



Market Commentary	DSEX Movement
<p>Bank Stock Profit-Taking Pressure Trigger Market Downside; Selective Buying Persists The DSEX index declined by 18.86 points or 0.36% to close at 5248.37, while turnover fell by 7.76% to BDT 7676.83 Mn. Market breadth weakened to 0.50x, signaling broad-based distribution.</p> <p>The market movement was largely influenced by profit-taking pressure as well as by post-record date adjustments in bank stocks following their recent earnings-positioning driven rally. However, investors demonstrated selective opportunistic buying interest in small-and mid-cap stocks, particularly within the textile sector.</p> <p>Sector returns are broadly negative, with Financial Institutions (-1.45%) being the worst underperformer. Turnover remained skewed towards the Textile (15.09%), Pharmaceuticals & Chemicals (14.81%), and Engineering (14.39%) sectors.</p> <p>Looking ahead, market direction is likely to remain sensitive to developments surrounding capital market regulatory leadership, alongside ongoing geopolitical dynamics related to the Iran-US tensions.</p>	

DSE Performance Snapshot											
Indices	Today	Yesterday	Change (+/-)	Change (%)	Liquidity	Today	Yesterday	Change (+/-)	Change (%)		
DSEX Index	5,248.37	5,267.23	▼ -18.86	▼ -0.36%	Turnover (BDT Mn)	7,676.83	8,322.94	▼ -646.11	▼ -7.76%		
DS30 Index	2,009.09	2,017.16	▼ -8.08	▼ -0.40%	Volume (Shares Mn)	247.28	265.86	▼ -18.58	▼ -6.99%		
DSES Index	1,058.51	1,060.44	▼ -1.92	▼ -0.18%	Trade (Shares)	210,728	218,863	▼ -8,135.00	▼ -3.72%		
Valuation		Today	Yesterday	Change (+/-)	Change (%)	Breadth		Advanced	Declined	Unchanged	A/D Ratio (x)
Market Cap (BDT Bn)		6,799.08	6,803.07	▼ -3.99	▼ -0.06%	No of Issues		107	212	72	0.50x
Forward P/E (x)		9.19x	9.22x	▼ -0.03	▼ -0.28%						
Trailing P/E (x)		9.03x	9.06x	▼ -0.03	▼ -0.30%						

DSE SME Board Performance Snapshot										
Indices	Today	Yesterday	Change (+/-)	Change (%)	Liquidity	Today	Yesterday	Change (+/-)	Change (%)	
DSMEX Index	1,165.75	1,162.32	▲ 3.4	▲ 0.3%	Turnover (BDT Mn)	89.43	117.60	▼ -28.17	▼ -23.95%	
						Volume (Shares Mn)	2.37	3.45	▼ -1.08	▼ -31.42%
						Trade (Shares)	1,997	2,792	▼ -795.00	▼ -28.47%

DSE Sectoral Summary											
Sector	Market Cap (BDT Mn)	Change (%)	Market Cap Share (%)	Turnover (BDT Mn)	Change (%)	Turnover Share (%)	Index Impact (+/-)	A/D Ratio (x)	Forward P/E (x)	Trailing P/E (x)	
Bank	686,022.01	▼ -0.52%	20.4%	743.60	▼ -39.69%	10.1%	▼ -9.10	0.18x	6.18x	5.93x	
Cement	87,185.29	▼ -0.55%	2.6%	43.11	▼ -9.66%	0.6%	▼ -0.80	0.17x	13.32x	13.35x	
Ceramics	19,091.89	▲ 1.26%	0.6%	443.50	▲ 18.27%	6.0%	▲ 0.73	0.25x	1,374.65x	n/a	
Engineering	273,853.72	▼ -0.18%	8.2%	1,058.05	▼ -1.70%	14.4%	▼ -0.72	0.54x	12.58x	11.60x	
Financial Institutions	87,516.62	▼ -1.45%	2.6%	66.21	▲ 0.33%	0.9%	▼ -1.53	0.00x	16.96x	19.23x	
Food & Allied	226,675.25	▼ -0.21%	6.7%	461.92	▲ 7.39%	6.3%	▲ 0.32	0.40x	23.76x	24.62x	
Fuel & Power	272,558.02	▼ -0.70%	8.1%	267.30	▼ -27.81%	3.6%	▼ -1.68	0.33x	6.16x	7.06x	
Insurance	148,270.95	▼ -1.30%	4.4%	756.72	▼ -18.10%	10.3%	▼ -3.88	0.26x	19.26x	24.12x	
IT	27,496.73	▲ 0.01%	0.8%	235.33	▲ 11.76%	3.2%	▼ -0.03	0.25x	21.98x	27.90x	
Jute	2,446.02	▼ -0.70%	0.1%	9.32	▼ -47.02%	0.1%	▼ -0.04	0.00x	30.09x	24.56x	
Miscellaneous	213,643.31	▲ 0.09%	6.4%	446.04	▲ 11.12%	6.1%	▲ 0.36	2.00x	31.57x	30.25x	
Mutual Fund	25,008.78	▼ -0.29%	0.7%	95.76	▼ -11.07%	1.3%	▲ 0.00	0.63x	18.34x	47.53x	
Paper & Printing	21,005.38	▼ -0.72%	0.6%	181.71	▼ -2.52%	2.5%	▼ -0.17	0.50x	39.00x	47.23x	
Pharmaceuticals & Chemicals	563,106.31	▼ -0.29%	16.8%	1,089.00	▼ -15.03%	14.8%	▼ -3.80	0.76x	10.54x	11.28x	
Services & Real Estate	23,136.65	▼ -0.88%	0.7%	75.39	▼ -3.58%	1.0%	▼ -0.35	0.00x	14.22x	14.33x	
Tannery	23,195.78	▲ 0.02%	0.7%	157.04	▼ -3.67%	2.1%	▼ -0.18	0.50x	174.55x	120.37x	
Telecommunication	506,860.40	▼ -0.10%	15.1%	73.49	▼ -37.89%	1.0%	▼ -0.16	1.00x	14.14x	12.13x	
Textile	121,387.51	▲ 1.49%	3.6%	1,109.85	▲ 29.48%	15.1%	▲ 3.49	2.54x	19.04x	18.53x	
Travel & Leisure	31,511.99	▼ -0.71%	0.9%	39.18	▼ -37.76%	0.5%	▼ -0.37	0.00x	20.64x	14.68x	



Daily Top Gainers						Daily DSEX Pullers						
Ticker	Close Price (BDT)	Change (%)	Turnover (BDT Mn)	Change (%)	Forward P/E (x)	Trailing P/E (x)	Ticker	Close Price (BDT)	Change (%)	Index Weight (%)	Index Impact (+)	
MONNOCERA (B)	104.20	▲ 9.68%	389.75	▲ 47.56%	325.63x	n/a	MONNOCERA(B)	104.20	▲ 9.68%	0.2%	0.90	
YPL (Z)	22.70	▲ 9.66%	20.47	▲ 47.89%	n/a	n/a	n/a	FINEFOODS(A)	550.20	▲ 3.27%	0.5%	0.78
MHSM (B)	23.90	▲ 9.63%	122.69	▲ 130.40%	22.13x	28.80x	SHAHJABANK(A)	15.80	▲ 1.94%	0.7%	0.71	
SILCOPH (B)	16.00	▲ 8.11%	64.53	▲ 285.63%	37.50x	48.48x	JHRML(A)	50.90	▲ 4.30%	0.3%	0.67	
SICL (B)	31.70	▲ 7.46%	56.41	▲ 40.40%	37.74x	27.81x	MALEKSPIN(A)	29.50	▲ 5.73%	0.2%	0.61	
ALLTEX (Z)	17.40	▲ 7.41%	21.76	▲ 39.22%	435.00x	n/a	BSRMSTEEL(A)	72.90	▲ 1.82%	0.5%	0.51	
REGENTTEX (Z)	4.40	▲ 7.32%	2.43	▲ 100.08%	n/a	n/a	OLYMPIC(A)	143.90	▲ 0.70%	1.3%	0.49	
APEXSPINN (A)	354.70	▲ 7.29%	63.26	▼ -8.52%	103.92x	112.96x	MHSM(B)	23.90	▲ 9.63%	0.1%	0.48	
SAIHAMTEX (B)	19.80	▲ 6.45%	74.35	▲ 291.02%	29.12x	31.43x	ACI(A)	190.90	▲ 1.38%	0.6%	0.45	
TECHNODRUG (A)	40.20	▲ 5.79%	213.77	▲ 169.51%	25.55x	26.27x	TECHNODRUG(A)	40.20	▲ 5.79%	0.1%	0.41	

Daily Top Losers						Daily DSEX Draggers						
Ticker	Close Price (BDT)	Change(%)	Turnover (BDT Mn)	Chnage(%)	Forward P/E (x)	Trailing P/E (x)	Ticker	Close Price (BDT)	Change (%)	Index Weight (%)	Index Impact (-)	
FAREASTFIN(Z)	2.10	▼ -8.70%	1.24	▲ 69.07%	n/a	n/a	n/a	BXPBARMA(A)	123.90	▼ -1.67%	2.8%	(2.45)
PREMIERLEA(Z)	2.10	▼ -8.70%	2.92	▲ 148.59%	n/a	n/a	n/a	CITYBANK(A)	27.00	▼ -1.82%	2.1%	(1.99)
ILFSL(Z)	2.10	▼ -8.70%	1.54	▲ 241.78%	n/a	n/a	n/a	ASIATICLAB(A)	106.00	▼ -4.33%	0.6%	(1.31)
UNITEDINS(A)	42.40	▼ -7.42%	16.92	▲ 254.21%	44.17x	13.05x	ISLAMIBANK(Z)	32.60	▼ -0.61%	3.8%	(1.21)	
BIFC(Z)	4.30	▼ -6.52%	0.22	▼ -84.56%	n/a	n/a	n/a	JAMUNABANK(A)	25.10	▼ -1.95%	1.0%	(1.04)
HFL(Z)	12.60	▼ -5.97%	3.95	▲ 49.30%	n/a	n/a	n/a	BANKASIA(A)	19.50	▼ -2.01%	0.9%	(0.95)
PRIMEFIN(Z)	3.40	▼ -5.56%	1.88	▲ 152.75%	n/a	n/a	n/a	BEACONPHAR(A)	104.30	▼ -1.70%	1.0%	(0.94)
BDWELDING(Z)	13.90	▼ -4.79%	2.58	▲ 424.80%	n/a	n/a	n/a	WALTONHIL(A)	359.30	▼ -0.58%	2.8%	(0.86)
TAKAFULINS(A)	31.40	▼ -4.56%	3.81	▲ 352.19%	13.08x	22.27x	POWERGRID(Z)	31.30	▼ -3.40%	0.4%	(0.74)	
KPPL(Z)	15.20	▼ -4.40%	7.00	▼ -63.77%	n/a	n/a	n/a	NCCBANK(A)	16.50	▼ -1.79%	0.8%	(0.73)

Sheltech Brokerage Limited
Daily Market Wrap
 May 6, 2026



Daily Turnover Leaders							Daily Block Turnover Leaders				
Ticker	Turnover (BDT Mn)	Change(%)	Turnover Share (%)	Block Turnover (BDT Mn)	Close Price (BDT)	Change(%)	Ticker	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Volume (Shares)
MONNOCERA(B)	389.75 ▲	47.56%	3.3%	0.00	104.20 ▲	9.68%	NCCBANK (A)	18.40	15.30	72.24	3.97
DOMINAGE(B)	327.23 ▲	32.58%	3.1%	20.00	71.50 ▲	1.71%	FINEFOODS (B)	530.00	500.00	34.63	0.07
MALEKSPIN(A)	219.62 ▲	194.44%	0.9%	0.00	29.50 ▲	5.73%	SAIHAMCOT (B)	22.50	19.50	34.26	1.53
TECHNODRUG(A)	213.77 ▲	169.51%	1.0%	4.23	40.20 ▲	5.79%	MHSMZ (Z)	23.20	21.50	31.75	1.43
GQBALLPEN(B)	208.97 ▲	160.77%	1.0%	14.97	665.80 ▲	2.15%	DOMINAGE (B)	66.00	66.00	20.00	0.30
LOVELLO(A)	197.20 ▲	34.87%	1.8%	19.44	80.20 ▼	-1.96%	LOVELLO (Z)	87.90	79.00	19.44	0.22
CITYBANK(A)	174.97 ▼	-33.46%	3.3%	0.00	27.00 ▼	-1.82%	ASIATICLAB (A)	103.00	103.00	17.51	0.17
BXPHARMA(A)	167.34 ▼	-56.13%	4.8%	0.00	123.90 ▼	-1.67%	CITYGENINS (B)	97.00	92.00	15.97	0.17
UTTARABANK(A)	155.04 ▲	7.59%	1.8%	0.00	26.00 ▼	0.00%	GQBALLPEN (Z)	625.10	610.00	14.97	0.02
MIRAKHTER(A)	133.06 ▼	-15.22%	2.0%	0.00	41.20 ▼	-0.96%	DAFODILCOM (A)	122.00	120.00	10.68	0.09

Note: Returns are dividend-adjusted.

Regional Peer Market Indices Performance							Important News
Indices	Country	Today	Yesterday	Change (+/-)	Change (%)		
S&P BSE SENSEX	India	77,157.77	77,041.42 ▲	116.35 ▲	0.15%	EASTERNINS: Board Meeting schedule under LR 16(1): As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on May 13, 2026, at 3:30 pm to consider, among others, Unaudited Financial Statements for the First Quarter (Q1) period ended March 31, 2026. NCCBANK: Board Meeting schedule under LR 16(1) As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on May 13, 2026, at 2:30 pm to consider, among others, Unaudited Financial Statements for the First Quarter (Q1) period ended March 31, 2026. BRACBANK: Board Meeting schedule under LR 16(1): As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on May 12, 2026, at 3:00 pm to consider, among others, Unaudited Financial Statements for the First Quarter (Q1) period ended March 31, 2026.	
KSE 100	Pakistan	168,628.27	163,528.06 ▲	5100.21 ▲	3.12%		
ASPI	Sri Lanka	168,628.27	22,602.93 ▲	146025.34 ▲	646.05%		
FTSE Bursa Malaysia KLCI	Malaysia	1,759.53	1,745.62 ▲	13.91 ▲	0.80%		
IDX COMPOSITE	Indonesia	7,077.85	7,053.29 ▲	24.56 ▲	0.35%		
SET Index	Thailand	1,514.47	1,486.04 ▲	28.43 ▲	1.91%		
VN-Index	Vietnam	1,891.24	1,873.31 ▲	17.93 ▲	0.96%		

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