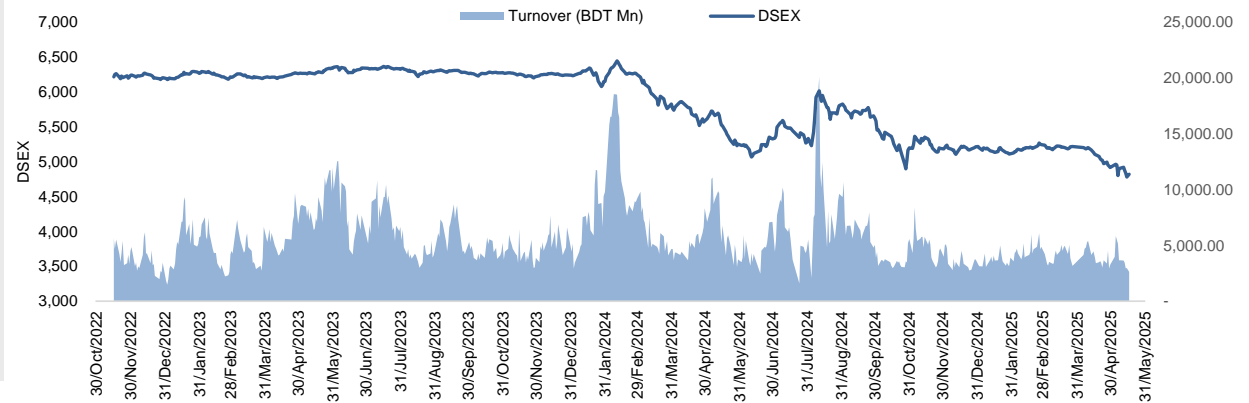


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.83%) gained 39.45 points and closed at 4,820.47. The blue-chip index DS30 (+1.02%), the Shariah-based index DSES (+1.34%), and the large-cap index CDSET (+0.54%) closed at 1,788.30, 1,052.78, and 992.55 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 1.95% followed by Engineering (+1.07%), Pharmaceutical (+0.94%), Fuel & Power (+0.93%), Bank (+0.51%), Telecommunication (-0.30%), and Food & Allied (-0.46%), respectively. Block trades contributed 13.9% of the overall market turnover. BRAC Bank Ltd. (+0.6%) was the most traded share with a turnover of BDT 132 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,820.47	4,781.02	+39.45	+0.83%	-7.6%
DS30	1,788.30	1,770.22	+18.08	+1.02%	-7.8%
DSES	1,052.78	1,038.88	+13.90	+1.34%	-9.9%
CDSET	992.55	987.24	+5.31	+0.54%	-6.9%

	Advanced	Declined	Unchanged	Total
All Category	277	79	40	396
A Category (Equity)	143	55	18	216
B Category (Equity)	73	6	4	83
N Category (Equity)	0	0	0	0
Z Category (Equity)	61	18	18	97
Mutual Funds	23	5	8	36
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,529,917	6,494,849	+0.5%
	Mn USD	53,295	53,009	
Turnover	Mn BDT	2,629	2,968	-11.4%
	Mn USD	21	24	
Volume	Mn Shares	130	149	-12.4%
No. of Trade		94,498	113,116	-16.5%

\* Average Interbank Exchange Rate is BDT 122.52 as of May 17, 2025

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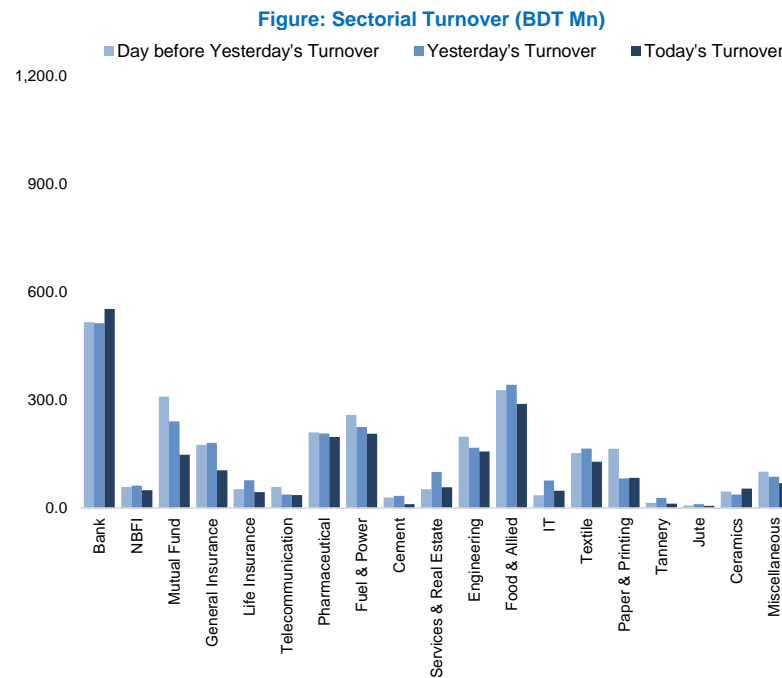
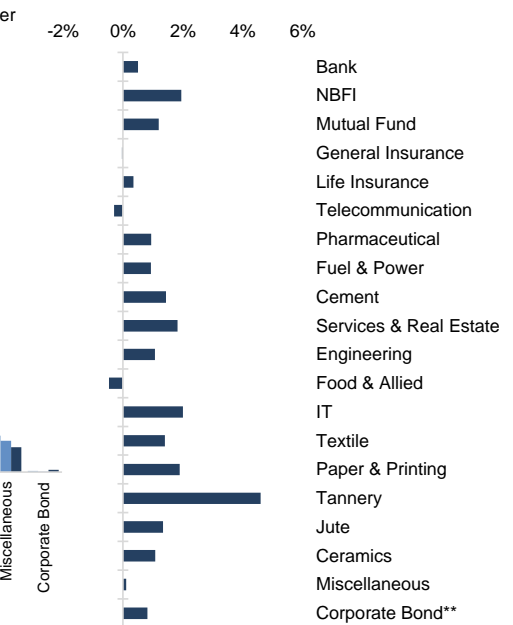


Figure: Sectorial Mcap Change



Market PE 14.5x

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	1,343	1,336	+6.79	+0.51%	36	635,452	9.8%	553.0	24.4%	6.8x	0.6x	GP	397,933	12.1%	8.2	13.6x	5.6x
NBFI	929	911	+17.80	+1.95%	23	88,539	1.4%	49.4	2.2%	NM	NM	SQURPHARMA	185,534	5.7%	15.5	7.9x	1.4x
Mutual Fund	656	648	+7.74	+1.19%	37	30,160	0.5%	148.1	6.5%	NM	0.6x	BATBC	158,058	4.8%	36.0	9.5x	3.0x
General Insurance	2,441	2,442	-0.74	-0.03%	43	69,697	1.1%	105.2	4.6%	11.7x	1.0x	ROBI	127,806	3.9%	27.1	17.7x	1.8x
Life Insurance	1,563	1,557	+5.45	+0.35%	15	41,559	0.6%	44.7	2.0%	NM	NM	WALTONHIL	123,564	3.8%	2.8	9.6x	1.1x
Telecommunication	4,679	4,693	-13.95	-0.30%	3	548,614	8.5%	36.2	1.6%	14.5x	3.5x	BEXIMCO	103,850	3.2%	0.2	NM	1.3x
Pharmaceutical	2,780	2,754	+26.00	+0.94%	34	527,013	8.1%	197.6	8.7%	12.2x	1.4x	BRACBANK	92,556	2.8%	132.2	6.8x	1.1x
Fuel & Power	1,042	1,032	+9.64	+0.93%	23	275,940	4.3%	206.6	9.1%	17.4x	0.6x	BERGERPBL	81,681	2.5%	0.8	23.8x	5.6x
Cement	1,713	1,688	+24.32	+1.44%	7	81,624	1.3%	10.9	0.5%	19.5x	1.8x	MARICO	80,643	2.5%	8.1	13.7x	10.7x
Services & Real Estate	889	874	+15.91	+1.82%	9	48,918	0.8%	57.7	2.5%	23.2x	0.4x	UPGDCL	68,868	2.1%	1.1	5.9x	1.6x
Engineering	2,199	2,175	+23.27	+1.07%	42	248,038	3.8%	157.2	6.9%	11.4x	0.8x	ISLAMIBANK	55,545	1.7%	2.5	11.9x	0.8x
Food & Allied	14,157	14,223	-65.73	-0.46%	21	259,038	4.0%	289.4	12.8%	15.0x	4.1x	LHB	52,262	1.6%	5.1	14.6x	2.6x
IT	1,667	1,635	+32.78	+2.01%	11	21,991	0.3%	48.1	2.1%	18.5x	1.4x	UNILEVERCL	42,282	1.3%	0.1	72.7x	16.4x
Textile	981	967	+13.58	+1.40%	58	102,168	1.6%	128.5	5.7%	NM	0.7x	BXPHARMA	39,659	1.2%	23.8	6.2x	0.8x
Paper & Printing	3,815	3,744	+71.07	+1.90%	6	17,234	0.3%	84.0	3.7%	NM	0.8x	DUTCHBANGL	37,526	1.1%	1.9	8.6x	0.7x
Tannery	1,809	1,729	+79.62	+4.60%	6	20,155	0.3%	12.6	0.6%	62.0x	1.5x	ICB	36,685	1.1%	3.8	NM	0.9x
Jute	9,989	9,857	+131.66	+1.34%	3	2,199	0.0%	6.0	0.3%	NM	NM	EBL	35,267	1.1%	6.7	5.2x	0.7x
Ceramics	350	347	+3.76	+1.08%	5	15,722	0.2%	53.8	2.4%	NM	1.0x	PUBALIBANK	32,507	1.0%	2.5	4.1x	0.6x
Miscellaneous	4,133	4,128	+4.62	+0.11%	15	224,441	3.5%	69.3	3.1%	91.0x	1.8x	CITYBANK	31,101	0.9%	96.8	3.1x	0.7x
Corporate Bond**	15,305	15,181	+124.41	+0.82%	16	33,521	0.5%	6.1	0.3%	NM	NM	OLYMPIC	28,751	0.9%	2.3	15.5x	2.4x
Treasury Bond**	1,959	1,948	+10.50	+0.54%	234	3,191,877	49.2%	0.0	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
ILFSL	3.3	+10.0%	0.3	NM	NM	SQURPHARMA	108,958	7.7%	7.9x	1.4x	BRACBANK	52.3	+0.6%	132.2	6.8x	1.1x
SPCERAMICS	18.8	+9.9%	40.2	NM	0.6x	ISLAMIBANK	74,730	5.3%	11.9x	0.8x	BEACHHATCH	46.5	+5.7%	116.4	9.9x	2.8x
SONARGAON	27.8	+9.9%	8.2	84.2x	1.4x	BEXIMCO	69,463	4.9%	NM	1.3x	CITYBANK	23.0	+0.4%	96.8	3.1x	0.7x
KPPL	16.7	+9.9%	12.8	NM	NM	BATBC	50,233	3.6%	9.5x	3.0x	UTTARABANK	19.8	-1.5%	95.6	7.8x	0.6x
PROGRESLIF	49.2	+9.8%	3.4	NM	NM	WALTONHIL	46,773	3.3%	9.6x	1.1x	BPPL	16.2	+4.5%	87.2	70.4x	0.6x
HRTEX	22.8	+9.62%	8.5	NM	7.7x	BRACBANK	46,489	3.3%	6.8x	1.1x	FINEFOODS	210.6	-0.2%	81.4	47.5x	14.4x
BEACONPHAR	102.1	+9.5%	16.4	27.5x	4x	GP	44,708	3.2%	13.6x	5.6x	MIDLANDBNK	25.2	+1.6%	54.3	19.2x	1.6x
FAREASTFIN	3.8	+8.6%	9.4	NM	NM	RENATA	32,968	2.3%	20.0x	1.6x	NRBBANK	12.4	-1.6%	49.0	20.4x	1.0x
SALAMCRST	17.9	+8.5%	21.3	NM	1.0x	BXPHARMA	23,409	1.7%	6.2x	0.8x	BSC	90.1	+2.7%	44.7	4.7x	0.9x
WMSHIPYARD	8.5	+7.6%	2.7	NM	0.5x	PUBALIBANK	22,905	1.6%	4.1x	0.6x	SPCERAMICS	18.8	+9.9%	40.2	NM	0.6x
						CITYBANK	21,020	1.5%	3.1x	0.7x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	20,953	1.5%	14.6x	2.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MERCINS	24.9	-5.7%	0.0	13.0x	1.3x	OLYMPIC	20,496	1.5%	15.5x	2.4x	SEMLLECMF	12.5	12.4	24.0	11,096	137.59
SEMLLECMF	12.5	-4.6%	9.7	NM	1x	ALARABANK	18,282	1.3%	14.5x	1.0x	EIL	46.4	46.2	21.0	2,926	135.23
TUNGHAI	2.6	-3.7%	0.1	NM	NM	BEACONPHAR	17,838	1.3%	27.5x	3.7x	RENATA	491.2	491.2	1.0	50	24.56
AZIZPIPES	43.9	-3.3%	0.2	NM	NM	PRIMEBANK	16,142	1.1%	3.2x	0.6x	MARICO	2,560.0	2,439.1	2.0	7	18.92
NURANI	3.2	-3.0%	0.1	NM	0.3x	ROBI	14,876	1.1%	17.7x	1.8x	BRACBANK	50.8	50.8	1.0	200	10.16
PHOENIXFIN	3.5	-2.8%	0.0	NM	NM	UTTARABANK	13,699	1.0%	7.8x	0.6x	MIDLANDBNK	24.2	23.9	3.0	347	8.33
PROVATIINS	28.9	-2.7%	2.5	16.1x	1.3x	NBL	13,055	0.9%	NM	7.8x	ABB1STMF	4.9	4.9	1.0	1,380	6.76
RAKCERAMIC	18.6	-2.6%	1.5	NM	1.2x	BSRMLTD	12,852	0.9%	4.1x	0.4x	FINEFOODS	213.0	213.0	1.0	25	5.33
PRAGATILIF	82.7	-2.4%	5.0	NM	NM						ROBI	25.1	25.1	1.0	100	2.51
TITASGAS	17.5	-2.2%	3.1	NM	0.2x						SEAPEARL	40.0	40.0	2.0	55	2.22
* 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
SEMLLECMF	12.5	12.4	137.6	11,096	24
EIL	46.4	46.2	135.2	2,926	21
RENATA	491.2	491.2	24.6	50	1
MARICO	2,560.0	2,439.1	18.9	7	2
BRACBANK	50.8	50.8	10.2	200	1
MIDLANDBNK	24.2	23.9	8.3	347	3
ABB1STMF	4.9	4.9	6.8	1,380	1
FINEFOODS	213.0	213.0	5.3	25	1
ROBI	25.1	25.1	2.5	100	1
SEAPEARL	40.0	40.0	2.2	55	2
SUNLIFEINS	64.0	63.0	1.8	28	2
NPOLYMER	29.1	28.6	1.7	60	2
GREENDELT	40.6	40.6	1.0	25	1
TOSRIFA	20.0	20.0	1.0	50	1
KPPL	14.3	14.3	0.9	65	1
BATBC	281.5	281.5	0.7	3	1
SIMTEX	14.8	14.8	0.7	47	1
CAPMBDBLMF	9.2	9.2	0.7	74	1
BEACHHATCH	48.4	48.4	0.6	12	1
GPHISPAT	16.7	16.7	0.5	32	1
BSC	92.1	92.1	0.5	6	1
ACI	185.9	185.9	0.5	3	1
<b>Total</b>			<b>364.3</b>		<b>75</b>

#### Important DSE News

##### ROBI

**(Q1 Un-audited):** Consolidated EPS was Tk. 0.24 for January-March 2025 as against Tk. 0.20 for January-March 2024. Consolidated NOCFPS was Tk. 2.20 for January-March 2025 as against Tk. 1.74 for January-March 2024. Consolidated NAV per share was Tk. 13.32 as on March 31, 2025 and Tk. 12.96 as on March 31, 2024.

##### REPUBLIC

**(Q1 Un-audited):** EPS was Tk. 0.47 for January-March 2025 as against Tk. 0.56 for January-March 2024. NOCFPS was Tk. (0.07) for January-March 2025 as against Tk. 0.40 for January-March 2024. NAV per share was Tk. 19.78 as on March 31, 2025 and Tk. 18.88 as on March 31, 2024.

##### BDFINANCE

**(Q1 Un-audited):** Consolidated EPS was Tk. 0.05 for January-March 2025 as against Tk. 0.20 for January-March 2024. Consolidated NOCFPS was Tk. 0.05 for January-March 2025 as against Tk. 0.82 for January-March 2024. Consolidated NAV per share was Tk. (30.00) as on March 31, 2025 and Tk. (30.05) as on December 31, 2024.

##### BDTHAI

**(Q3 Un-audited):** Adjusted EPS was Tk. (0.59) for January-March 2025 as against Tk. (0.25) for January-March 2024; Adjusted EPS was Tk. (1.49) for July 2024-March 2025 as against Tk. (0.67) for July 2023-March 2024. NOCFPS was Tk. (1.13) for July 2024-March 2025 as against Tk. (0.75) for July 2023-March 2024. NAV per share was Tk. 28.09 as on March 31, 2025 and Tk. 30.56 as on June 30, 2024.

##### ASIAPACINS

Refer to their earlier news disseminated by DSE on 04.05.2025 regarding dividend declaration, the company has further informed that since the declared Record Date (12.06.2025) of the Company falls in public holiday, the first market/trading day subsequent to such holiday shall be the Record Date i.e. 15.06.2025 as per section 23 of listing Regulation of DSE & CSE.

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PUBALIBANK		12.5%	12.5%	Record Date	22-May-25
CITYBANK		12.5%	12.5%	Record Date	22-May-25
SHAHJABANK		0.0%	10.0%	Record Date	22-May-25
CENTRALINS		0.0%	12.0%	Record Date	25-May-25

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