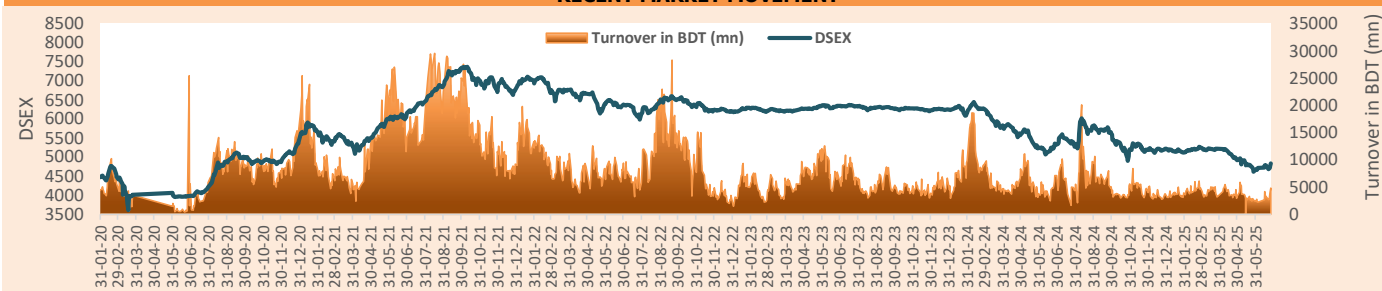


Thursday, June 26, 2025

RECENT MARKET MOVEMENT



DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	4,833	4,768	▲ 65.2	1.4%	2.4%	-7.4%	-8.9%
DS30	1,820	1,790	▲ 30.0	1.7%	4.5%	-6.2%	-4.4%
DSMEX (SME)	1,039	1,024	▲ 14.5	1.4%	15.5%	-4.8%	-29.1%
Market Cap (BDT bn)	6,616	6,577	▲ 38.8	0.6%	1.8%	-0.2%	1.0%
Turnover (BDT mn)	4,787	4,132	▲ 654.7	15.8%	69.4%	28.0%	-20.9%
Total Trade	152,594	134,535	▲ 18,059.0	13.4%	42.0%	26.2%	9.9%
Volume (mn)	187	147	▲ 40.6	27.7%	29.4%	56.1%	25.1%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	8,199	8,102	▲ 97.2	1.2%	1.6%	-7.0%	-8.7%
CASPI	13,400	13,235	▲ 165.5	1.3%	1.4%	-7.4%	-10.2%
Market Cap (BDT bn)	6,893	6,851	▲ 41.9	0.6%	1.9%	-1.0%	0.8%
Turnover (BDT mn)	609	438	▲ 171.1	39.1%	419.1%	1350.1%	319.3%
Total Trade	2,410	1,595	▲ 815.0	51.1%	34.0%	29.0%	-29.9%
Volume ('000)	21,273	6,746	▲ 14,527.4	215.4%	355.1%	1062.5%	712.2%

TODAY'S MARKET COMMENTARY

The capital bourse sustained its recovery mode as opportunistic investors turned back to the market following the easing of tensions over the market's momentum, while continued buy dominance across the trading board prompted the benchmark index to close above the 4,800-mark after around 1.5 months. DSEX, the broad index of the Dhaka Stock Exchange, advanced by 65.2 points to settle at 4,833 points as against 4,768 points in the previous trading session. Buyers maintained their dominance owing to positive expectations over the market's outlook following recent positive developments on the macroeconomic front, along with easing global tensions due to a ceasefire in the recent Middle East conflicts. Apparently, trading activities also increased by 15.8% to BDT 4.8 billion compared to BDT 4.1 billion in the previous session. On the sectoral front, Food (15.0%) issues exerted the highest turnover, followed by Bank (12.2%) and Pharma (12.2%) sectors. All the sectors displayed positive returns, out of which Tannery (2.2%), Telecom (2.2%) and Food (1.9%) exhibited the most positive returns on the bourse today. Out of the 397 issues traded, 293 advanced, 41 declined and 63 remained unchanged.

The port city bourse, CSE, also settled on a positive zone. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) advanced by 97.2 points and 165.5 points, respectively.

Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

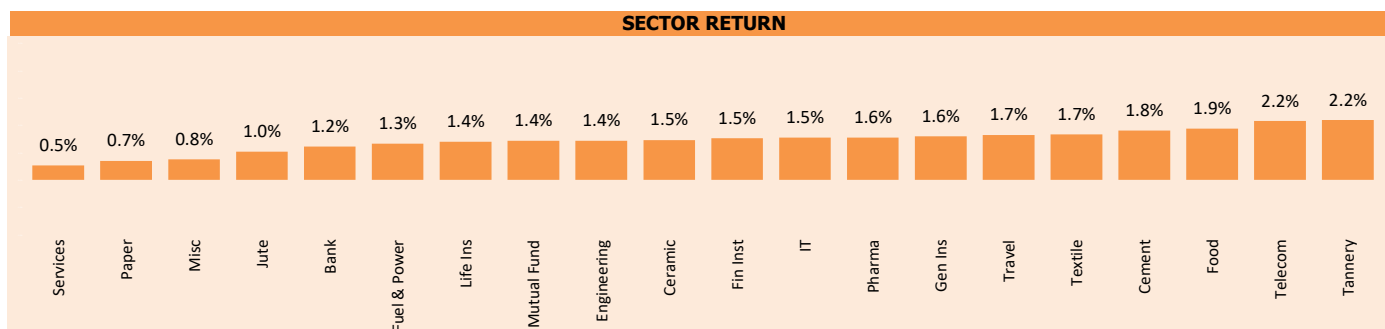
*Turnover includes block trade in DSE; **Return means Capital gain plus any dividend yield;

PE1=PE excludes stocks with negative earnings but includes MFs; PE2=PE includes stocks with negative earnings and MFs

> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

MARKET VALUATION			SCRIP WISE PERFORMANCE			
	Today	Yday	Advanced	Declined	Unchanged	
Market P/NAVPS	1.11	1.10				
Market Fw. P/E ₁	10.87	10.71	↑ 293	↓ 41	■ 63	
Market Fw. P/E ₂	20.46	20.17				

DAY'S SECTOR MOVEMENT							
Sector	Turnover (mn)	% of T/O	M. Cap (mn)	% of M. Cap	T.PE (x)	F. P/E (x)	P/NAV (x)
Bank	584.9	12.2%	620,529	18.9%	12.0	6.0	0.6
Cement	62.0	1.3%	85,785	2.6%	14.2	10.4	1.8
Ceramics	135.6	2.8%	16,723	0.5%	(153.5)	187.6	1.1
Engineering	407.4	8.5%	254,823	7.8%	11.9	12.1	0.8
Financial Institutions	74.1	1.5%	88,948	2.7%	(2.2)	22.8	(1.5)
Food & Allied	716.5	15.0%	260,441	7.9%	14.2	15.8	4.2
Fuel & Power	219.4	4.6%	281,951	8.6%	15.8	7.2	0.6
General Insurance	211.9	4.4%	69,642	2.1%	11.9	11.1	1.0
IT	177.0	3.7%	22,831	0.7%	17.2	16.8	1.3
Jute	26.3	0.5%	2,392	0.1%	(47.6)	31.6	(15.7)
Life Insurance	89.6	1.9%	41,514	1.3%	42.1	n/a	n/a
Miscellaneous	245.6	5.1%	223,368	6.8%	41.3	33.8	1.8
Mutual Fund	177.2	3.7%	28,022	0.9%	(5.7)	32.9	0.6
Paper & Printing	157.4	3.3%	17,975	0.5%	67.4	31.1	0.9
Pharma. & Chemicals	583.0	12.2%	529,803	16.1%	12.7	11.0	1.5
Services & Real Est.	23.4	0.5%	15,886	0.5%	12.6	8.9	0.7
Tannery	71.1	1.5%	20,845	0.6%	46.1	12.7	1.5
Telecommunication	69.4	1.5%	559,884	17.1%	12.4	17.5	3.6
Textile	510.2	10.7%	104,777	3.2%	194.6	11.9	0.7
Travel & Leisure	238.6	5.0%	34,847	1.1%	14.9	21.9	0.3
Equity Market	4,780.7	100.0%	3,280,985	100.0%			



TODAY'S INDEX (DSEX) PULLER ⁺			TODAY'S INDEX (DSEX) DRAGGER ⁺		
TICKER	%Δ in M.Cap	(+)ve Cont.	TICKER	%Δ in M.Cap	(-)ve Cont.
SQRPHARMA	2.4%	9.1	OLYMPIC	-0.6%	(0.5)
BRACBANK	2.4%	4.8	ACI	-1.1%	(0.4)
BATBC	2.8%	4.1	LOVELLO	-1.3%	(0.3)
GP	2.3%	3.5	KBPPWBIL	-0.8%	(0.2)
PRIMEBANK	3.2%	1.8	TRUSTBANK	-0.6%	(0.1)
BXPHARMA	1.6%	1.6	FAMILYTEX	-4.2%	(0.1)
KOHINOOR	4.1%	1.4	ACIFORMULA	-1.0%	(0.1)
BSRMLTD	3.0%	1.3	KPPL	-2.2%	(0.1)
ISLAMIBANK	0.6%	1.2	SILCOPHL	-1.3%	(0.0)
POWERGRID	5.2%	1.1	TAMIJTEX	-1.0%	(0.0)

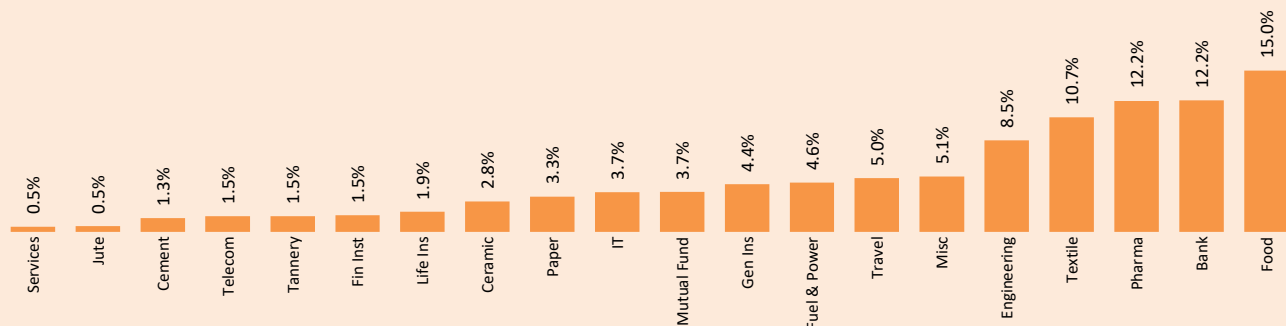
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

Note: Disclaimer has been annexed at the end of the report.

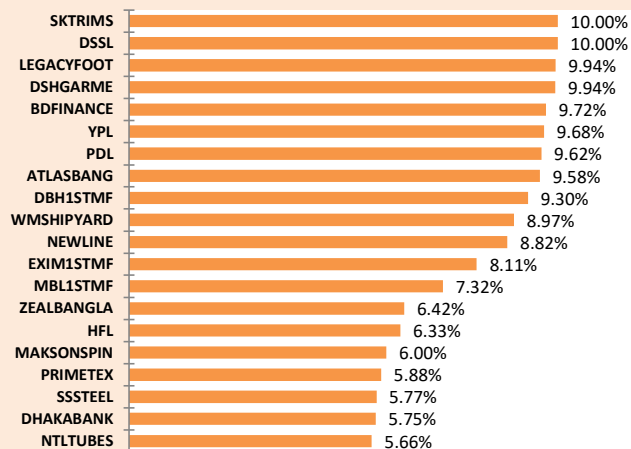
DAILY MARKET REVIEW

Thursday, June 26, 2025

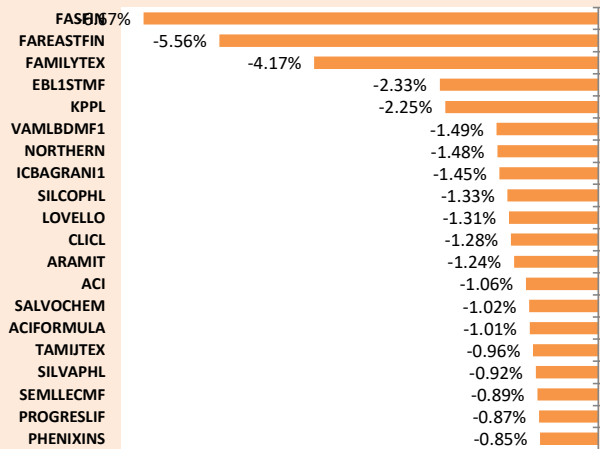
TURNOVER DISTRIBUTION



TOP GAINERS**



TOP LOSERS**



TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
LOVELLO	279.0	5.8%	105.4
BRACBANK	261.8	5.5%	51.1
SEAPEARL	207.5	4.3%	54.9
SQURPHARMA	176.9	3.7%	210.1
BEACHHATCH	130.1	2.7%	46.3
FINEFOODS	89.4	1.9%	235.9
AGNISYSL	86.3	1.8%	27.1
BATBC	83.2	1.7%	280.3
KBPPWBIL	75.2	1.6%	113.1
CITYBANK	72.8	1.5%	19.7
SPCERAMICS	72.4	1.5%	21.5
BSC	67.0	1.4%	90.5
BERGERPBL	63.3	1.3%	1736.6
HAKKANIPUL	60.7	1.3%	63.2
MAGURAPLEX	60.2	1.3%	83.4
DSSL	59.0	1.2%	9.9
CENTRALINS	56.2	1.2%	36.7
AIL	55.2	1.2%	45.5
NTLTUBES	49.4	1.0%	85.9
BXPBARMA	48.4	1.0%	87.5

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	408,736	12.5%	302.7
SQURPHARMA	186,243	5.7%	210.1
BATBC	151,362	4.6%	280.3
ROBI	128,853	3.9%	24.6
WALTONHIL	124,564	3.8%	411.2
BEXIMCO	103,575	3.2%	110.1
BRACBANK	101,736	3.1%	51.1
BERGERPBL	80,540	2.5%	1,736.6
MARICO	75,748	2.3%	2,404.7
UPGDCL	69,447	2.1%	119.8
RENATA	56,155	1.7%	489.6
LHB	55,049	1.7%	47.4
ISLAMIBANK	54,096	1.6%	33.6
UNILEVERCL	45,006	1.4%	2,335.0
ICB	39,374	1.2%	45.4
BXPBARMA	39,035	1.2%	87.5
DUTCHBANGL	38,281	1.2%	39.6
EBL	36,385	1.1%	22.8
PUBALIBANK	32,666	1.0%	25.1
OLYMPIC	29,931	0.9%	149.7

