

Market Review

KSE-100 Closes Firm After Testing New Peak

The Pakistan Stock Exchange (PSX) extended its record-setting run as the benchmark KSE-100 Index posted another all-time high during today's session. The market opened on a strong footing, with early buying momentum lifting the index to an intraday peak of 174,805 (+909 points). However, as valuations stretched, profit-taking emerged mid-morning, pulling the index down to an intraday low of 174,121 (-225 points). Thereafter, sentiment stabilised, with selective buying enabling a gradual recovery through the afternoon session. At close, the KSE-100 Index settled at 174,473, marking a net gain of 576 points for the day. Trading activity remained robust, with volumes clocking in at 416mn shares on the KSE-100 and 843mn shares on the All-Share Index, reflecting sustained investor participation despite elevated index levels. TSBL (57mn), FFL (54mn), and UNITY (49mn) emerged as the most actively traded names during the session. Going forward, while near-term volatility driven by profit-taking cannot be ruled out at record highs, the market's ability to absorb selling pressure and close firmly underscores underlying strength in sentiment, supported by liquidity flows and selective sector rotation. Investors are advised to remain opportunistic, favouring fundamentally sound names amid any technical pullbacks.

HMFS Sales
sales@hmfs.com.pk

PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	174,472.79	173,896.34	576.45	0.33%
High	174,805.15	174,411.72	-	-
Low	174,121.41	173,200.41	-	-
Change Point	576.45	1,495.61	-	-
Volume (mn)	415.89	360.62	55.28	15.33%
Value Trade (PKR bn)	35.41	34.80	0.61	1.76%
Market Cap (PKR bn)	16,672.43	16,604.42	68.02	0.41%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	104,651.33	104,139.24	512.09	0.49%
High	104,784.05	104,393.33	-	-
Low	104,366.21	103,846.02	-	-
Change Point	512.09	655.29	-	-
Volume (mn)	842.56	855.26	-12.70	-1.48%
Value Trade (PKR bn)	44.77	42.81	1.96	4.58%
Market Cap (PKR bn)	19,681.85	19,585.54	96.31	0.49%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	10.82%	10.81%	1.00
3 Month	10.63%	10.63%	0.00
6 Month	10.65%	10.66%	-1.00
9 Month	10.91%	10.92%	-1.00
1 Year	10.91%	10.93%	-2.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
Trust Securities & Brokerage Limited	TSBL	3.99	0.63	57.46
Fauji Foods Limited	FFL	20.90	-0.07	54.43
Unity Foods Limited	UNITY	21.61	1.46	49.22
Pakistan Telecommunication Company Ltd	PTC	59.15	-0.47	45.11
The Bank of Punjab	BOP	38.71	-0.17	36.71

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,850,461	0.50%	60,600,758
O.E.C	2,880,347	1.69%	20,041,494
FERTILIZER	1,536,161	-0.77%	6,035,418
FOOD	1,082,070	-0.66%	79,833,990
CEMENT	1,889,865	-0.52%	32,355,742
CHEMICAL	725,981	0.18%	5,823,726
AUTOMOBILE	651,964	0.69%	1,439,701
POWER	579,667	0.80%	33,471,116
TECHNOLOGY	667,674	0.18%	121,383,955
TEXTILE CO.	458,655	-0.34%	9,168,177
TOBACCO	393,460	-0.49%	17,385
PHARMACEUTICALS	480,045	0.56%	20,566,286

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Sui Southern Gas Company Limited	SSGC	36.76	7.74%	2.64
Unity Foods Limited	UNITY	21.61	7.25%	1.46
Attock Refinery Limited	ATRL	692.56	4.52%	29.98
Adamjee Insurance Company Limited	AICL	81.05	3.31%	2.60
Yousaf Weaving Mills Limited	YOUW	5.40	3.25%	0.17

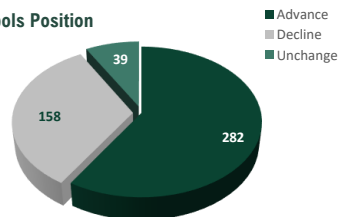
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Kohat Cement Company Limited	KOHC	116.60	-2.90%	-3.48
D.G. Khan Cement Company Limited	DGKC	238.64	-2.87%	-7.05
Thal Limited	THALL	520.75	-2.66%	-14.25
Rafhan Maize Products Company Limited	RMPL	9,938.61	-2.27%	-230.46
Ibrahim Fibres Limited	IBFL	284.60	-2.19%	-6.38

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Oil & Gas Development Company Limited	OGDC	280.71	156.90
United Bank Limited	UBL	422.98	141.81
Pakistan Petroleum Limited	PPL	234.76	114.67
Pakistan State Oil Company Limited	PSO	473.54	84.75
The Hub Power Company Limited	HUBC	222.87	66.50

Symbols Position



Equity Sales
Tel: 92 (21) 3582 2274
sales@hmfs.com.pk

Equity Research
Tel: 92 (21) 3264 8442
research@hmfs.com.pk

Disclaimer This report has been prepared and circulated by Habib Metropolitan Financial Services Limited ("HMFS") for information only, and is not intended to provide investment advice and does not take into account the specific investment objectives, financial situation and the particular needs of the recipients. It may be noted that information presented and opinions expressed in this report do not constitute a proposition for or solicitation of any offer to buy or sell any securities or futures. While information collected for the report has been through sources believed to be accurate and reliable at the time of publication, HMFSL nonetheless makes no representation or warranty as to its accurateness and/or completeness. Investors should always seek financial advice and make their own judgment regarding the appropriateness of investing in any securities or other investments and should understand that statements regarding future prospects of investments or investment strategies may not be realized. Investors should note that income from such securities or other investments, if any, may fluctuate and that price or value of such securities and investments may rise or fall. Accordingly, investors may receive back less than originally invested and HMFS accepts no responsibility or liability whatsoever for any type of subsequent and significant loss arising from any use of this report or its contents. To the extent permissible by law HMFS and any of its officers, employees or directors may take or have a position, or otherwise be interested in any transaction in any securities or futures directly or indirectly forming the subject of this report. HMFSL may be also interested or may have business relationships with the companies profiled in this report. This report may not be distributed and published without HMFSL's consent.