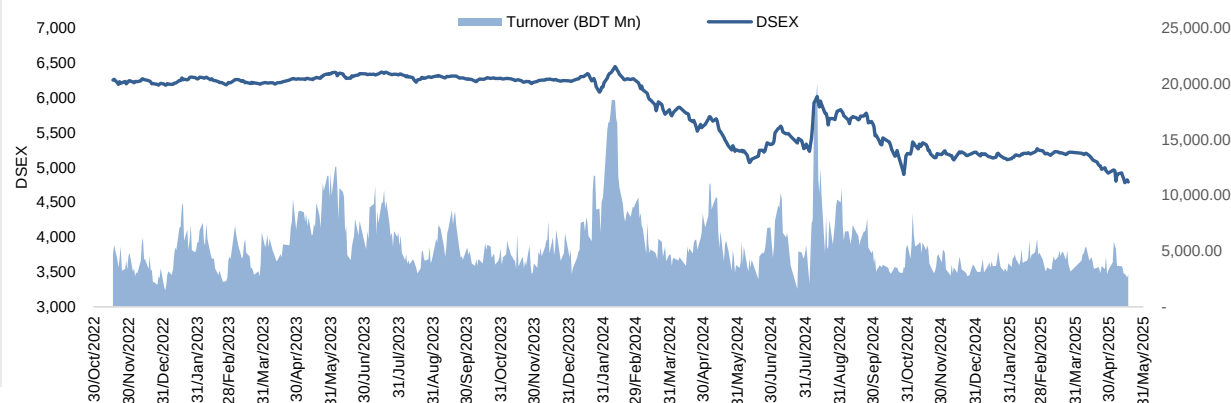


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.61%) lost 29.38 points and closed at 4,791.09. The blue-chip index DS30 (-0.45%), the Shariah-based index DSES (-0.63%), and the large-cap index CDSET (-0.30%) closed at 1,780.28, 1,046.15, and 989.60 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 1.03% followed by Bank (-0.94%), Food & Allied (-0.63%), Pharmaceutical (-0.61%), Engineering (-0.48%), NBFI (-0.31%), and Telecommunication (+0.06%), respectively. Block trades contributed 3.2% of the overall market turnover. Beach Hatchery Ltd. (-4.7%) was the most traded share with a turnover of BDT 149 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,791.09	4,820.47	-29.38	-0.61%	-8.2%
DS30	1,780.28	1,788.30	-8.02	-0.45%	-8.2%
DSES	1,046.15	1,052.78	-6.63	-0.63%	-10.5%
CDSET	989.60	992.55	-2.95	-0.30%	-7.2%

1,200.0

Figure: Sectorial Turnover (BDT Mn)

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

900.0

Figure: Sectorial Mcap Change

-5% 0% 5%

	Advanced	Declined	Unchanged	Total
All Category	102	241	57	400
A Category (Equity)	55	142	24	221
B Category (Equity)	17	57	8	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	30	42	25	97
Mutual Funds	1	29	6	36
Corporate Bonds	0	4	0	4
Treasury Bonds	0	3	0	3

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,510,342	6,529,917	-0.3%
	Mn USD	53,024	53,184	
Turnover	Mn BDT	2,926	2,629	+11.3%
	Mn USD	24	21	
Volume	Mn Shares	167	130	+28.4%
	No. of Trade	110,982	94,498	+17.4%

* Average Interbank Exchange Rate is BDT 122.78 as of May 18, 2025

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1,200.0

900.0

600.0

300.0

0.0

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	1,330	1,343	-12.61	-0.94%	36	629,484	9.7%	567.7	20.0%	6.8x	0.6x	GP	399,959	12.3%	16.3	13.7x	5.6x
NBFI	926	929	-2.91	-0.31%	23	88,261	1.4%	100.3	3.5%	NM	NM	SQURPHARMA	185,977	5.7%	20.6	7.9x	1.4x
Mutual Fund	634	656	-22.35	-3.41%	37	29,133	0.5%	220.5	7.8%	NM	0.6x	BATBC	157,410	4.8%	20.7	9.5x	3.0x
General Insurance	2,460	2,441	+18.50	+0.76%	43	70,225	1.1%	284.4	10.0%	11.8x	1.1x	ROBI	126,234	3.9%	13.2	17.5x	1.8x
Life Insurance	1,548	1,563	-14.38	-0.92%	15	41,177	0.6%	71.4	2.5%	NM	NM	WALTONHIL	123,534	3.8%	2.8	9.6x	1.1x
Telecommunication	4,681	4,679	+2.76	+0.06%	3	548,937	8.5%	30.7	1.1%	14.5x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,763	2,780	-16.89	-0.61%	34	523,810	8.1%	197.0	7.0%	12.1x	1.4x	BRACBANK	92,733	2.8%	36.5	6.8x	1.1x
Fuel & Power	1,031	1,042	-10.73	-1.03%	23	273,098	4.2%	227.0	8.0%	17.2x	0.6x	BERGERPBL	81,444	2.5%	0.7	23.7x	5.6x
Cement	1,681	1,713	-31.30	-1.83%	7	80,132	1.2%	36.7	1.3%	19.2x	1.7x	MARICO	80,073	2.5%	3.4	13.6x	10.6x
Services & Real Estate	874	889	-15.31	-1.72%	9	48,077	0.7%	40.7	1.4%	22.8x	0.4x	UPGDCL	68,578	2.1%	2.4	5.9x	1.6x
Engineering	2,188	2,199	-10.50	-0.48%	42	246,853	3.8%	210.8	7.4%	11.3x	0.7x	ISLAMIBANK	54,740	1.7%	6.0	11.7x	0.7x
Food & Allied	14,069	14,157	-88.56	-0.63%	21	257,418	4.0%	252.7	8.9%	14.9x	4.1x	LHB	51,333	1.6%	27.3	14.3x	2.6x
IT	1,650	1,667	-16.95	-1.02%	11	21,768	0.3%	63.3	2.2%	18.3x	1.4x	UNILEVERCL	41,879	1.3%	0.3	72.0x	16.2x
Textile	979	981	-2.17	-0.22%	58	101,941	1.6%	172.7	6.1%	NM	0.7x	BXPHARMA	39,347	1.2%	29.1	6.1x	0.8x
Paper & Printing	3,800	3,815	-14.84	-0.39%	6	17,167	0.3%	93.2	3.3%	NM	0.8x	DUTCHBANGL	37,613	1.2%	1.8	8.7x	0.7x
Tannery	1,884	1,809	+75.34	+4.17%	6	20,994	0.3%	24.1	0.8%	64.5x	1.5x	ICB	36,251	1.1%	2.3	NM	0.9x
Jute	9,834	9,989	-154.45	-1.55%	3	2,165	0.0%	6.7	0.2%	NM	NM	EBL	35,587	1.1%	9.8	5.2x	0.7x
Ceramics	351	350	+0.19	+0.05%	5	15,731	0.2%	98.6	3.5%	NM	1.0x	PUBALIBANK	32,391	1.0%	7.8	4.1x	0.6x
Miscellaneous	4,124	4,133	-8.80	-0.21%	15	223,963	3.5%	126.5	4.5%	90.8x	1.8x	CITYBANK	31,101	1.0%	139.0	3.1x	0.7x
Corporate Bond**	15,208	15,305	-96.91	-0.63%	16	33,309	0.5%	0.1	0.0%	NM	NM	OLYMPIC	28,411	0.9%	4.4	15.4x	2.4x
Treasury Bond**	1,958	1,959	-0.30	-0.02%	234	3,190,950	49.4%	8.5	0.3%	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
SONARGAON	30.5	+9.7%	7.1	92.4x	1.6x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	BEACHHATCH	44.3	-4.7%	148.9	9.4x	2.7x
PRIMEFIN	4.6	+9.5%	2.2	NM	0.7x	ISLAMIBANK	74,730	5.3%	11.7x	0.7x	CITYBANK	23.0	-	139.0	3.1x	0.7x
ILFSL	3.6	+9.1%	8.3	NM	NM	BEXIMCO	69,463	4.9%	NM	1.3x	NRBBANK	11.2	-9.7%	127.0	18.4x	0.9x
PHOENIXFIN	3.8	+8.6%	1.7	NM	NM	BATBC	50,233	3.6%	9.5x	3.0x	SPCERAMICS	19.6	+4.3%	86.1	NM	0.7x
CITYGENINS	42.3	+7.9%	57.5	13.5x	1.9x	WALTONHIL	46,773	3.3%	9.6x	1.1x	BPPL	14.9	-8.0%	84.6	64.8x	0.6x
FAREASTFIN	4.1	+7.89%	42.1	NM	NM	BRACBANK	46,489	3.3%	6.8x	1.1x	UTTARABANK	19.3	-2.5%	80.2	7.4x	0.6x
BATASHOE	887.3	+7.5%	10.3	25.3x	4x	GP	44,708	3.2%	13.7x	5.6x	BSC	89.3	-0.9%	61.6	4.6x	0.9x
HRTEX	24.3	+6.6%	17.2	NM	8.2x	RENATA	32,968	2.3%	19.7x	1.6x	CITYGENINS	42.3	+7.9%	57.5	13.5x	1.9x
MEGCONMILK	22.0	+6.3%	0.0	NM	NM	BXPHARMA	23,409	1.7%	6.1x	0.8x	KBPPWBIL	115.8	-	55.3	NM	9.7x
FASFIN	3.6	+5.9%	1.8	NM	NM	PUBALIBANK	22,905	1.6%	4.1x	0.6x	CRYSTALINS	43.8	+5.8%	52.8	13.9x	1.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	CITYBANK	21,020	1.5%	3.1x	0.7x						
FBFIF	3.7	-9.8%	36.2	NM	0.4x	LHB	20,953	1.5%	14.3x	2.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NRBBANK	11.2	-9.7%	127.0	18.4x	1x	OLYMPIC	20,496	1.5%	15.4x	2.4x	DBH	35.5	35.5	2.0	450	15.98
BGIC	32.0	-8.0%	8.3	22.4x	1.6x	ALARABANK	18,282	1.3%	14.4x	1.0x	BEACONPHAR	112.2	112.2	2.0	123	13.76
BPPL	14.9	-8.0%	84.6	64.8x	0.6x	BEACONPHAR	17,838	1.3%	26.8x	3.6x	FINEFOODS	208.0	200.0	6.0	54	11.13
CAPMIBBLMF	8.5	-7.6%	3.0	NM	0.9x	PRIMEBANK	16,142	1.1%	3.2x	0.6x	IFIC	6.9	6.3	2.0	1,509	9.55
IFIC1STMF	3.8	-7.3%	11.3	NM	0.4x	ROBI	14,876	1.1%	17.5x	1.8x	SEMLLECMF	13.0	13.0	2.0	684	8.89
SEMLFBSLGF	5.8	-6.5%	3.6	NM	0.6x	UTTARABANK	13,699	1.0%	7.4x	0.6x	GP	320.1	320.1	1.0	25	8.00
NRBCBANK	7.7	-6.1%	13.4	2.7x	0.4x	NBL	13,055	0.9%	NM	7.8x	BEXIMCO	99.5	99.4	2.0	45	4.48
SPCL	36.3	-5.7%	26.4	98.1x	0.9x	BSRMLTD	12,852	0.9%	4.1x	0.4x	KDSALTD	46.0	42.0	6.0	90	3.96
PHPMF1	3.5	-5.4%	9.6	NM	0.4x	* 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					ABB1STMF	5.0	5.0	2.0	675	3.38
											FAREASTLIF	25.0	25.0	2.0	79	1.97

* 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	Important DSE News
DBH	35.5	35.5	16.0	450	2	PADMAOIL The company has informed that Mr. Md. Mafizur Rahman has been appointed as Managing Director of the company with effect from May 17, 2025.
BEACONPHAR	112.2	112.2	13.8	123	2	
FINEFOODS	208.0	200.0	11.1	54	6	
IFIC	6.9	6.3	9.6	1,509	2	
SEMLLECMF	13.0	13.0	8.9	684	2	
GP	320.1	320.1	8.0	25	1	
BEXIMCO	99.5	99.4	4.5	45	2	
KDSALTD	46.0	42.0	4.0	90	6	
ABB1STMF	5.0	5.0	3.4	675	2	
FAREASTLIF	25.0	25.0	2.0	79	2	
PREMIERBAN	8.4	8.4	1.7	200	1	
NRBBANK	13.4	12.6	1.4	112	2	
LHB	41.5	41.5	1.2	30	1	
ORIONINFU	355.0	355.0	1.1	3	1	
KBPPWBIL	104.4	104.4	1.0	10	1	
TOSRIFA	19.6	19.6	1.0	50	1	
MAGURAPLEX	78.0	78.0	0.7	9	1	
BEACHHATCH	47.9	47.9	0.7	14	1	
CAPMIBBLMF	9.7	9.7	0.6	60	1	
BPPL	14.6	14.6	0.5	38	1	
HAKKANIPUL	51.9	51.9	0.5	10	1	
CRYSTALINS	45.5	45.5	0.5	11	1	
Total			92.5		41	

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
PROGRESLIF		0.0%	0.0%	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

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