

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.31%) lost 14.75 points and closed at 4,776.33. The blue-chip index DS30 (-0.47%), the Shariah-based index DSES (-0.40%), and the large-cap index CDSET (-0.50%) closed at 1,771.98, 1,041.94, and 984.62 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.39% followed by NBF (1.14%), Telecommunication (-0.68%), Bank (-0.54%), Engineering (-0.48%), Pharmaceutical (-0.36%), and Fuel & Power (+0.39%), respectively. Block trades contributed 9.9% of the overall market turnover. Orion Infusion Ltd. (+3.1%) was the most traded share with a turnover of BDT 141 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,776.33	4,791.09	-14.75	-0.31%	-8.4%
DS30	1,771.98	1,780.28	-8.30	-0.47%	-8.6%
DSES	1,041.94	1,046.15	-4.22	-0.40%	-10.9%
CDSET	984.62	989.60	-4.98	-0.50%	-7.6%

	Advanced	Declined	Unchanged	Total
All Category	125	202	70	397
A Category (Equity)	56	135	27	218
B Category (Equity)	41	27	14	82
N Category (Equity)	1	0	0	1
Z Category (Equity)	27	40	29	96
Mutual Funds	5	24	7	36
Corporate Bonds	3	1	0	4
Treasury Bonds	1	1	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,490,918	6,510,342	-0.3%
	Mn USD	52,932	53,090	
Turnover	Mn BDT	2,888	2,926	-1.3%
	Mn USD	24	24	
Volume	Mn Shares	171	167	+2.2%
	No. of Trade	103,308	110,982	-6.9%

* Average Interbank Exchange Rate is BDT 122.63 as of May 19, 2025

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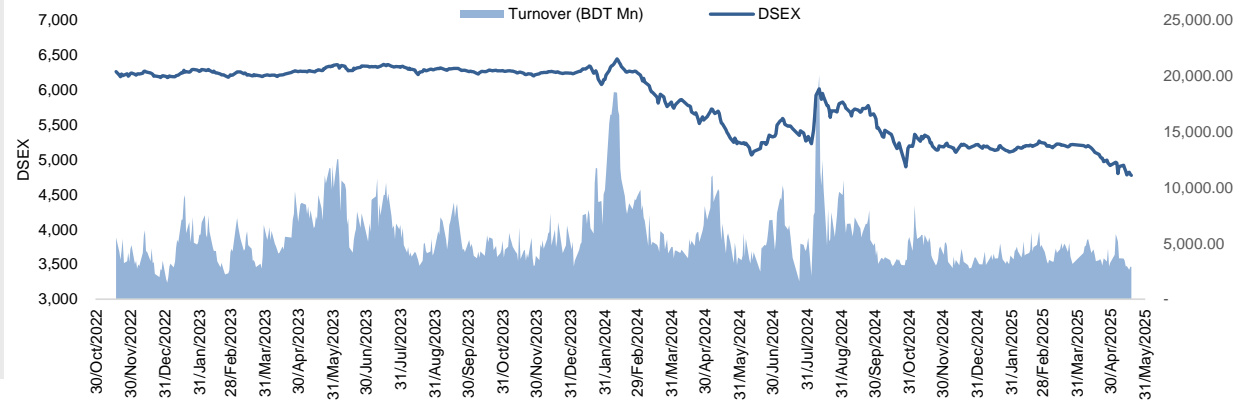


Figure: Sectorial Turnover (BDT Mn)

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

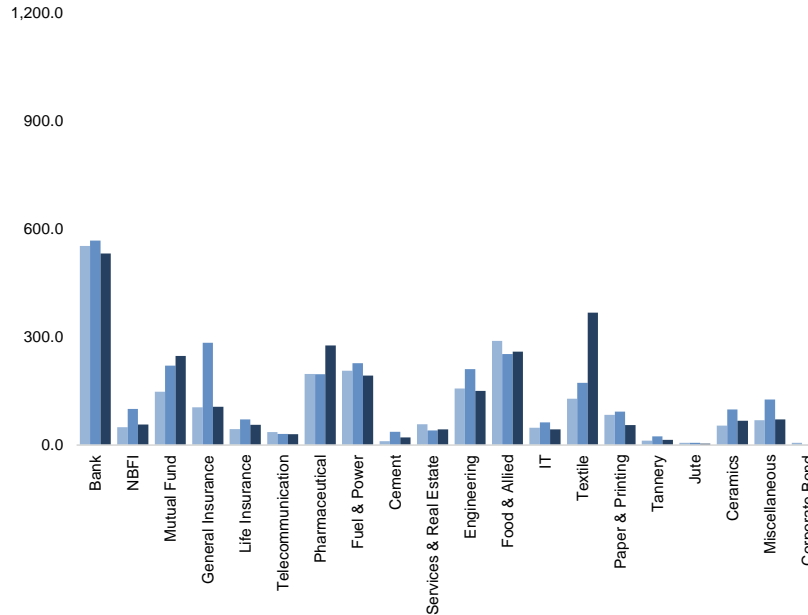
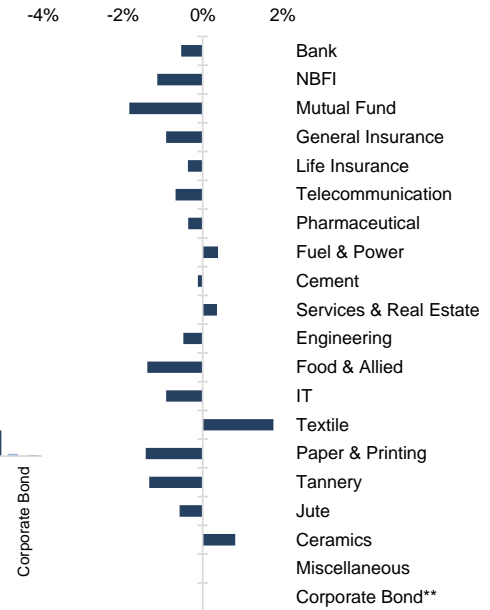


Figure: Sectorial Mcap Change



Market PE 14.4x

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	1,323	1,330	-7.16	-0.54%	36	626,099	9.7%	531.9	20.4%	6.7x	0.6x	GP	397,123	12.2%	12.9	13.6x	5.6x
NBFI	916	926	-10.56	-1.14%	23	87,255	1.4%	57.3	2.2%	NM	NM	SQURPHARMA	185,534	5.7%	25.6	7.9x	1.4x
Mutual Fund	622	634	-11.67	-1.84%	37	28,597	0.4%	247.5	9.5%	NM	0.5x	BATBC	153,792	4.7%	34.5	9.3x	2.9x
General Insurance	2,437	2,460	-22.60	-0.92%	43	69,580	1.1%	106.5	4.1%	11.7x	1.0x	ROBI	125,710	3.9%	13.2	17.4x	1.8x
Life Insurance	1,542	1,548	-5.77	-0.37%	15	41,023	0.6%	56.1	2.2%	NM	NM	WALTONHIL	122,716	3.8%	5.0	9.5x	1.1x
Telecommunication	4,650	4,681	-31.84	-0.68%	3	545,203	8.5%	30.3	1.2%	14.4x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,753	2,763	-10.03	-0.36%	34	521,908	8.1%	276.4	10.6%	12.0x	1.4x	BRACBANK	92,379	2.8%	59.2	6.8x	1.1x
Fuel & Power	1,035	1,031	+3.98	+0.39%	23	274,153	4.3%	192.9	7.4%	17.3x	0.6x	BERGERPBL	81,393	2.5%	0.5	23.7x	5.6x
Cement	1,679	1,681	-1.99	-0.12%	7	80,037	1.2%	21.1	0.8%	19.2x	1.7x	MARICO	79,018	2.4%	5.9	13.4x	10.5x
Services & Real Estate	877	874	+3.14	+0.36%	9	48,249	0.7%	43.9	1.7%	22.9x	0.4x	UPGDCL	69,911	2.2%	1.8	6.0x	1.7x
Engineering	2,178	2,188	-10.60	-0.48%	42	245,657	3.8%	150.7	5.8%	11.3x	0.7x	ISLAMIBANK	54,740	1.7%	6.0	11.7x	0.7x
Food & Allied	13,873	14,069	-195.45	-1.39%	21	253,841	3.9%	259.7	10.0%	14.7x	4.0x	LHB	51,217	1.6%	11.4	14.3x	2.6x
IT	1,635	1,650	-15.12	-0.92%	11	21,569	0.3%	43.8	1.7%	18.1x	1.4x	UNILEVERCL	41,675	1.3%	0.2	71.7x	16.1x
Textile	996	979	+17.35	+1.77%	58	103,749	1.6%	368.0	14.1%	NM	0.7x	BXPHARMA	39,169	1.2%	16.3	6.1x	0.8x
Paper & Printing	3,746	3,800	-54.19	-1.43%	6	16,922	0.3%	55.3	2.1%	NM	0.8x	DUTCHBANGL	37,526	1.2%	2.0	8.6x	0.7x
Tannery	1,859	1,884	-25.21	-1.34%	6	20,714	0.3%	14.3	0.6%	63.7x	1.5x	EBL	35,427	1.1%	26.0	5.2x	0.7x
Jute	9,777	9,834	-57.07	-0.58%	3	2,152	0.0%	4.1	0.2%	NM	NM	ICB	35,384	1.1%	5.4	NM	0.8x
Ceramics	353	351	+2.85	+0.81%	5	15,859	0.2%	67.7	2.6%	NM	1.0x	PUBALIBANK	32,854	1.0%	4.2	4.2x	0.6x
Miscellaneous	4,125	4,124	+0.31	+0.01%	15	223,980	3.5%	71.0	2.7%	90.8x	1.8x	CITYBANK	31,101	1.0%	83.6	3.1x	0.7x
Corporate Bond**	15,208	15,208	-0.20	-0.00%	16	33,308	0.5%	1.5	0.1%	NM	NM	OLYMPIC	28,651	0.9%	0.9	15.5x	2.4x
Treasury Bond**	1,955	1,958	-3.03	-0.15%	234	3,185,357	49.4%	2.0	0.1%	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
KTL	11.0	+10.0%	31.2	NM	0.7x	SQURPHARMA	108,958	7.7%	7.9x	1.4x	ORIONINFU	358.0	+3.1%	141.0	NM	22.8x
SONARGAON	33.5	+9.8%	43.1	NM	1.7x	ISLAMIBANK	74,730	5.3%	11.7x	0.7x	BEACHHATCH	44.1	-0.5%	114.5	9.4x	2.7x
ESQUIRENIT	22.9	+9.6%	24.9	9.8x	0.4x	BEXIMCO	69,463	4.9%	NM	1.3x	MIDLANDBNK	22.5	-9.3%	97.0	17.2x	1.5x
MONNOFABR	13.5	+8.9%	34.1	NM	0.5x	BATBC	50,233	3.6%	9.3x	2.9x	CITYBANK	23.0	-	83.6	3.1x	0.7x
SHARPIND	17.3	+8.1%	10.6	27.0x	1.7x	WALTONHIL	46,773	3.3%	9.5x	1.1x	ABB1STMF	4.4	-4.3%	77.9	NM	0.5x
REGENTTEX	3.4	+6.25%	0.1	NM	0.1x	BRACBANK	46,489	3.3%	6.8x	1.1x	BPPL	15.0	+0.7%	74.5	65.2x	0.6x
GHAIL	11.1	+5.7%	8.4	NM	1x	GP	44,708	3.2%	13.6x	5.6x	NRBBANK	10.9	-2.7%	69.9	17.9x	0.8x
FIRSTFIN	3.7	+5.7%	0.3	NM	NM	RENATA	32,968	2.3%	19.8x	1.6x	BRACBANK	52.2	-0.4%	59.2	6.8x	1.1x
UCB	11.3	+5.6%	33.6	3.4x	0.4x	BXPHARMA	23,409	1.7%	6.1x	0.8x	FBFIF	3.4	-8.1%	56.0	NM	0.4x
DESCO	22.0	+4.8%	1.1	NM	0.6x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	SPCERAMICS	19.8	+1.0%	53.1	NM	0.7x
						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%	14.3x	2.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MEGCONMILK	19.8	-10.0%	0.5	NM	NM	OLYMPIC	20,496	1.5%	15.5x	2.4x	SEMLLECMF	13.2	12.0	9.0	5,236	68.92
MIDLANDBNK	22.5	-9.3%	97.0	17.2x	1x	ALARABANK	18,282	1.3%	13.9x	1.0x	EIL	46.0	46.0	5.0	1,429	65.74
FBFIF	3.4	-8.1%	56.0	NM	0.4x	BEACONPHAR	17,838	1.3%	26.4x	3.5x	FINEFOODS	230.6	206.0	4.0	138	29.20
CAPMBDBLMF	8.8	-7.4%	7.2	NM	1.0x	PRIMEBANK	16,142	1.1%	3.1x	0.6x	ORIONINFU	341.2	335.2	10.0	67	22.67
NTC	140.1	-5.9%	0.3	NM	NM	ROBI	14,876	1.1%	17.4x	1.8x	KDSALTD	45.0	45.0	1.0	420	18.88
EBLNRBMF	3.5	-5.4%	1.1	NM	0.4x	UTTARABANK	13,699	1.0%	7.4x	0.6x	MIDLANDBNK	25.0	22.6	7.0	487	11.80
IFIC1STMF	3.6	-5.3%	12.0	NM	0.4x	NBL	13,055	0.9%	NM	7.6x	BRACBANK	57.6	57.6	1.0	130	7.45
TAKAFULINS	31.3	-5.2%	0.1	21.1x	1.7x	BSRMLTD	12,852	0.9%	4.0x	0.4x	BATBC	299.9	299.9	1.0	25	7.35
KPPL	16.0	-4.8%	7.3	NM	NM						DBH	35.5	35.5	2.0	150	5.33
CENTRALINS	27.6	-4.5%	2.9	15.9x	0.5x						EASTRNlub	2,158.0	2,158.0	1.0	2	5.09
* 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																
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Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEMLLECMF	13.2	12.0	68.9	5,236	9
EIL	46.0	46.0	65.7	1,429	5
FINEFOODS	230.6	206.0	29.2	138	4
ORIONINFU	341.2	335.2	22.7	67	10
KDSALTD	45.0	45.0	18.9	420	1
MIDLANDBNK	25.0	22.6	11.8	487	7
BRACBANK	57.6	57.6	7.5	130	1
BATBC	299.9	299.9	7.3	25	1
DBH	35.5	35.5	5.3	150	2
EASTRNLAB	2,158.0	2,158.0	5.1	2	1
ABB1STMF	5.0	5.0	5.0	1,000	1
BDCOM	23.0	23.0	4.2	185	1
RELIANCE1	18.6	17.6	4.0	220	5
BEXIMCO	99.7	99.6	3.0	30	6
PURABIGEN	17.0	17.0	2.9	170	1
DAFODILCOM	62.9	62.9	2.7	43	1
ROBI	26.4	26.4	2.6	100	1
NAVANAPHAR	54.0	52.0	2.5	48	2
BSC	98.1	98.1	1.9	20	1
SUNLIFEINS	68.5	68.0	1.8	26	2
NLTUBES	77.0	75.0	1.6	20	2
PTL	46.5	46.5	1.2	25	1
Total			285.7		79

Important DSE News

PRIMEFIN

(Q1 Un-audited): Consolidated EPS was Tk. (0.29) for January-March 2023 as against Tk. (0.34) for January-March 2022. Consolidated NOCFPS was Tk. (0.37) for January-March 2023 as against Tk. (0.41) for January-March 2022. Consolidated NAV per share was Tk. 6.71 as on March 31, 2023 and Tk. 6.99 as on March 31, 2022.

AGRANINS

Refer to their earlier news disseminated by DSE on 28.04.2025 regarding dividend declaration, the company has further informed that they are yet to receive approval of "Stock Dividend" from Bangladesh Securities and Exchange Commission (BSEC). They have also informed that if Stock Dividend is approved, there will be a separate record date.

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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