Market Review

Markets Rebound Sharply on Oil Relief and Diplomatic Hopes

Following the sharp decline witnessed in the previous session, the equity market staged a notable rebound as global sentiment improved. Easing crude oil prices and emerging diplomatic efforts aimed at de-escalating tensions between the United States and the Middle East provided relief to international markets, which in turn supported investor sentiment locally. The trading session opened on an exceptionally strong note, with the benchmark KSE-100 Index surging sharply and triggering a temporary market halt and later touching an intraday high of 11,874 points. The rally was primarily driven by heavyweight participation from the fertilizer and banking sectors, which spearheaded the recovery. Despite the strong rebound during the session, the benchmark ultimately settled at 156,177, reflecting a decline of 9,697 points. Trading activity remained healthy, with 290mn shares traded on the KSE-100 Index and 484mn shares exchanged in the broader market. Volume leaders for the day included KEL (53mn), BOP (39mn), and CNERGY (27mn). Going forward, market direction will remain closely tied to geopolitical developments, particularly the evolving situation surrounding tensions involving the US and Iran, as well as broader movements in global markets. Any escalation could trigger renewed bouts of profit-taking, while progress toward diplomatic resolution may help restore bullish momentum. In this environment, investors are advised to remain prudent and focus on fundamentally strong companies offering sustainable long-term growth potential.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	156,177.12	146,480.14	9,696.98	6.62%
High	158,354.12	150,174.09	-	-
Low	155,294.65	144,119.43	-	-
Change Point	9,696.98	-11,015.96	-	-
Volume (mn)	289.65	378.01	-88.36	-23.37%
Value Trade (PKR bn)	27.41	33.00	-5.59	-16.94%
Market Cap (PKR bn)	15,051.60	14,187.30	864.31	6.09%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	93,623.08	88,401.14	5,221.94	5.91%
High	94,926.71	90,673.17	-	-
Low	92,870.12	86,998.40	-	-
Change Point	5,221.94	-5,825.86	-	-
Volume (mn)	484.05	613.63	-129.58	-21.12%
Value Trade (PKR bn)	31.17	37.00	-5.83	-15.75%
Market Cap (PKR bn)	17,577.39	16,598.67	978.73	5.90%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	10.92%	10.98%	-6.00
3 Month	10.78%	10.81%	-3.00
6 Month	10.89%	10.89%	0.00
9 Month	11.35%	11.34%	1.00
1 Year	11.39%	11.40%	-1.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
K-Electric Limited	KEL	7.73	0.53	53.27
The Bank of Punjab	BOP	27.28	1.83	38.63
Cnergyico PK Limited	CNERGY	6.92	0.37	27.36
First National Equities Limited	FNEL	1.27	0.12	15.50
Unity Foods Limited	UNITY	9.09	0.59	14.73

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,543,387	6.33%	73,824,373
O.E.C	2,776,243	4.82%	17,797,871
FERTILIZER	1,349,702	6.85%	8,525,841
FOOD	997,242	3.56%	14,829,422
CEMENT	1,444,601	7.30%	36,129,095
CHEMICAL	599,564	4.17%	6,572,639
AUTOMOBILE	640,375	4.17%	1,791,156
POWER	595,004	8.32%	71,567,406
TECHNOLOGY	525,642	9.04%	44,311,219
TEXTILE CO.	389,840	6.40%	11,298,498
TOBACCO	317,538	5.06%	10,351
PHARMACEUTICALS	395,046	7.20%	6,509,967

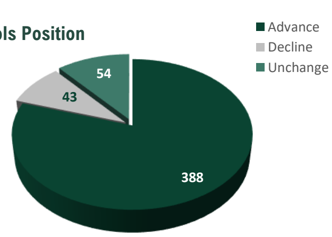
Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Yousaf Weaving Mills Limited	YOUW	3.87	11.53%	0.40
Lotte Chemical Pakistan Limited	LOTCHEM	20.54	10.02%	1.87
Adamjee Insurance Company Limited	AICL	68.06	10.01%	6.19
Habib Bank Limited	HBL	287.06	10.00%	26.10
Engro Holdings Limited	ENGROH	259.86	10.00%	23.62

Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Murree Brewery Company Limited	MUREB	845.09	-0.44%	-3.78
Pakistan Oilfields Limited	POL	629.12	-0.09%	-0.60

Symbols Position



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Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Fauji Fertilizer Company Limited	FFC	509.94	1,121.54
Engro Holdings Limited	ENGROH	259.86	775.52
United Bank Limited	UBL	381.49	601.91
The Hub Power Company Limited	HUBC	207.13	596.81
Meezan Bank Limited	MEBL	462.74	525.59