

# DAILY MARKET REVIEW

Monday, June 30, 2025

## RECENT MARKET MOVEMENT



## DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	4,838	4,840	▼ (1.4)	0.0%	4.3%	-7.2%	-9.2%
DS30	1,816	1,817	▼ (0.5)	0.0%	5.0%	-6.4%	-4.9%
DSMEX (SME)	1,028	1,039	▼ (10.3)	-1.0%	11.0%	-5.8%	-29.3%
Market Cap (BDT bn)	6,623	6,616	▲ 6.3	0.1%	2.4%	0.0%	0.0%
Turnover (BDT mn)	4,645	4,943	▼ (298.1)	-6.0%	87.7%	24.3%	-34.8%
Total Trade	143,264	161,447	▼ (18,183.0)	-11.3%	40.2%	18.5%	4.6%
Volume (mn)	182	223	▼ (40.8)	-18.3%	41.3%	51.9%	25.0%

## CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	8,223	8,244	▼ (20.9)	-0.3%	3.2%	-6.7%	-9.4%
CASPI	13,438	13,480	▼ (41.7)	-0.3%	3.0%	-7.1%	-10.8%
Market Cap (BDT bn)	6,908	6,914	▼ (6.2)	-0.1%	2.4%	-0.8%	-0.1%
Turnover (BDT mn)	258	352	▼ (93.7)	-26.6%	219.0%	514.4%	-95.9%
Total Trade	1,811	2,356	▼ (545.0)	-23.1%	30.3%	-3.1%	-12.8%
Volume ('000)	4,664	5,718	▼ (1,054.1)	-18.4%	113.8%	154.9%	-91.5%

## TODAY'S MARKET COMMENTARY

The benchmark index of the capital bourse snapped its gaining streak of five consecutive sessions today as investors preferred to realize short-term gains due to absence of compelling market-moving catalysts to support longer term holding positions. DSEX, the broad index of the Dhaka Stock Exchange, inched down by 1.4 points or -0.03% to settle at 4,838 points as against 4,840 points in the previous trading session. The trading floor witnessed both buyers and sellers' efforts to control the market momentum amid quarter-end portfolio rebalancing. Despite the trading session beginning with buying pressure driving early gains, selling activity intensified in the mid-session and eroded much of the early gains. However, renewed buyer interest in the final hours of the trading session facilitated a partial recovery, although the benchmark ultimately ended in negative territory. Trading activities also declined today with market turnover decreased by 6.0% to BDT 4.6 billion as against BDT 4.9 billion in the previous session. On the sectoral front, Bank (14.7%) issues exerted the highest turnover, followed by Food (14.2%) and Pharma (12.3%) sectors. Most of the sectors ended in red, out of which Miscellaneous (3.1%), Ceramic (1.5%) and Travel (1.1%) exhibited the most negative returns on the bourse today. Out of the 397 issues traded, 125 advanced, 202 declined and 70 remained unchanged.

The port city bourse also settled on a negative note. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) declined by 20.9 and 41.7 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

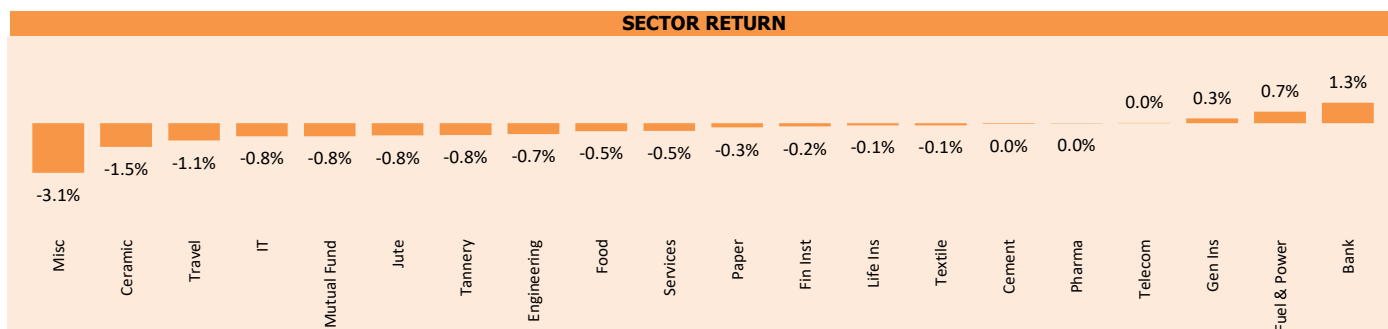
> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

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MARKET VALUATION			SCRIP WISE PERFORMANCE		
	Today	Yday	Advanced	Declined	Unchanged
Market P/NAVPS	1.12	1.12			
Market Fw. P/E <sub>1</sub>	10.91	10.92	↑ 125	↓ 202	▬ 70
Market Fw. P/E <sub>2</sub>	20.56	21.11			

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	681.4	14.7%	634,649	19.3%	12.3	6.2	0.6
Cement	44.4	1.0%	85,763	2.6%	14.1	10.4	1.8
Ceramics	68.8	1.5%	16,495	0.5%	(151.4)	185.1	1.1
Engineering	381.3	8.2%	254,051	7.7%	11.8	12.1	0.8
Financial Institutions	64.4	1.4%	89,898	2.7%	(2.2)	23.3	(1.3)
Food & Allied	660.5	14.2%	262,513	8.0%	14.3	15.9	4.2
Fuel & Power	275.1	5.9%	283,858	8.6%	15.9	7.3	0.6
General Insurance	249.1	5.4%	70,014	2.1%	11.9	11.2	1.0
IT	287.2	6.2%	22,554	0.7%	16.9	16.6	1.3
Jute	14.1	0.3%	2,351	0.1%	(46.8)	31.1	(15.4)
Life Insurance	96.0	2.1%	41,191	1.3%	45.5	n/a	n/a
Miscellaneous	162.0	3.5%	216,489	6.6%	40.0	32.8	1.8
Mutual Fund	161.0	3.5%	28,272	0.9%	(5.8)	33.2	0.6
Paper & Printing	105.5	2.3%	17,836	0.5%	66.9	30.9	0.8
Pharma. & Chemicals	572.4	12.3%	528,344	16.0%	12.7	10.9	1.5
Services & Real Est.	19.1	0.4%	15,758	0.5%	12.5	8.9	0.7
Tannery	72.0	1.6%	20,769	0.6%	45.9	12.7	1.5
Telecommunication	59.7	1.3%	562,519	17.1%	12.5	17.5	3.6
Textile	497.4	10.7%	104,848	3.2%	194.8	11.9	0.7
Travel & Leisure	166.9	3.6%	34,474	1.0%	14.8	21.7	0.3
<b>Equity Market</b>	<b>4,638.3</b>	<b>100.0%</b>	<b>3,292,648</b>	<b>100.0%</b>			



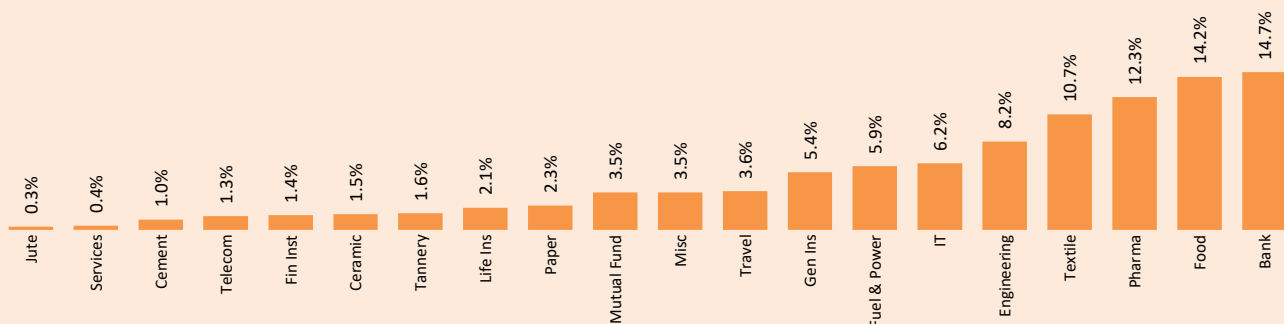
TODAY'S INDEX (DSEX) PULLER <sup>&gt;</sup>				TODAY'S INDEX (DSEX) DRAGGER <sup>&gt;</sup>			
TICKER	%Δ in M.Cap	(+ve Cont.		TICKER	%Δ in M.Cap	(-ve Cont.	
ISLAMIBANK	9.8%	21.4		BATBC	-1.6%	(2.5)	
BRACBANK	0.8%	1.6		WALTONHIL	-1.3%	(2.3)	
ALARABANK	1.8%	1.1		BERGERPBL	-8.1%	(1.2)	
NBL	2.9%	1.0		BXPBARMA	-1.1%	(1.2)	
PUBALIBANK	1.2%	1.0		LOVELLO	-5.2%	(1.1)	
ACI	2.8%	0.9		UCB	-1.0%	(0.5)	
MIDLANDBNK	6.7%	0.9		NCCBANK	-2.0%	(0.5)	
BSCPLC	4.8%	0.9		RENATA	-0.4%	(0.4)	
BANKASIA	1.9%	0.7		KBPPWBIL	-1.5%	(0.4)	
OLYMPIC	0.9%	0.6		JAMUNABANK	-1.1%	(0.4)	

Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;  
 Note: Disclaimer has been annexed at the end of the report.

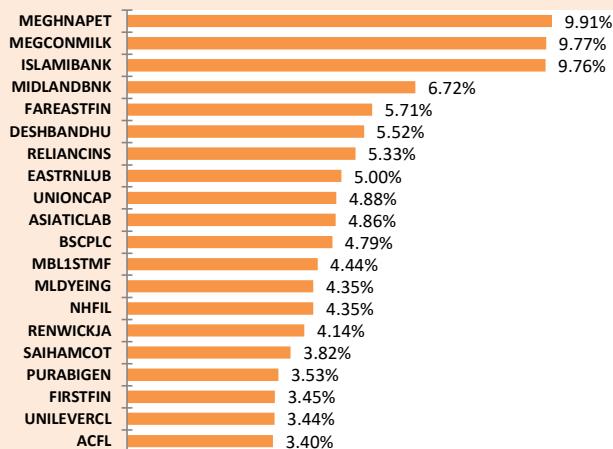
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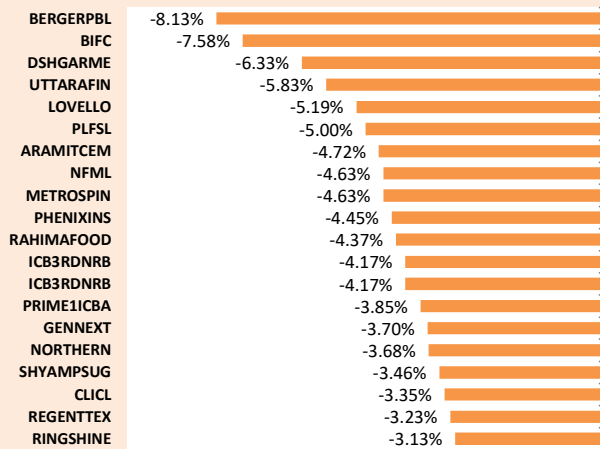
## TURNOVER DISTRIBUTION



## TOP GAINERS\*\*



## TOP LOSERS\*\*



## TOP 20 TURNOVER\* (BDT mn)

TICKER	Turnover	% Turnover	Price
LOVELLO	244.1	5.3%	98.6
AGNISYSL	227.5	4.9%	27.1
MIDLANDBNK	195.4	4.2%	25.4
BRACBANK	157.0	3.4%	50.7
SEAPEARL	150.5	3.2%	54.2
BEACHHATCH	131.7	2.8%	48.3
ASIATICLAB	127.0	2.7%	38.8
SQRPHARMA	125.0	2.7%	208.9
EASTRNLUB	98.4	2.1%	2666.2
CENTRALINS	97.0	2.1%	39.0
FINEFOODS	81.3	1.8%	236.8
MLDYEING	69.5	1.5%	9.6
ISLAMIBANK	64.5	1.4%	40.5
KBPPWBIL	63.0	1.4%	110.7
BATBC	60.1	1.3%	280.5
DSSL	59.9	1.3%	10.3
NLTUBES	59.7	1.3%	88.3
AIL	56.8	1.2%	46.0
LEGACYFOOT	55.6	1.2%	59.7
IBP	53.8	1.2%	13.1

## TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	409,276	12.4%	303.1
SQRPHARMA	185,180	5.6%	208.9
BATBC	151,470	4.6%	280.5
ROBI	129,901	3.9%	24.8
WALTONHIL	123,080	3.7%	406.3
BEXIMCO	103,575	3.1%	110.1
BRACBANK	100,940	3.1%	50.7
MARICO	76,328	2.3%	2,423.1
BERGERPBL	73,996	2.2%	1,595.5
UPGDCL	69,911	2.1%	120.6
ISLAMIBANK	65,205	2.0%	40.5
RENATA	56,018	1.7%	488.4
LHB	55,165	1.7%	47.5
UNILEVERCL	46,862	1.4%	2,431.3
ICB	39,634	1.2%	45.7
BXPHARMA	38,410	1.2%	86.1
DUTCHBANGL	38,281	1.2%	39.6
EBL	36,544	1.1%	22.9
PUBALIBANK	33,056	1.0%	25.4
OLYMPIC	30,691	0.9%	153.5

