WEEKLY MARKET REVIEW

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Macroeconomic Snapshot

Major Economic Indicators Overview

Indicator	Date	Amount
Foreign Exchange Reserve (mn US$)	04-Jun-26	34.79
Foreign Exchange Reserve (BPM6, mn US$)	04-Jun-26	26.06
Inflation (Point to Point Basis)	May, 26	9.42%
GDP Growth Rate	FY 26 (Q2)	3.03%

Money Market:

Indicator	Date	Amount
Call Money Rate	11-Jun-26	9.89
REPO Rate (Interest Rate)	23-Dec-25	10.00
91-Day T-bills Rate	11-May-26	10.19
10-Year T-bonds Rate	22-April-26	10.98
W. Avg. Deposits Interest Rate	Feb-26	6.31
W. Avg. Advances Interest Rate	Feb -26	11.96

Exchange Rates (BDT):

Currency	Buy	Sell
USD	122.75	122.75
EURO	141.59	141.60
GBP	164.06	164.14

Commodity Price Overview:

Commodity Name	12 Jun 26	05 Jun 26	Change(%)
Gold (per ounce)	4219.40	4328.87	(4.65)
Oil (per barrel)	84.88	90.24	2.84
Natural Gas (per MM Btu)	3.12	3.22	5.92
Cotton (per pound)	76.42	77.48	1.75

Bangladesh's economy is currently in a tight monetary and low-growth phase, with GDP growth slowing to 3.03% in Q2 FY26, reflecting weak private sector activity and credit constraints. Inflation remains elevated at 9.42%, while high policy rates (repo 10%) and elevated money market yields continue to suppress borrowing and investment demand. Foreign exchange reserves remain stable but slightly lower at ~US$34.79bn, supporting short-term currency stability despite external pressure. Commodity trends are mixed: oil and gas prices rose, adding inflation risk, while gold declined and cotton showed mild strength. Overall, the economy is in a stability-versus-growth trade-off, where tight policy ensures macro stability but continues to restrain growth momentum and credit expansion.

.*Secondary Market Overview*

The secondary market closed the week on a mildly bullish note, with all major indices advancing. DSEX rose to 5,520.40 (0.83%), while DSES and DS30 also edged higher, indicating continued positive sentiment across both broad and blue-chip segments. Market liquidity improved further, with average turnover increasing to BDT 1,287.62 crore (11.40%), alongside higher trade count (8.10%), reflecting stronger participation from investors. Trading activity remained highly selective and concentrated, with momentum largely driven by small- and mid-cap stocks, particularly in insurance, IT, engineering, and services-related names. On the other hand, pressure persisted in distressed financial and NBFI stocks, with notable declines in several heavily sold counters, while banking stocks delivered mixed performance. Overall, the market reflected a liquidity-supported, stock-specific rally with sector rotation, speculative participation in lower caps, and cautious profit-taking in legacy financial segments.

Related Regulatory Highlights

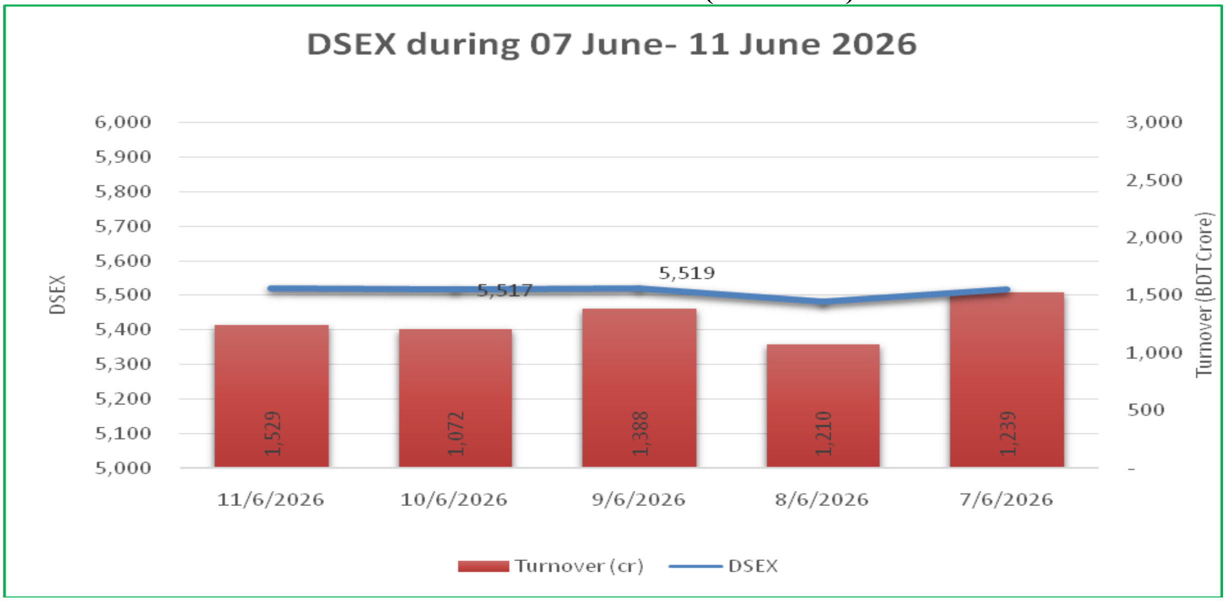
1. BB institutionalized a highly secured, extranet-based digital communications network framework to manage financial data clearing, settlement, and API exchanges.
2. BSEC formally published the draft "Bangladesh Securities and Exchange Commission (Corporate Governance) Rules, 2026", inviting market stakeholders and corporate analysts to submit final opinions before legal implementation.

Indices	This Week (11.06.26)	Last Week (04.06.26)	Point Change	Change(%)
DSEX	5520.40	5475.00	45.40	0.83
DSES	1114.65	1108.98	5.67	0.51
DS30	2072.91	2068.34	4.75	0.22

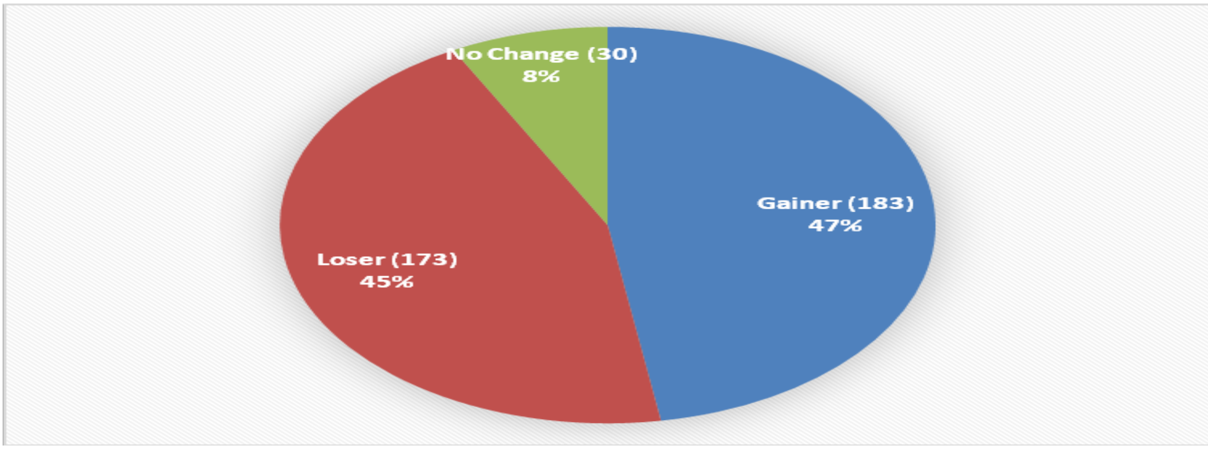
Market Aggregates	This Week	Last Week	Change(%)
Avg. Turnover (cr)	1287.62	1155.88	11.40
Avg. No. of Trade	307,572	284,570	8.10
Avg. Volume (cr)	39.69	38.82	2.24
Avg. Mkt. Cap. (Cr)	690,010	692,976	(0.43)

The DSE ended the week on a mildly positive but stable tone, with DSEX rising 0.83% to 5,520.40, while DSES (0.51%) and DS30 (0.22%) also posted small gains, showing gradual upward movement across the board. Market activity improved further as average turnover increased 11.40% to Tk. 1,287.62 crore, along with higher trade count 8.10% and volume 2.24%, indicating steady investor participation. However, market capitalization slightly declined (-0.43%), suggesting some valuation pressure despite active trading.

DSEX Index and Turnover (BDT crore):



DSE: Gainer Loser Statistics:



Equity Market Performance of Bangladesh and peer Countries:

Indices	This Week	Last Week	Change(%)
Bangladesh (DSEX)	5520.40	5475.00	0.83
Pakistan (KSE 100)	172399.90	170478.94	1.13
Sri Lanka (CSE-All share)	21637.43	21744.13	(0.49)
Vietnam (VNI)	1791.65	1838.90	(2.57)
India (S & P BSE SENSEX)	75527.95	74243.34	1.73

Top Gainers			
SL	Ticker	Closing Price (Tk.) 11.06.2026	Return %
1	SHYAMPSUG	238.90	41.28
2	MERCINS	39.20	28.52
3	PARAMOUNT	65.90	25.52
4	DGIC	29.80	23.14
5	IPDC	23.70	22.8
6	SONARGAON	79.20	21.29
7	SIPLC	102.00	20.57
8	SAPORTL	58.80	19.76
9	DULAMIACOT	171.60	18.59
10	SJIBLPBOND	6061.00	18.38

Top Losers			
SL	Ticker	Closing Price (Tk.) 11.06.2026	Return %
1	BEXIMCO	80.30	(27.07)
2	PLFSL	1.30	(18.75)
3	FAREASTFIN	1.30	(18.75)
4	MEGCONMILK	39.30	(16.03)
5	FASFIN	1.40	(12.50)
6	EMERALDOIL	22.00	(11.29)
7	ISLAMIBANK	29.10	(10.74)
8	MEGHNAPET	81.30	(10.56)
9	PRIMETEX	18.10	(9.95)
10	BENGALWTL	24.80	(9.16)

Turnover Leaders			
SL	Ticker	Closing Price(Tk.) 11.06.2026	Average Turnover (mm)
1	NCCBANK	16.30	278.49
2	DOMINAGE	80.70	269.34
3	IPDC	23.70	227.25
4	SUNLIFEINS	79.00	209.06
5	SAPORTL	58.80	206.94
6	ANWARGALV	121.10	193.18
7	GENEXIL	35.10	189.48
8	PEOPLESINS	61.10	176.79
9	ASIATICLAB	124.80	174.95
10	BDTHAIFOOD	28.50	172.41

TOP BLOCK TRADE STOCKS			
SL	Ticker	Closing Price (Tk.) 11.06.2026	Turnover (mm)
1	CITYGENINS	106.20	466.40
2	APEXSPINN	352.60	172.33
3	DOMINAGE	80.70	143.64
4	SONARGAON	79.20	131.54
5	EBL	24.40	122.95
6	SUNLIFEINS	79.00	121.46
7	ASIATICLAB	124.80	108.16
8	BEXIMCO	80.30	83.57
9	BNICL	105.70	71.58
10	MEGHNAPET	81.30	70.17

SL	Lowest PE Ratio Stocks		
	Ticker	Closing Price (Tk.) 11.06.2026	P/E
1	SOUTHEASTB	9.80	2.47
2	NEWLINE	5.50	2.58
3	SHURWID	6.80	2.7
4	JAMUNABANK	23.70	3.05
5	PADMAOIL	182.00	3.1
6	NCCBANK	16.30	3.67
7	MPETROLEUM	209.10	3.78
8	SHAHJABANK	17.30	3.86
9	DUTCHBANGL	41.80	3.87
10	UTTARABANK	21.10	4.00

SL	Highest Dividend Yield Stocks		
	Ticker	Closing Price (Tk.) 11.06.2026	Yield (%)
1	JAMUNABANK	23.70	12.24
2	UTTARAFIN	13.40	11.19
3	NCCBANK	16.30	10.43
4	JAMUNAOIL	174.90	10.29
5	EBL	24.40	10.25
6	MPETROLEUM	209.10	9.56
7	PADMAOIL	182.00	8.79
8	GP	247.80	8.68
9	DHAKABANK	11.70	8.55
10	PRIMEBANK	29.50	8.47

Market showed selective bullish momentum with strong gains in small and mid-cap stocks like SHYAMPSUG, SONARGAON, PARAMOUNT, DGIC, and IPDC. Weakness was seen in large distressed financial stocks such as BEXIMCO, PLFSL, FAREASTFIN, and FASFIN due to continued selling pressure. Liquidity remained highly concentrated in active stocks like NCCBANK, DOMINAGE, IPDC, SUNLIFEINS, and SAPORTL. Strong block trades in CITYGENINS, SONARGAON, ASIATICLAB, and EBL indicated ongoing institutional participation. Banking sector showed mixed performance, while NBFIs and some financial stocks remained under pressure.

Sector Performance

Sector	Return %	Turnover %	Volume %	P/E
Bank	-0.20%	7.60%	-19.84%	5.70
Cement	-1.20%	1.60%	15.63%	16.20
Ceramics	6.50%	2.10%	-9.77%	415.70
Engineering	0.20%	12.90%	-31.62%	13.40
Financial Institutions	4.50%	3.60%	-9.02%	21.50
Food & Allied	-0.30%	6.20%	132.56%	18.90
Fuel & Power	1.00%	3.60%	-8.30%	6.50
General Insurance	6.20%	19.30%	3.43%	16.20
IT	1.30%	5.10%	115.49%	24.60
Jute	-1.90%	0.10%	-15.39%	32.80
Life Insurance	4.40%	5.60%	-22.63%	n/a
Miscellaneous	-11.90%	3.60%	68.78%	29.50
Mutual Fund	0.10%	1.20%	-1.57%	19.40
Paper & Printing	-1.50%	2.00%	16.26%	41.20
Pharma & Chemicals	0.40%	10.50%	5.73%	10.90
Services & Real Estate	7.80%	2.30%	-3.87%	15.60
Tannery	0.80%	1.10%	60.65%	15.20
Telecommunication	1.60%	1.30%	7.84%	13.80
Textile	0.70%	9.70%	17.04%	20.20
Travel & Leisure	-2.30%	0.80%	-6.90%	23.20

Corporate Declaration

This Week	
Ticker	**Disclosure**

This Week		
Disclosure		
Ticker	**Board Meeting**	**Record Date**
CONTININS	15-Jun-26	
FEDERALINS	16-Jun-26	
DHAKAINS	17-Jun-26	
MTB	18-Jun-26	

❖ News Flash Back

POWER GRID BANGLADESH TO GAIN TK700CR AS BERC RAISES WHEELING CHARGES BY 24%

Power Grid Bangladesh PLC is set to see a significant rise in revenue following a decision by the Bangladesh Energy Regulatory Commission (BERC) to increase electricity transmission tariffs, widely known as wheeling charges. In a price-sensitive disclosure filed with the Dhaka Stock Exchange (DSE) today (4 June), the state-run transmission company said the revised tariff will come into effect from the billing month of June 2026. The new rates reflect an increase of nearly 23–24% across all voltage levels, marking a substantial upward revision in transmission income. Following the disclosure, its share price rose 1.45% to close at Tk35.10.

Source: https://www.tbsnews.net/economy/stocks/power-grid-bangladesh-gain-tk700cr-berc-raises-wheeling-charges-24-1454286

BD THAI FOOD INKS DEAL WITH SAJEEB GROUP & EVERGREEN BEVERAGE TO PRODUCE SOFT DRINKS

BD Thai Food & Beverage Limited, a listed company on the stocks exchanges, has inked a manufacturing agreement with Sajeeb Group and Evergreen Beverage to produce carbonated soft drinks by ensuring full utilisation of its production capacity. According to a stock exchange disclosure issued yesterday, Sajeeb Group and Evergreen Beverage will jointly utilise 70% of BD Thai Food's carbonated soft drink production capacity, while BD Thai Food will use the remaining capacity to manufacture its own beverages. Under the agreement, Sajeeb Group will manufacture its "Wings" brand soft drinks and Evergreen Beverage will produce "Suncrest" brand beverages using BD Thai Food's carbonated soft drink production line.

Source:https://www.tbsnews.net/economy/stocks/bd-thai-food-inks-deal-sajeeb-group-evergreen-beverage-produce-soft-rinks1457586

ISLAMI BANK FACES WITHDRAWAL PRESSURE: TK3,500CR TAKEN OUT IN 5 DAYS

Customers have withdrawn more than Tk3,500 crore from Islami Bank within five working days following the appointment of former Bangladesh Bank deputy governor Md Khurshid Alam as chairman, amid growing uncertainty among depositors. According to one official, customers withdrew Tk2,570 crore during the first four working days (1-4June) after the appointment. Preliminary data from branches across the country suggest withdrawals yesterday alone could reach Tk1,000 crore, he said. Islami Bank Additional Managing Director and acting Managing Director Altaf Hossain acknowledged that some customers had been attempting to withdraw their deposits. "I urge customers not to panic. There is no reason to withdraw money out of fear at this moment."

Source: https://www.tbsnews.net/economy/banking/islami-bank-faces-withdrawal-pressure-tk3500cr-taken-out-5-days-1456801

BSEC OVERHAUL: NEW CHAIRMAN PRIORITISES REAL-TIME MARKET SURVEILLANCE, FOREIGN INVESTMENT

The newly appointed chairman of the Bangladesh Securities and Exchange Commission (BSEC), Masud Khan, has vowed to strengthen market surveillance and enforcement while placing a strong emphasis on attracting foreign investment, as the regulator undergoes a major leadership overhaul. Speaking at his first press conference after assuming office today (4 June), Masud outlined an ambitious roadmap aimed at restoring investor confidence, enhancing transparency, and building a more resilient capital market. At the press conference, Masud said the regulator would develop a modern, integrated surveillance system by coordinating with the Dhaka Stock Exchange (DSE), Chittagong Stock Exchange (CSE), and Central Depository Bangladesh Limited (CDBL). The system will enable real-time monitoring across the market, significantly enhancing oversight capabilities.

Source: https://www.tbsnews.net/economy/stocks/bsec-overhaul-new-chairman-prioritises-real-time-market-surveillance-foreign

Disclaimer

Data Source

Dhaka Stock Exchange PLC. (https://www.dsebd.org/index.php)
Bangladesh Securities and Exchange Commission. (https://sec.gov.bd/home)
Bangladesh Bank. (https://www.bb.org.bd/en)
Bangladesh Bureau of Statistics. (http://bbs.gov.bd)
Trading view (https://tradingview.com)