

Market Review

Investor Caution Pulls KSE-100 Lower Amid E&P and Banking Pressure

The equity market traded in negative territory for the majority of today's session after a brief green start. The KSE-100 index experienced a sharp intra-day decline of 3,137 points before gradually recovering to close at 182,340, down by 1,789 points from the previous session. The primary driver of today's sell-off was Moody's revision of the banking sector outlook from positive to stable, which weighed heavily on investor sentiment. Profit-taking was also observed in the E&P sector, contributing to the downward pressure. Trading activity remained robust, with 598mn shares exchanged on the KSE-100 index and 928mn shares traded across the broader market. Top volume contributors included KEL (302mn), BOP (53mn), and AGHA (47mn). Looking ahead, the market is expected to remain sensitive to international developments and geopolitical tensions. However, supportive macroeconomic indicators could help restore bullish momentum in the near term. Investors are advised to maintain vigilance, monitor evolving market conditions, and focus on fundamentally strong stocks with long-term growth potential.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	182,340.38	184,129.58	-1,789.20	-0.97%
High	185,650.59	188,036.30	-	-
Low	180,992.79	183,547.29	-	-
Change Point	-1,789.20	-3,702.50	-	-
Volume (mn)	597.72	798.69	-200.97	-25.16%
Value Trade (PKR bn)	50.62	48.37	2.26	4.66%
Market Cap (PKR bn)	17,558.98	17,719.45	-160.46	-0.91%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	109,847.66	110,763.73	-916.07	-0.83%
High	111,697.72	112,988.74	-	-
Low	109,100.21	110,390.49	-	-
Change Point	-916.07	-2,087.96	-	-
Volume (mn)	927.99	1,266.28	-338.29	-26.72%
Value Trade (PKR bn)	58.80	60.23	-1.43	-2.38%
Market Cap (PKR bn)	20,707.34	20,879.74	-172.40	-0.83%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	10.74%	10.74%	0.00
3 Month	10.51%	10.50%	1.00
6 Month	10.51%	10.50%	1.00
9 Month	10.76%	10.74%	2.00
1 Year	10.76%	10.74%	2.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
K-Electric Limited	KEL	9.42	0.48	302.44
The Bank of Punjab	BOP	39.70	-0.39	52.95
Agha Steel Ind.Ltd	AGHA	8.98	0.34	46.98
National Bank of Pakistan	NBP	266.11	2.63	40.71
Pakistan International Bulk Terminal	PIBTL	19.48	0.12	26.26

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	5,284,182	-1.34%	119,164,514
O.E.C	3,038,690	-2.54%	31,368,206
FERTILIZER	1,584,809	-0.67%	7,536,516
FOOD	1,093,794	1.96%	20,957,523
CEMENT	1,801,411	-1.24%	21,539,908
CHEMICAL	700,206	-0.72%	20,824,504
AUTOMOBILE	773,259	1.28%	3,520,262
POWER	696,783	1.14%	327,338,942
TECHNOLOGY	661,587	-1.12%	62,626,820
TEXTILE CO.	479,121	-0.26%	15,251,024
TOBACCO	408,846	-0.71%	8,205
PHARMACEUTICALS	523,377	2.44%	21,515,323

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
AGP Limited	AGP	235.15	10.00%	21.38
K-Electric Limited	KEL	9.42	5.37%	0.48
Sazgar Engineering Works Limited	SAZEW	2,455.81	5.30%	123.56
Nestle Pakistan Limited	NESTLE	8,265.26	5.25%	412.53
Abbott Laboratories (Pakistan) Limited	ABOT	1,185.83	3.33%	38.24

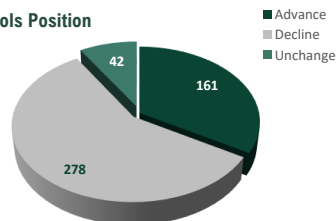
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Askari Bank Limited	AKBL	107.58	-9.23%	-10.94
Lotte Chemical Pakistan Limited	LOTCEM	22.90	-5.18%	-1.25
Faysal Bank Limited	FABL	91.87	-5.07%	-4.91
Nishat Mills Limited	NML	186.30	-3.87%	-7.51
Oil & Gas Development Company Limited	OGDC	310.07	-3.46%	-11.11

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Oil & Gas Development Company Limited	OGDC	310.07	-242.89
Meezan Bank Limited	MEBL	489.15	-178.32
Pakistan Petroleum Limited	PPL	253.84	-173.08
United Bank Limited	UBL	487.99	-171.67
Lucky Cement Limited	LUCK	457.49	-166.21

Symbols Position



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