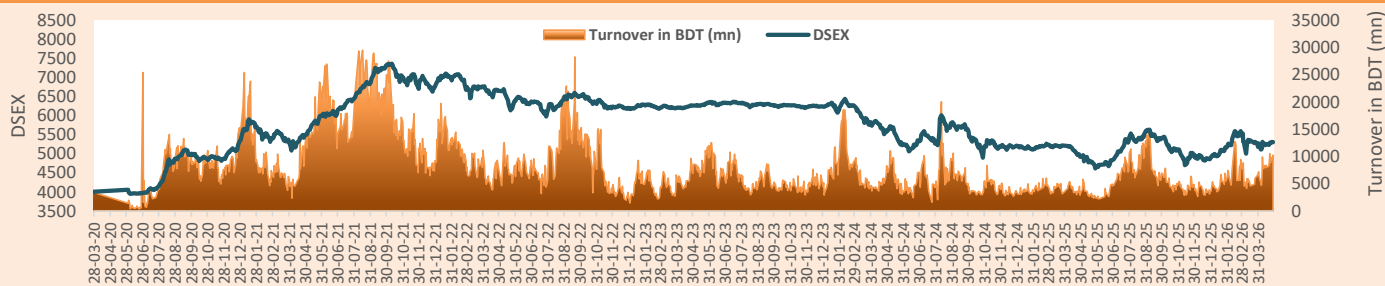


## DAILY MARKET REVIEW

Tuesday, April 28, 2026

### RECENT MARKET MOVEMENT



### DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	5,309	5,301	▲ 8.3	0.2%	0.7%	9.1%	7.6%
DS30	2,016	2,018	▼ (1.3)	-0.1%	0.9%	8.8%	10.5%
DSMEX (SME)	1,127	1,125	▲ 2.8	0.2%	12.0%	31.7%	22.4%
Market Cap (BDT bn)	6,852	6,838	▲ 13.6	0.2%	-1.4%	1.0%	4.4%
Turnover (BDT mn)	10,267	9,560	▲ 707.2	7.4%	58.8%	190.0%	252.7%
Total Trade	240,839	235,384	▲ 5,455.0	2.3%	21.5%	109.8%	114.5%
Volume (mn)	337	291	▲ 46.0	15.8%	8.4%	187.6%	186.4%

### CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	9,132	9,109	▲ 23.0	0.3%	1.1%	8.8%	8.4%
CASPI	14,867	14,841	▲ 26.6	0.2%	0.4%	9.2%	7.6%
Market Cap (BDT bn)	9,090	9,087	▲ 2.9	0.0%	0.9%	32.7%	32.1%
Turnover (BDT mn)	252	225	▲ 26.3	11.7%	-22.1%	375.0%	129.0%
Total Trade	2,096	1,715	▲ 381.0	22.2%	6.6%	133.1%	-48.1%
Volume ('000)	7,354	6,591	▲ 762.7	11.6%	25.3%	639.1%	72.7%

### TODAY'S MARKET COMMENTARY

The benchmark index of the capital bourse held firm, supported by resilient investor participation owing to continued accumulation in particular banking stocks amid earnings optimism and dividend expectations, although a persistent cautious sentiment sustained a broad-based selling pressure across the market. DSEX, the broad index of the Dhaka Stock Exchange, slightly advanced by 8.3 points to settle at 5,309 points as against 5,301 points in the previous trading session. Although market indices largely remained in positive territory, mid-session selling pressure pared some intraday gains; however, it was insufficient to dent earnings-driven optimism, with the market ultimately closing higher. Meanwhile, market turnover crossed the BDT 10 billion-mark again after three sessions, increasing by 7.4% to BDT 10.2 billion from BDT 9.6 billion in the previous session. On the sectoral front, Bank (21.5%) accounted for the highest share of turnover, followed by General Insurance (19.8%) and Textile (9.7%) sectors. Sectors mostly displayed mixed returns, out of which Services (2.0%), Food (1.3%) and Bank (1.1%) exhibited the most positive returns, while Travel (-1.5%), IT (-1.5%) and Paper (-1.1%) displayed the most corrections on the bourse today. Of the 397 issues traded, 88 advanced, 247 declined, and 61 remained unchanged.

The port city bourse, CSE, also settled on a positive territory. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) declined by 23.0 points and 26.6 points, respectively.

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

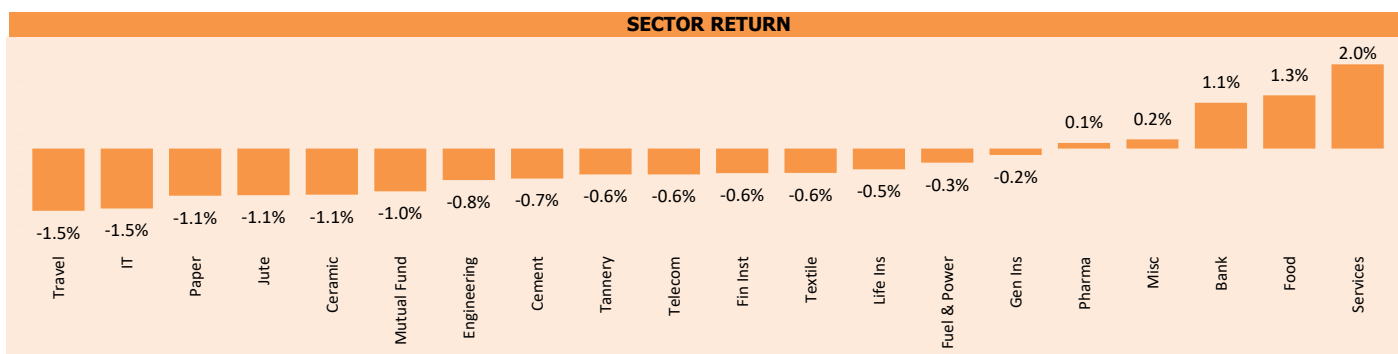
\*Turnover includes block trade in DSE; \*\*Return means Capital gain plus any dividend yield;

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

> 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	1.19	1.20					
Market Fw. P/E <sub>1</sub>	10.89	10.95	↑	88	↓	247	— 61

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	2,196.5	21.5%	727,108	21.3%	6.4	6.9	0.8	
Cement	48.7	0.5%	86,689	2.5%	12.1	13.0	1.9	
Ceramics	65.0	0.6%	18,180	0.5%	252.8	491.1	1.2	
Engineering	918.0	9.0%	272,608	8.0%	31.3	16.6	0.8	
Financial Institutions	74.4	0.7%	89,719	2.6%	11.0	18.1	n/a	
Food & Allied	579.3	5.7%	230,432	6.8%	41.6	23.1	3.7	
Fuel & Power	466.1	4.6%	275,915	8.1%	13.1	5.7	0.6	
General Insurance	2,025.6	19.8%	103,629	3.0%	20.4	15.8	1.5	
IT	248.3	2.4%	27,093	0.8%	30.5	21.1	1.5	
Jute	6.5	0.1%	2,327	0.1%	17.8	29.4	n/a	
Life Insurance	343.0	3.4%	51,411	1.5%	30.5	n/a	n/a	
Miscellaneous	520.9	5.1%	213,194	6.3%	89.3	31.5	1.7	
Mutual Fund	116.1	1.1%	25,199	0.7%	31.3	25.9	0.5	
Paper & Printing	117.3	1.1%	20,822	0.6%	27.5	32.4	1.2	
Pharma. & Chemicals	862.5	8.4%	562,432	16.5%	22.4	10.1	1.6	
Services & Real Estate	265.5	2.6%	24,108	0.7%	16.1	14.9	1.0	
Tannery	249.3	2.4%	23,526	0.7%	42.8	81.4	1.4	
Telecommunication	95.9	0.9%	503,993	14.8%	11.0	13.1	3.3	
Textile	998.0	9.7%	120,380	3.5%	22.0	17.6	0.8	
Travel & Leisure	38.6	0.4%	31,252	0.9%	23.6	20.3	0.3	
Equity Market	10,235.5	100.0%	3,410,017	100.0%				



TODAY'S INDEX (DSEX) PULLER <sup>&gt;</sup>				TODAY'S INDEX (DSEX) DRAGGER <sup>&gt;</sup>			
TICKER	%Δ in M.Cap	(+)ve Cont.		TICKER	%Δ in M.Cap	(-)ve Cont.	
NCCBANK	21.0%	7.6		BRACBANK	-1.2%	(3.8)	
PUBALIBANK	5.3%	6.9		ISLAMIBANK	-1.1%	(2.5)	
SOUTHEASTB	9.3%	3.2		BXPBARMA	-1.7%	(2.4)	
BATBC	2.5%	3.1		EBL	-1.8%	(2.1)	
BEACONPHAR	3.8%	2.1		CITYBANK	-1.2%	(1.7)	
DHAKABANK	6.6%	1.8		UCB	-2.3%	(1.1)	
DUTCHBANGL	6.7%	1.7		GP	-0.8%	(1.0)	
ASIATICLAB	4.3%	1.3		BSRMLTD	-1.5%	(0.8)	
BANKASIA	2.3%	1.2		WALTONHIL	-0.4%	(0.7)	
SQRPHARMA	0.3%	1.2		ACMEPL	-7.0%	(0.6)	

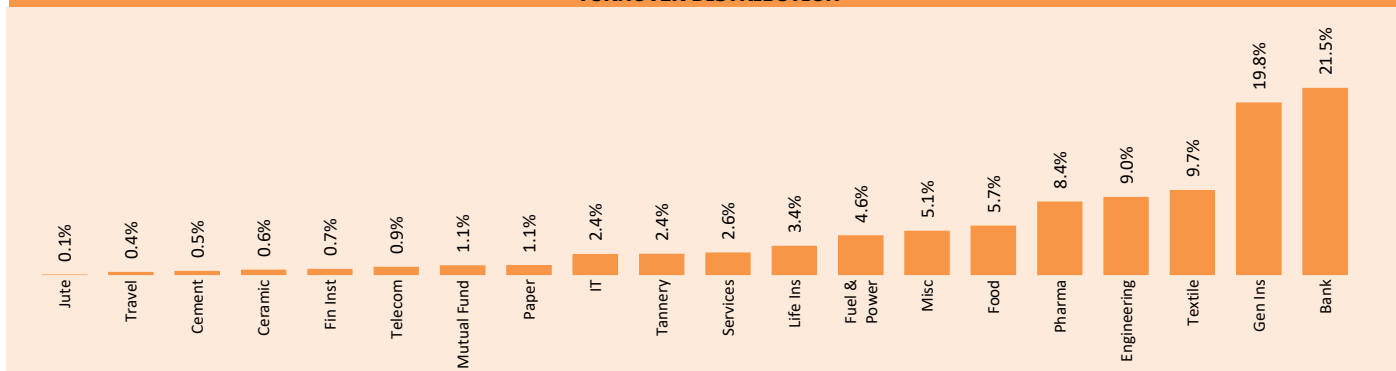
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

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

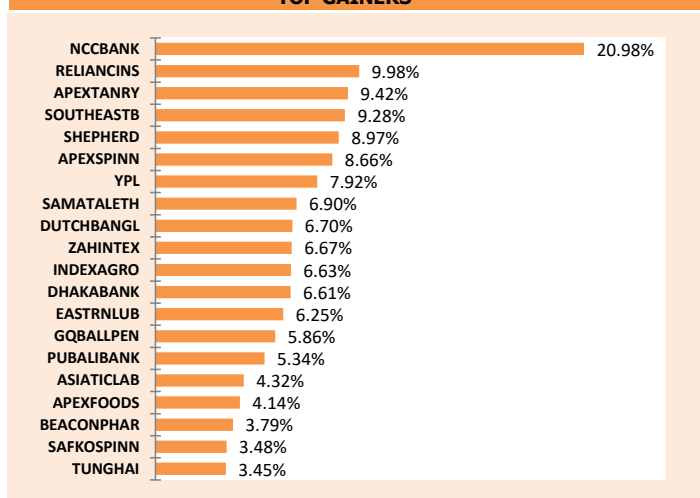
# DAILY MARKET REVIEW

Tuesday, April 28, 2026

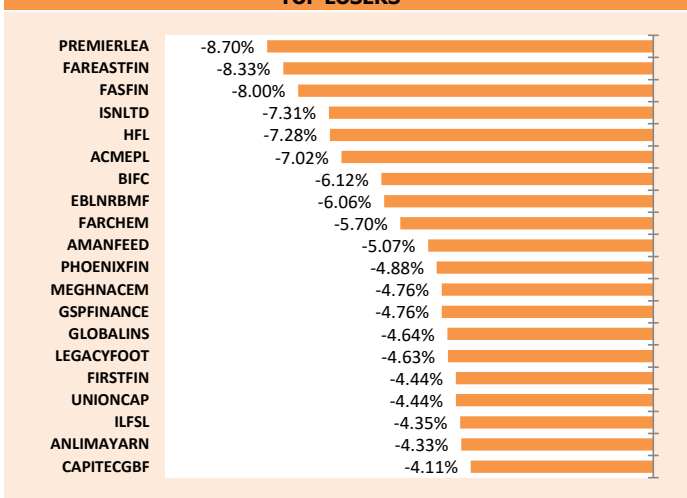
## TURNOVER DISTRIBUTION



## TOP GAINERS\*\*



## TOP LOSERS\*\*



## TOP 20 TURNOVER\* (BDT mn)

TICKER	Turnover	% Turnover	Price
NCCBANK	848.4	8.3%	17.3
CRYSTALINS	473.5	4.6%	86.4
CITYBANK	344.9	3.4%	32.9
LOVELLO	261.7	2.6%	88.2
APEXSPINN	227.2	2.2%	369.0
DOMINAGE	208.2	2.0%	63.9
SAPORTL	206.1	2.0%	52.1
GQBALLPEN	195.7	1.9%	630.2
ASIATICLAB	195.4	1.9%	111.0
ACMEPL	179.5	1.8%	22.5
KBPPWBIL	162.2	1.6%	50.0
EBL	142.4	1.4%	27.3
PEOPLESINS	141.7	1.4%	54.1
EASTRN LUB	122.5	1.2%	1613.3
PIONEERINS	121.1	1.2%	65.7
SHEPHERD	120.6	1.2%	17.0
TRUSTBANK	112.0	1.1%	18.2
RELIANCINS	109.5	1.1%	89.3
RUNNERAUTO	109.2	1.1%	37.7
SUNLIFEINS	105.3	1.0%	73.2

## TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	327,853	9.6%	242.8
SQURPHARMA	188,903	5.5%	213.1
ROBI	149,281	4.4%	28.5
BRACBANK	145,338	4.2%	73.0
WALTONHIL	122,859	3.6%	368.7
BATBC	121,716	3.6%	225.4
BEXIMCO	103,850	3.0%	110.1
MARICO	87,183	2.5%	2,767.7
UPGDCL	68,172	2.0%	117.6
BERGERPBL	68,090	2.0%	1,386.6
ISLAMIBANK	57,638	1.7%	35.8
LHB	57,140	1.7%	49.2
BXPBARMA	50,857	1.5%	114.0
CITYBANK	50,048	1.5%	32.9
PUBALIBANK	48,804	1.4%	37.5
RENATA	47,771	1.4%	416.5
EBL	43,566	1.3%	27.3
DUTCHBANGL	41,568	1.2%	43.0
PRIMEBANK	41,067	1.2%	33.7
UNILEVERCL	40,158	1.2%	2,083.5

# DAILY MARKET REVIEW

Tuesday, April 28, 2026

UPCOMING DIVIDENDS							
Ticker	Period	Cash Div	Bonus Div	EPS (BDT)	NAVPS (BDT)	Record Date	AGM Date
PRIMEBANK	FY 2025	25%	5.00%	7.8	40.0	28-Apr-26	21-May-26
LINDEBD	FY 2025	100%	-	22.6	210.3	29-Apr-26	10-Jun-26
SHAHJABANK	FY 2025	13%	-	3.3	23.1	30-Apr-26	24-May-26

TOP BLOCK TRANSACTIONS (DSE)				UPCOMING BOARD MEETING DATE			
Ticker	Volume ('000)	Value (mn)	Price Range	Ticker	Period	Meeting Date	
APEXSPINN	328.7	109.3	311.5 - 353	AMBEEPHA	Q3 2026	29-Apr-25	
RUNNERAUTO	1,350.0	47.9	35.5 - 35.5	ADNTEL	Q3 2026	29-Apr-25	
FINEFOODS	87.3	41.1	450 - 500	MEGCONMILK	Q2 2026	29-Apr-25	
GQBALLPEN	67.4	38.1	555.1 - 596	MEGHNAPEP	Q2 2026	29-Apr-25	
DOMINAGE	367.4	21.9	59 - 60.8	VFSTDL	Q3 2026	29-Apr-25	
NORTHRNINS	647.7	19.3	29.8 - 29.8	JAMUNAOIL	Q3 2026	29-Apr-25	
CITYGENINS	136.3	12.9	91.7 - 108	PREMIERCEM	Q3 2026	29-Apr-25	
NCCBANK	700.0	11.1	15.8 - 15.8	SOUTHEASTB	Q1 2026	29-Apr-25	
ISNLTD	130.7	10.6	81.1 - 81.1	EASTERNINS	FY 2025	29-Apr-25	
ASIATICLAB	69.2	7.1	95.8 - 106	ONEBANKPLC	FY 2025	29-Apr-25	
PTL	90.3	5.5	60 - 69.9	SHASHADNIM	Q3 2026	30-Apr-25	
FEDERALINS	248.2	5.1	20.7 - 20.7	MERCINS	FY 2025	30-Apr-25	
CAPMBDBLMF	400.1	4.8	12.1 - 12.1	APEXSPINN	Q3 2026	30-Apr-25	
SLIPLC	54.0	4.0	73.7 - 73.7	RUPALIBANK	FY 2025	30-Apr-25	
ISLAMIINS	72.6	3.1	42.9 - 42.9	RECKITTEN	FY 2025	30-Apr-25	
KBPPWBIL	49.2	2.2	44.1 - 44.1	MERCINS	FY 2025	30-Apr-25	
ORIONINFU	5.4	1.8	335 - 335				
PROVATIINS	50.0	1.8	36.1 - 36.1				
BNICL	19.9	1.7	86 - 86				
BANKASIA	78.0	1.7	21.5 - 21.5				
CITYBANK	50.0	1.7	33.3 - 33.3				
GLOBALINS	43.0	1.5	34.8 - 34.8				
IBNSINA	4.8	1.4	285 - 285				
MONNOFABR	60.0	1.4	22.5 - 22.8				
AGNISYSL	47.0	1.2	25.8 - 25.8				
APEXFOOT	5.0	1.1	215.8 - 215.8				
LOVELLO	11.4	1.1	93.8 - 93.8				
KAY&QUE	2.4	1.1	443.3 - 443.3				
CRYSTALINS	10.5	0.9	90 - 90				

### SELECTED NEWS IN BRIEF

**TELECOM, STEEL SEEK TAX CUTS AS TOBACCO FIRMS SPLIT OVER GOVT REVENUE POLICY AHEAD OF BUDGET:** The Association of Mobile Telecom Operators of Bangladesh (AMTOB) has proposed abolishing the 20% supplementary duty on mobile talk-time and data, along with other tax cuts, saying the current structure is restricting growth and digital inclusion. In the same meeting, tobacco sector representatives proposed changes to the tax system. British American Tobacco Bangladesh (BATB) proposed replacing the ad-valorem system with a specific tax system. The Bangladesh Steel Manufacturers Association (BSMA) urged the government to reduce income tax, customs duties and VAT on the steel sector in FY2026-27, citing pressure from rising costs, currency depreciation and global instability.

**Source:** <https://www.tbsnews.net/economy/telecom-steel-look-tax-cuts-tobacco-firms-split-over-govt-revenue-policy-ahead-budget>

TOP BLOCK TRANSACTIONS (CSE)			
Ticker	Volume ('000)	Value (mn)	Price Range
KBPPWBI	1,153.6	54.9	44.1 - 53.9
WALTONHIL	56.0	20.1	359 - 359
ONEBANKPLC	2,500.0	16.5	6.6 - 6.6
GQBALLPEN	13.9	8.1	580 - 585
APEXSPINN	18.0	6.0	335 - 335
PTL	47.9	3.0	62 - 63
SLIPLC	26.0	1.9	73.7 - 73.7
CENTRALINS	40.0	1.5	37.2 - 37.2
CITYGENINS	7.5	0.7	93 - 93

### GENERAL DISCLOSURE

**Disclaimer:** This document has been prepared by EBL Securities PLC. (EBLSL) for information only of its clients on the basis of the publicly available information in the market and own research. This document has been prepared for information purpose only and does not solicit any action based on the material contained herein and should not be construed as an offer or solicitation to buy or sell or subscribe to any security. Neither EBLSL nor any of its directors, shareholders, member of the management or employee represents or warrants expressly or impliedly that the information or data of the sources used in the documents are genuine, accurate, complete, authentic and correct. However all reasonable care has been taken to ensure the accuracy of the contents of this document. EBLSL will not take any responsibility for any decisions made by investors based on the information herein.