

Market Review

KSE-100 surrenders intraday gains to close in the red amid Iran-US geopolitical uncertainty

Equities at the Pakistan Stock Exchange opened the week on a positive note as Iranian negotiators signalled progress in peace talks with the United States following the first round of high-level discussions held in Switzerland, lifting the KSE-100 as much as 1,585 points intraday to 180,508. Broad-based buying was observed across index-heavy sectors, which were trading firmly in the green. However, sentiment soured through the session as markets digested the backdrop of continued Strait of Hormuz disruptions and the absence of a concrete ceasefire agreement, with the benchmark ultimately surrendering all gains to close at 178,472, down 451 points. Total traded volume on the KSE stood at 230mn shares, while market-wide volumes across the All-share index reached 801mn shares. WTL (60mn), TPL (59mn), and TPLP (56mn), were the most traded scrips during today's session. Going forward, near-term market direction will remain hostage to developments in the Iran-US negotiations, with the agreed 60-day roadmap toward a final deal providing a tentative floor to sentiment without resolving underlying uncertainty. Investors are advised to remain cautious on position-building and favour fundamentally sound scrips with strong dividend visibility on dips, until clearer signals emerge from the ongoing technical talks in Buergenstock this week.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	178,471.86	178,922.75	-450.89	-0.25%
High	180,507.82	182,185.87	-	-
Low	178,337.14	177,836.16	-	-
Change Point	-450.89	-2,475.46	-	-
Volume (mn)	230.11	458.03	-227.92	-49.76%
Value Trade (PKR bn)	24.06	41.69	-17.64	-42.30%
Market Cap (PKR bn)	16,789.59	16,807.27	-17.68	-0.11%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	107,750.15	107,850.26	-100.11	-0.09%
High	108,719.92	109,621.39	-	-
Low	107,713.91	107,204.79	-	-
Change Point	-100.11	-1,356.82	-	-
Volume (mn)	800.56	1,038.22	-237.67	-22.89%
Value Trade (PKR bn)	36.01	53.89	-17.88	-33.18%
Market Cap (PKR bn)	19,972.25	19,990.37	-18.12	-0.09%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	11.94%	11.95%	-1.00
3 Month	11.91%	11.92%	-1.00
6 Month	12.04%	12.07%	-3.00
9 Month	12.34%	12.35%	-1.00
1 Year	12.37%	12.39%	-2.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
Worldcall Telecom Limited	WTL	1.26	-0.03	59.56
TPL Corp Limited	TPL	16.52	0.80	59.27
TPL Properties Limited	TPLP	10.95	0.71	56.04
Sui Southern Gas Company Limited	SSGC	32.23	0.91	33.02
Ghani Chemical Industries Limited	GCIL	34.38	3.13	30.19

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,871,559	-0.44%	34,893,524
O.E.C	3,083,618	0.42%	18,770,560
FERTILIZER	1,478,019	-0.26%	6,151,444
FOOD	1,032,173	-0.80%	21,951,813
CEMENT	1,734,797	-0.57%	25,057,591
CHEMICAL	682,649	1.21%	58,466,749
AUTOMOBILE	743,188	0.30%	2,946,695
POWER	644,241	0.40%	37,105,594
TECHNOLOGY	647,115	-0.37%	95,125,660
TEXTILE CO.	474,571	-0.05%	25,957,950
TOBACCO	362,827	1.27%	31,126
PHARMACEUTICALS	443,926	-0.24%	6,128,269

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Sui Northern Gas Pipelines Limited	SNGP	122.86	5.15%	6.02
Colgate-Palmolive (Pakistan) Limited	COLG	1,254.11	3.72%	45.03
Sui Southern Gas Company Limited	SSGC	32.23	2.91%	0.91
Millat Tractors Limited	MTL	312.38	2.88%	8.75
Pak-Gulf Leasing Company Limited	PGLC	14.99	2.88%	0.42

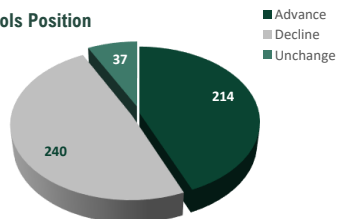
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Pakistan Stock Exchange Limited	PSX	49.62	-3.76%	-1.94
International Steels Limited	ISL	86.39	-2.88%	-2.56
S.S.Oil Mills Limited	SSOM	509.44	-2.82%	-14.77
Gadoon Textile Mills Limited	GADT	311.91	-2.73%	-8.76
Nishat Power Limited	NPL	74.20	-2.42%	-1.84

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Fauji Fertilizer Company Limited	FFC	557.94	-77.48
Bank AL Habib Limited	BAHL	170.71	-77.23
Habib Bank Limited	HBL	294.98	-70.16
Lucky Cement Limited	LUCK	459.06	-60.24
MCB Bank Limited	MCB	400.10	-41.04

Symbols Position



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