

## DSEX WENT DOWN BY 44.2 POINTS

Market closed negative today with increase in turnover.

Broad index DSEX went down by 44.2 points.

Paper & Printing, Ceramics and Mutual Fund are the top three sectors that closed positive today while Travel & Leisure, Bank and Cement are the top three sectors that closed negative today.

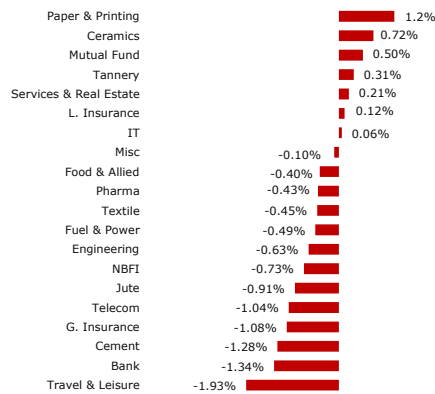
Turnover increased by 7.1% to BDT 6,464mn (USD 53mn).

Pharma sector dominated the turnover chart covering 17.7% of the total turnover.

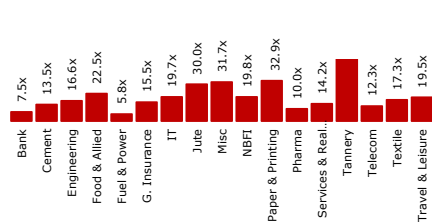
### Intraday Performance of DSEX



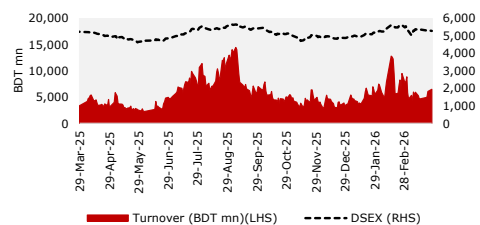
### Sector Return



### Sector P/E



### 52 Week Daily Turnover & DSEX



### Index

Particulars	Value	Δ Points	Daily Δ %	Dec'25 Value	YTD Δ %
DSEX	5,272.07	(44.2)	-0.83%	4,865.34	8.36%
DS30	1,998.39	(21.3)	-1.06%	1,853.54	7.81%
DSES	1,066.11	(7.5)	-0.70%	1,000.72	6.53%
S&P 500	6,368.85	(108.3)	-1.67%	6,845.50	-6.96%
Nikkei 225	53,373.07	(230.6)	-0.43%	50,339.48	6.03%
FTSE 100	9,967.35	(4.8)	-0.05%	9,931.38	0.36%

### Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	6,464	6,038	426	7.06%	5,872
Turnover (USD mn)	53	49	3	7.06%	48
Volume (mn)	310	360	-50	-13.76%	219
Market Cap (BDT bn)	6,949	6,982	-33	-0.47%	
Market Cap (USD bn)	57	57	0	-0.47%	
Market P/E (x)	10.9				
<b>Particulars</b>	<b>Gainer</b>	<b>Loser</b>	<b>Unchanged</b>		
Market Breadth	114	250	30		

### Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	732,927	21.58%	-1.3%	639.2	9.89%
Pharma	559,509	16.48%	-0.4%	1,147.0	17.74%
Telecom	514,025	15.14%	-1.0%	113.4	1.75%
Fuel & Power	277,056	8.16%	-0.5%	206.4	3.19%
Engineering	271,347	7.99%	-0.6%	836.6	12.94%
Food & Allied	229,546	6.76%	-0.4%	561.1	8.68%
Misc	219,000	6.45%	-0.1%	341.0	5.27%
Textile	118,214	3.48%	-0.4%	510.6	7.90%
NBFI	95,569	2.81%	-0.7%	134.0	2.07%
Cement	93,049	2.74%	-1.3%	63.7	0.99%
G. Insurance	88,794	2.61%	-1.1%	277.0	4.29%
L. Insurance	50,050	1.47%	0.1%	282.0	4.36%
Travel & Leisure	33,255	0.98%	-1.9%	130.4	2.02%
Mutual Fund	26,692	0.79%	0.5%	338.5	5.24%
IT	25,000	0.74%	0.1%	242.6	3.75%
Services & Real Estate	23,094	0.68%	0.2%	187.2	2.90%
Tannery	22,288	0.66%	0.3%	65.4	1.01%
Paper & Printing	21,637	0.64%	1.2%	202.7	3.14%

### Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ACMEPL	20.30	5.73%	237.65	12.13	n/a
ORIONINFU	343.00	-4.62%	235.37	0.67	153.91
BDTHAIFOOD	18.80	9.30%	173.28	9.54	n/a
SAPORTL	48.70	0.00%	172.61	3.60	25.83
TECHNODRUG	33.00	8.91%	132.66	4.11	17.07

### Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BDAUTOCA	185.10	9.92%	93.79	0.52	1,610.00
FASFIN	3.50	9.38%	4.47	1.28	n/a
BDTHAIFOOD	18.80	9.30%	173.28	9.54	n/a
FAREASTFIN	3.60	9.09%	10.65	2.96	n/a
PHPMF1	3.60	9.09%	30.41	8.68	n/a

### Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PRIMETEX	19.00	-6.86%	5.17	0.27	n/a
SEAPPEARL	38.70	-5.15%	98.82	2.50	n/a
ORIONINFU	343.00	-4.62%	235.37	0.67	153.91
ICBAGRAN11	6.60	-4.35%	0.67	0.10	8.85
PHOENIXFIN	4.50	-4.26%	1.72	0.37	n/a

## RUNNERAUTO

### Company Response to DSE Query on MSMA with BYD China

Refer to the earlier news disseminated by DSE on March 24, 2026 regarding the Board's approval of a Master Supply and Manufacturing Agreement with BYD China, DSE subsequently made a query to the company and requested to provide the copy of the agreement along with the probable financial impact of the said agreement. In response, the company, vide its letter dated March 25, 2026, has informed, among others the following: "The MSMA serves as the primary framework agreement governing the CKD manufacturing arrangement and is currently being used as the basis for assessing the overall investment feasibility, implementation timeline, and projected financial outcomes of the project. It is important to note that, as per the structure of the arrangement, separate Technical License Agreements (TLA) will be executed for each individual vehicle model. The detailed commercial, operational, and financial parameters will be further defined under those model-specific agreements. The agreement was signed during a BYD conference held in Shenzhen, China on March 20, 2026. However, the MSMA is currently under process for completion of the remaining legal formalities from BYD's end, which is expected to take approximately 5-6 working days. The signed copy will be shared upon completion of these formalities and receipt from BYD. Accordingly, the final investment size, financial projections, and related outcomes are currently under evaluation and are subject to confirmation from both the supplier (BYD) and the Board of Directors of Runner Automobiles PLC. We will update the financial impact, investment details, and other relevant disclosures on a timely basis as and when the same are finalized and approved."

## Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ACIFORMULA	145.6	145.6	1	4850	0.706
ACMEPL	19.3	19.2	3	283000	5.441
AL-HAJTEX	125	125	1	5000	0.625
ALARABANK	15.6	15.6	5	5455566	85.107
ARGONDENIM	18.3	18.3	1	27475	0.503
ASIATICLAB	70	70	3	230000	16.1
BDAUTOCA	175.1	162.4	4	24610	4.181
BDFINANCE	15.3	15.3	1	33000	0.505
BSC	111.7	111.7	1	35000	3.909
CENTRALINS	41.5	41.5	1	54300	2.253
CITYGENINS	96.5	96.2	2	17500	1.687
CLICL	60.7	60.5	7	224950	13.623
CRYSTALINS	81.9	81.9	1	110000	9.009
DOMINAGE	40	37.6	3	58853	2.274
FEKDIL	14.2	14.2	2	331000	4.7
FINEFOODS	450.5	450.5	1	4507	2.03
QBALLPEN	512	500.1	3	57113	28.982
HAKKANIPUL	74.2	74.1	5	162793	12.079
HAMI	155	152.8	2	11300	1.734
IPDC	19.6	19.6	1	44000	0.862
KAY&QUE	468	468	1	1085	0.508
KBPPWBIL	45.1	45.1	1	200000	9.02
LOVELLO	65	65	1	30003	1.95
MIDLANDBNK	17.8	17.8	1	560000	9.968
MONNOCERA	90.3	90.3	1	5582	0.504
NAHEEACP	24.3	24.3	1	38600	0.938
ORIONINFU	362	357.8	2	13500	4.87
PADMAOIL	178	178	1	7313	1.302
PRAGATIINS	76	76	1	10000	0.76
PRAGATILIF	231	231	1	6600	1.525
PTL	54.9	53	2	195277	10.367
PUBALIBANK	41.1	41.1	1	19500	0.801
ROBI	32.5	32.5	1	50000	1.625
RUNNERAUTO	43.4	43	2	75000	3.235
SAIHAMCOT	19.4	19	3.0	400000	7.7
SALVO	28.2	28.2	1	17731	0.5
SAPORTL	47	47	3	1240000	58.28
SILVAPHL	10	10	1	53102	0.531
SIMTEX	24.5	24.5	1	60000	1.47
SONALIPAPR	238.2	238.2	1	5950	1.417
SPCL	53.3	51.3	2	110600	5.874
SUNLIFEINS	56.4	56.3	2	26000	1.465
TECHNODRUG	30.5	30.5	1	20000	0.61
UTTARABANK	23	23	1	100000	2.3

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We calculate our target price by weighting DCF, DDM, SOTP, asset-based and other relative valuation methods, and applying appropriate premiums/ discounts and/or other relevant adjustments.

Expected absolute returns are calculated as the % of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

Recommendation Type	Holding period (if not otherwise mentioned)	Absolute Return Potential
Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between -5% and +15%
Underweight	12 Months	Less than -5%

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#### Head Office

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#### Extensions of Head Office

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<b>Bashundhara</b> +880 1718 106 217	<b>Mirpur-1</b> +880 1713 205 723	<b>Mirpur-12</b> +880 1911 197 188	<b>Banasree</b> +880 1701 205 075	<b>Uttara</b> +880 1913 128 156

#### Branch Offices

<b>Chattogram</b> +880 1701 205 038	<b>Sylhet</b> +880 1713 205 760
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#### Digital Booths

<b>Khulna</b> +880 1717 411 466	<b>Barishal</b> +880 1713 205 762	<b>Cumilla</b> +880 1324 243 163	<b>Jashore</b> +880 1324 243 203	<b>Gazipur</b> +880 1324 243 165
<b>Feni</b> +880 1324 243 210	<b>Khatungonj</b> +880 1713 205 742	<b>Chawkbazar</b> +880 1817 206 965	<b>Madhobdi</b> +880 1324 243 156	
	<b>Narayangonj</b> +880 1324 243 207	<b>Agrabad</b> +880 1324 243 198		