

Market Review

KSE-100 Remains Rangebound Amid Persistent Geopolitical Concerns

The market traded within a narrow band during the session as cautious investor sentiment prevailed amid ongoing geopolitical tensions. The benchmark KSE-100 Index came under pressure early in the day, declining by as much as 1,641 points intraday on the back of subdued risk appetite and mild profit-taking. However, partial recovery in the latter half of the session helped trim losses, with the index ultimately settling at 153,866, down 555 points. Trading activity remained subdued, reflecting investor caution, with 113mn shares exchanged within the KSE-100 Index, while broader market volumes stood at 290mn shares. Among individual stocks, DSL led the volume chart with 28mn shares, followed by HASCOL (25mn shares) and BOP (16mn shares). Looking ahead, market direction is likely to remain sensitive to developments on the geopolitical front, particularly evolving dynamics surrounding US-Iran tensions and their potential implications for global oil markets. Persistently elevated crude prices could sustain volatility and limit near-term upside. Meanwhile, progress in Pakistan-IMF negotiations regarding the EFF third review and RSF second review could provide a supportive catalyst for market sentiment. Until greater clarity emerges on these fronts, investors may continue to adopt a cautious stance while selectively accumulating fundamentally strong stocks on dips.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	153,866.16	154,421.43	-555.27	-0.36%
High	155,002.10	157,080.28	-	-
Low	152,780.79	153,503.70	-	-
Change Point	-555.27	-1,437.04	-	-
Volume (mn)	113.04	202.93	-89.89	-44.29%
Value Trade (PKR bn)	11.73	20.37	-8.64	-42.40%
Market Cap (PKR bn)	14,782.24	14,816.43	-34.19	-0.23%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	92,322.40	92,487.77	-165.37	-0.18%
High	92,894.46	93,971.32	-	-
Low	91,834.82	92,207.01	-	-
Change Point	-165.37	-898.05	-	-
Volume (mn)	289.91	401.80	-111.89	-27.85%
Value Trade (PKR bn)	14.54	24.64	-10.09	-40.97%
Market Cap (PKR bn)	17,326.54	17,363.89	-37.35	-0.22%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	10.96%	10.94%	2.00
3 Month	10.82%	10.80%	2.00
6 Month	10.96%	10.91%	5.00
9 Month	11.41%	11.38%	3.00
1 Year	11.43%	11.39%	4.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
Dost Steels Limited	DSL	5.70	0.20	27.79
Hascol Petroleum Limited	HASCOL	17.99	0.53	25.43
The Bank of Punjab	BOP	27.26	-0.46	16.33
First National Equities Limited	FNEL	1.19	0.00	15.93
K-Electric Limited	KEL	7.59	0.00	15.07

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,483,017	0.28%	29,847,992
O.E.C	2,657,743	-0.19%	6,475,848
FERTILIZER	1,328,843	-0.78%	3,114,077
FOOD	998,489	-0.44%	9,351,273
CEMENT	1,398,322	-0.80%	17,390,174
CHEMICAL	603,077	0.38%	6,619,537
AUTOMOBILE	621,614	-0.73%	1,180,005
POWER	576,509	-0.85%	31,284,926
TECHNOLOGY	527,522	0.22%	22,876,921
TEXTILE CO.	392,864	0.36%	5,401,853
TOBACCO	331,059	1.54%	14,322
PHARMACEUTICALS	402,274	-1.07%	1,542,067

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Yousaf Weaving Mills Limited	YOUW	4.27	10.62%	0.41
Mehmood Textile Mills Limited	MEHT	248.72	6.75%	15.73
Gadoon Textile Mills Limited	GADT	258.82	5.64%	13.82
Faysal Bank Limited	FABL	85.68	5.28%	4.30
Pakistan Services Limited	PSEL	891.83	5.27%	44.61

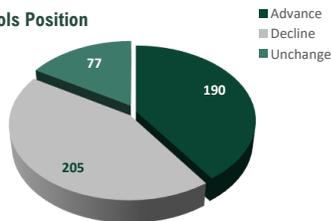
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
HLB Growth Fund	HGFA	13.99	-4.37%	-0.64
TPL REIT Fund I	TPLRF1	8.51	-4.17%	-0.37
AGP Limited	AGP	195.98	-3.88%	-7.91
Engro Holdings Limited	ENGROH	271.00	-3.55%	-9.99
Shifa International Hospitals Limited	SHFA	470.90	-3.29%	-16.02

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Engro Holdings Limited	ENGROH	271.00	-328.31
Lucky Cement Limited	LUCK	358.85	-114.69
Fauji Fertilizer Company Limited	FFC	501.02	-109.81
The Hub Power Company Limited	HUBC	197.98	-53.43
Meezan Bank Limited	MEBL	444.72	-42.38

Symbols Position



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