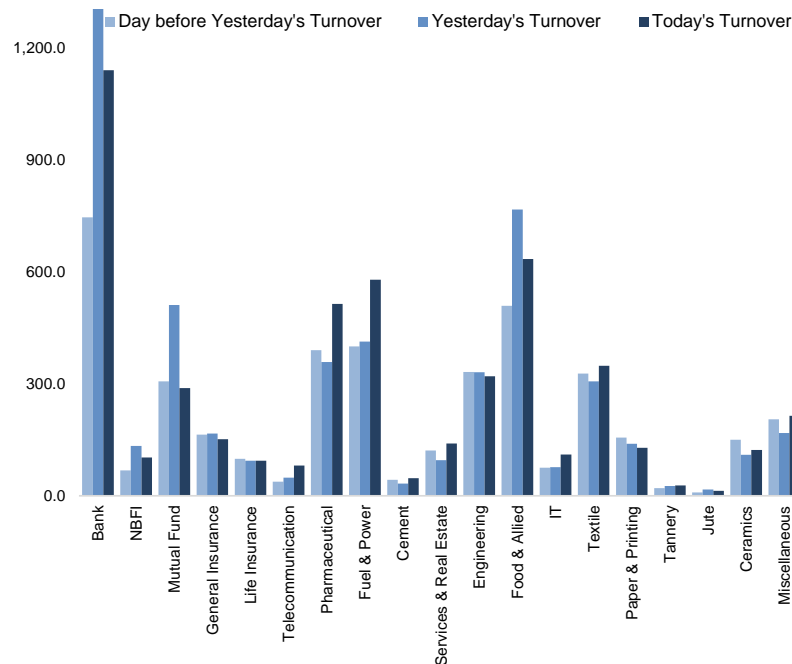
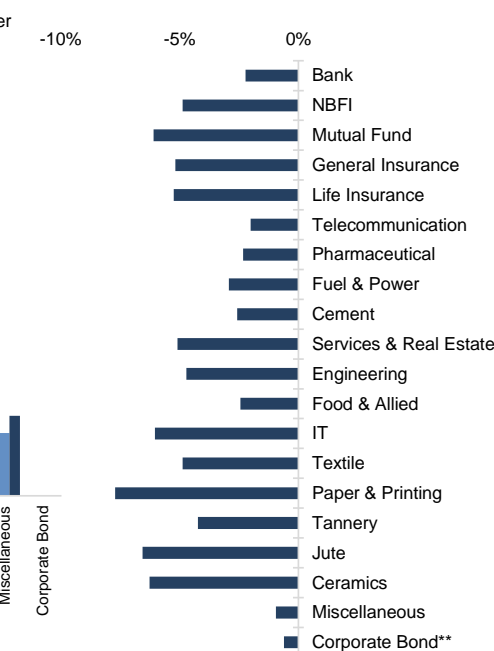


Figure: Sectorial Mcap Change



Market PE 14.7x

Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, 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	1,329	1,360	-30.30	-2.23%	36	628,952	9.8%	1,139.4	22.5%	7.0x	0.6x	GP	401,444	12.3%	32.6	13.7x	5.6x
NBFI	938	986	-48.00	-4.87%	23	89,404	1.4%	102.8	2.0%	NM	NM	SQURPHARMA	188,637	5.8%	77.0	8.0x	1.4x
Mutual Fund	624	665	-40.49	-6.09%	37	28,700	0.4%	288.5	5.7%	NM	0.6x	BATBC	165,672	5.1%	36.1	9.5x	2.9x
General Insurance	2,369	2,498	-129.29	-5.18%	43	67,615	1.0%	151.3	3.0%	11.7x	1.0x	ROBI	127,282	3.9%	41.5	18.1x	1.9x
Life Insurance	1,565	1,651	-86.55	-5.24%	15	41,614	0.6%	94.3	1.9%	NM	NM	WALTONHIL	122,171	3.7%	6.7	9.5x	1.1x
Telecommunication	4,704	4,800	-96.43	-2.01%	3	551,545	8.6%	81.0	1.6%	14.7x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,796	2,862	-66.42	-2.32%	34	529,971	8.2%	514.0	10.2%	12.2x	1.4x	BRACBANK	90,963	2.8%	145.8	7.4x	1.2x
Fuel & Power	1,033	1,064	-31.14	-2.93%	23	273,694	4.2%	578.3	11.4%	17.1x	0.6x	BERGERPBL	81,894	2.5%	0.4	23.9x	5.6x
Cement	1,709	1,754	-45.12	-2.57%	7	81,457	1.3%	46.9	0.9%	18.5x	1.8x	MARICO	80,331	2.5%	41.8	13.6x	10.7x
Services & Real Estate	897	945	-48.06	-5.08%	9	49,352	0.8%	140.2	2.8%	23.4x	0.4x	UPGDCL	66,201	2.0%	12.7	5.7x	1.6x
Engineering	2,181	2,289	-107.95	-4.72%	42	246,028	3.8%	319.8	6.3%	11.3x	0.7x	RENATA	54,928	1.7%	10.6	19.5x	1.6x
Food & Allied	14,598	14,963	-365.09	-2.44%	21	267,104	4.1%	633.7	12.5%	14.6x	3.9x	LHB	52,030	1.6%	23.0	13.6x	2.8x
IT	1,641	1,746	-105.44	-6.04%	11	21,642	0.3%	110.2	2.2%	18.2x	1.4x	UNILEVERCL	42,727	1.3%	1.1	73.5x	16.5x
Textile	978	1,028	-50.06	-4.87%	58	101,859	1.6%	348.1	6.9%	NM	0.7x	BXPHARMA	40,105	1.2%	87.6	6.3x	0.8x
Paper & Printing	3,767	4,082	-314.61	-7.71%	6	17,019	0.3%	128.2	2.5%	NM	0.8x	DUTCHBANGL	37,526	1.1%	2.5	8.6x	0.7x
Tannery	1,717	1,793	-75.73	-4.22%	6	19,136	0.3%	27.9	0.6%	NM	1.4x	ICB	37,466	1.1%	7.0	NM	0.9x
Jute	10,315	11,039	-723.91	-6.56%	3	2,271	0.0%	13.6	0.3%	NM	NM	EBL	33,193	1.0%	12.3	5.0x	0.8x
Ceramics	367	391	-24.49	-6.26%	5	16,444	0.3%	122.4	2.4%	NM	1.0x	PUBALIBANK	32,391	1.0%	17.7	4.2x	0.6x
Miscellaneous	4,125	4,164	-39.56	-0.95%	15	223,994	3.5%	213.8	4.2%	90.8x	1.8x	CITYBANK	30,830	0.9%	52.1	3.0x	0.7x
Corporate Bond**	15,125	15,217	-92.68	-0.61%	16	33,126	0.5%	0.6	0.0%	NM	NM	OLYMPIC	29,171	0.9%	10.2	15.8x	2.4x
Treasury Bond**	1,939	1,945	-6.38	-0.33%	236	3,151,981	48.9%	0.8	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
BPPL	14.8	+9.6%	187.1	64.3x	0.5x	SQURPHARMA	108,958	7.7%	8.0x	1.4x	NRRBANK	15.3	+4.8%	371.2	25.2x	1.2x
MIDLANDBNK	27.0	+5.5%	320.0	21.3x	1.8x	ISLAMIBANK	74,730	5.3%	12.2x	0.8x	BEACHHATCH	50.9	-9.9%	339.1	10.9x	3.1x
NRRBANK	15.3	+4.8%	371.2	25.2x	1.2x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	27.0	+5.5%	320.0	21.3x	1.8x
BARKAPOWER	12.7	+3.3%	88.1	60.5x	0.6x	BATBC	50,233	3.6%	9.5x	2.9x	BPPL	14.8	+9.6%	187.1	64.3x	0.5x
PROGRESLIF	53.9	+3.1%	10.5	NM	NM	WALTONHIL	46,773	3.3%	9.5x	1.1x	BRACBANK	51.4	-0.8%	145.8	7.4x	1.2x
ISNLTD	38.3	+2.41%	11.6	NM	13.9x	BRACBANK	46,489	3.3%	7.4x	1.2x	BSC	90.0	-4.1%	131.3	4.7x	0.9x
SEAPEARL	40.5	+1.3%	46.3	NM	2x	GP	44,708	3.2%	13.7x	5.6x	FINEFOODS	199.6	-1.6%	100.5	45.0x	13.7x
RENWICKJA	637.6	+1.0%	0.3	NM	NM	RENATA	32,968	2.3%	19.5x	1.6x	BARKAPOWER	12.7	+3.3%	88.1	60.5x	0.6x
SHYAMPSUG	139.5	+0.7%	4.4	NM	NM	BXPHARMA	23,409	1.7%	6.3x	0.8x	BXPHARMA	89.9	-3.1%	87.6	6.3x	0.8x
JAMUNABANK	19.0	-	23.7	6.0x	0.8x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	SPCERAMICS	20.6	-9.3%	81.4	NM	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.0x	0.7x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PRIMETEX	11.8	-9.9%	0.7	NM	0.2x	LHB	20,953	1.5%	13.6x	2.8x	MIDLANDBNK	25.4	24.0	11.0	1,494	36.89
BEACHHATCH	50.9	-9.9%	339.1	10.9x	3x	OLYMPIC	20,496	1.5%	15.8x	2.4x	KDSALTD	45.0	45.0	1.0	360	16.20
MIDASFIN	8.2	-9.9%	2.7	NM	2.2x	ALARABANK	18,282	1.3%	13.7x	1.0x	SEMLLECMF	14.3	14.3	2.0	700	10.01
SONARGAON	29.3	-9.8%	6.8	88.8x	1.5x	BEACONPHAR	17,838	1.3%	28.1x	3.8x	LOVELLO	80.0	76.6	4.0	127	9.92
GEMINISEA	109.9	-9.8%	10.6	NM	8.9x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	ABB1STMF	5.0	4.5	4.0	1,600	7.68
SALAMCRST	19.4	-9.8%	28.0	NM	1.1x	ROBI	14,876	1.1%	18.1x	1.9x	BEACHHATCH	62.0	50.9	5.0	86	4.80
MITHUNKNIT	14.8	-9.8%	5.6	NM	4.7x	UTTARABANK	13,699	1.0%	7.2x	0.7x	EIL	45.0	45.0	1.0	100	4.50
HRTEX	22.5	-9.6%	9.5	NM	7.6x	NBL	13,055	0.9%	NM	8.2x	NRRBANK	15.8	13.7	2.0	212	3.27
SHARPIND	16.0	-9.6%	7.0	25.0x	1.5x	BSRMLTD	12,852	0.9%	4.1x	0.4x	EASTRNLU	2,200.0	2,185.0	2.0	1	1.77
KPPL	17.0	-9.6%	21.2	NM	NM	* 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				GP	320.1	318.4	2.0	5	1.73	

* 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
MIDLANDBNK	25.4	24.0	36.9	1,494	11
KDSALTD	45.0	45.0	16.2	360	1
SEMLLECMF	14.3	14.3	10.0	700	2
LOVELLO	80.0	76.6	9.9	127	4
ABB1STMF	5.0	4.5	7.7	1,600	4
BEACHHATCH	62.0	50.9	4.8	86	5
EIL	45.0	45.0	4.5	100	1
NRBBANK	15.8	13.7	3.3	212	2
EASTRNLSB	2,200.0	2,185.0	1.8	1	2
GP	320.1	318.4	1.7	5	2
EBL	19.0	19.0	1.5	79	1
DUTCHBANGL	48.0	48.0	1.3	27	1
AMANFEED	24.3	24.3	1.2	50	1
PRAGATILIF	95.5	95.5	1.0	10	1
SUNLIFEINS	63.6	63.6	0.9	15	1
IPDC	16.7	16.7	0.8	50	1
APEXFOOT	219.9	219.9	0.7	3	1
MIRAKHTER	26.8	26.8	0.7	26	1
AIL	51.7	51.7	0.7	13	1
IFIC	6.4	6.4	0.6	100	1
BSC	95.0	95.0	0.6	6	1
LHB	49.9	49.9	0.6	11	1
Total			109.0		49

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
IPDC		5.0%	5.0%	Record Date	8-May-25
BDFINANCE		0.0%	0.0%	Record Date	8-May-25
IDLC		5.0%	15.0%	Record Date	12-May-25
JAMUNABANK		6.5%	17.5%	Record Date	14-May-25
PRAGATIINS		7.0%	20.0%	Record Date	19-May-25
UNITEDINS		0.0%	15.0%	Record Date	20-May-25
BNICL		0.0%	20.0%	Record Date	20-May-25
HEIDELBCEM		0.0%	25.0%	Record Date	20-May-25
AGRANINS		6.0%	6.0%	Record Date	20-May-25
UNITEDFIN		0.0%	10.0%	Record Date	21-May-25
BGIC		0.0%	10.0%	Record Date	21-May-25
STANDARINS		0.0%	10.0%	Record Date	22-May-25
MTB		10.0%	0.0%	Record Date	22-May-25
MIDLANDBNK		3.0%	3.0%	Record Date	22-May-25
DUTCHBANGL		10.0%	10.0%	Record Date	22-May-25

Important DSE News
RECKITT BEN

(Q1 Un-audited): EPS was Tk. 32.45 for January-March 2025 as against Tk. 32.10 for January-March 2024. NOCFPS was Tk. 79.64 for January-March 2025 as against Tk. 69.23 (rearranged) for January-March 2024. NAV per share was Tk. 383.09 as on March 31, 2025 and Tk. 350.64 as on December 31, 2024.

NRBCBANK

The company has informed that Bangladesh Bank vide their letter dated May 05, 2025 has appointed Dr. Md. Touhidul Alam Khan, FCMA, CSRA as the Managing Director and CEO of the company.

IPDC

Refer to their earlier news disseminated by DSE on 17.04.2025 regarding dividend declaration, the company has further informed that the issuance of 5% stock dividend is pending at Bangladesh Securities and Exchange Commission (BSEC). Stock Dividend will be disbursed/credited upon having approval/decision from BSEC. Once the approval is obtained a 2nd record date for stock dividend only will be declared accordingly.

MAGURAPLEX

Mr. Mohiuddin Ahmed, one of the Sponsors of the company, passed away on 02.12.2024. The company has informed that his holding of 870,800 shares (out of his total holding of 940,464 shares) will be transmitted to the account of his nominee Mr. Mostafa Jamal Mohiuddin who is son of Late Mohiuddin Ahmed and also a Director of the company.

SPCL

Mr. A.K.M Badiul Alam, a Director of the company, has further informed that he has completed his transfer of 3,000,000 shares of the company to his son Mr. Manshoo Alam by way of gift outside the trading system of the Exchange as per declaration disseminated by DSE on 29.04.2025.

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