

Market Review

Peace Talks Propel Market Rally: Bulls Take Charge

The PSX witnessed a strong rally today following the announcement of a two-week ceasefire between the US and Iran, with the prospect of a long-term peace facilitated by Pakistan's mediation. The news sent investor sentiment soaring, propelling the market onto a bullish trajectory that triggered an immediate trading halt. Pakistan's elevated global recognition further reinforced confidence among market participants. The easing of geopolitical tensions also put relief on international crude oil prices, as the reopening of the Strait of Hormuz facilitated smoother trade flows—expected to benefit Pakistan's economy. The rally was led by the Fertilizer and Banking sectors, lifting the KSE-100 index to close at 165,811, marking a substantial gain of 14,138 points, or 9.32%, from the previous day's close. Trading volumes remained robust, with 487mn shares exchanged on the KSE-100 index and 1.24bn shares traded across the broader market. Top volume leaders for the day included FNEL (212mn), KEL (127mn), and WTL (97mn). Looking ahead, market momentum is expected to remain optimistic as Pakistan gains international visibility and macroeconomic conditions show signs of improvement. Investors are advised to exercise vigilance, focusing on fundamentally strong stocks with long-term growth potential while capitalizing on the current dip-buying opportunities.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	165,811.00	151,673.45	14,137.55	9.32%
High	165,924.13	152,013.05	-	-
Low	162,956.76	149,129.41	-	-
Change Point	14,137.55	465.64	-	-
Volume (mn)	486.66	205.23	281.42	137.13%
Value Trade (PKR bn)	44.93	17.50	27.43	156.74%
Market Cap (PKR bn)	15,709.73	14,410.21	1,299.51	9.02%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	98,689.99	90,786.85	7,903.14	8.71%
High	98,774.83	91,005.65	-	-
Low	96,813.01	89,590.24	-	-
Change Point	7,903.14	176.66	-	-
Volume (mn)	1,235.45	355.67	879.78	247.36%
Value Trade (PKR bn)	54.27	20.41	33.86	165.92%
Market Cap (PKR bn)	18,318.36	16,851.40	1,466.97	8.71%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	11.10%	11.10%	0.00
3 Month	11.68%	11.59%	9.00
6 Month	11.79%	11.70%	9.00
9 Month	12.13%	12.04%	9.00
1 Year	12.16%	12.08%	8.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
First National Equities Limited	FNEL	1.58	0.42	212.31
K-Electric Limited	KEL	7.96	0.97	127.32
Worldcall Telecom Limited	WTL	1.36	0.15	97.31
Cnergyco PK Limited	CNERGY	7.85	0.60	76.76
Trust Securities & Brokerage Limited	TSBL	1.82	0.37	67.03

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,572,753	9.04%	59,208,933
O. E. C	2,938,055	9.34%	28,448,950
FERTILIZER	1,417,712	9.99%	27,652,420
FOOD	1,019,730	3.80%	32,871,102
CEMENT	1,552,839	9.67%	25,091,168
CHEMICAL	627,448	6.86%	17,476,996
AUTOMOBILE	661,941	8.90%	2,715,570
POWER	618,818	10.97%	158,122,375
TECHNOLOGY	580,332	9.95%	173,757,612
TEXTILE CO.	415,210	8.24%	11,007,399
TOBACCO	332,351	10.00%	19,341
PHARMACEUTICALS	434,843	9.96%	13,495,029

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
K-Electric Limited	KEL	7.96	13.88%	0.97
Yousaf Weaving Mills Limited	YOUW	4.52	11.88%	0.48
Arif Habib Corporation Limited	AHCL	14.48	10.03%	1.32
Pakistan International Bulk Terminal	PIBTL	15.92	10.02%	1.45
Fauji Foods Limited	FFL	16.38	10.01%	1.49

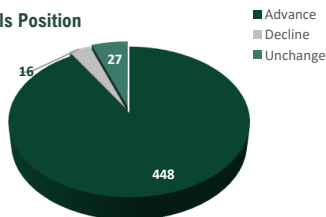
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Fauji Fertilizer Company Limited	FFC	541.49	1,444.63
United Bank Limited	UBL	346.65	949.14
Engro Holdings Limited	ENGROH	288.61	868.77
The Hub Power Company Limited	HUBC	218.57	664.34
Oil & Gas Development Company Limited	OGDC	302.87	610.38

Symbols Position



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