

Market Review

Oil Shock Deepens as Gulf Strikes Send PSX Into Retreat

Pakistan's main equities bourse retreated sharply today as a fresh surge in global oil prices — triggered by escalating attacks on Gulf energy infrastructure — reignited inflation and fuel-cost concerns, driving broad-based profit-taking across the benchmark. The KSE-100 Index settled at 152,740, shedding 1,552 points from the previous close, after trading between an intraday high of 153,323 and a session low of 150,728 — a swing of approximately 2,595 points. The primary catalyst for the selloff was the deteriorating situation in the Middle East, where Qatar's main gas hub suffered damage following two waves of Iranian missile strikes, and pushing Brent crude above USD 112 per barrel. For Pakistan, the implications are direct — higher crude prices translate into an elevated import bill, upward pressure on domestic fuel costs, and a more complex inflation outlook, all of which weighed on investor confidence. Volumes recorded at the KSE-100 and All-Share indices were 147mn and 324mn, respectively. Whereas, the most traded scrips were WASLR (40mn), BOP (23mn), and FNEL (22mn), during the session. Going forward, market direction will remain hostage to geopolitical developments, with any credible move toward de-escalation in the Middle East serving as the primary catalyst for a recovery. Investors are advised to remain selective and focused on fundamentally resilient scrips as volatility persists.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	152,740.37	154,292.25	-1,551.88	-1.01%
High	153,322.96	154,684.45	-	-
Low	150,728.17	150,284.25	-	-
Change Point	-1,551.88	4,276.09	-	-
Volume (mn)	147.44	213.82	-66.37	-31.04%
Value Trade (PKR bn)	16.41	18.92	-2.51	-13.24%
Market Cap (PKR bn)	14,548.35	14,717.22	-168.87	-1.15%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	91,858.47	92,658.57	-800.10	-0.86%
High	92,150.93	92,881.96	-	-
Low	90,699.03	90,414.35	-	-
Change Point	-800.10	2,494.23	-	-
Volume (mn)	324.25	393.53	-69.28	-17.60%
Value Trade (PKR bn)	19.37	22.30	-2.94	-13.17%
Market Cap (PKR bn)	17,065.04	17,252.43	-187.38	-1.09%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	11.13%	11.16%	-3.00
3 Month	11.32%	11.24%	8.00
6 Month	11.41%	11.35%	6.00
9 Month	11.76%	11.69%	7.00
1 Year	11.81%	11.76%	5.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
Wasi Mobility Modaraba(Right)	WASLR	0.79	0.15	40.36
The Bank of Punjab	BOP	25.88	-0.17	22.78
First National Equities Limited	FNEL	1.25	0.05	22.03
K-Electric Limited	KEL	7.62	-0.11	16.58
National Bank of Pakistan	NBP	181.32	-3.25	10.06

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,258,338	-1.94%	45,029,557
O.E.C	2,693,296	-1.15%	10,341,964
FERTILIZER	1,310,940	-0.17%	5,472,290
FOOD	999,313	-0.35%	7,559,685
CEMENT	1,391,159	-0.94%	20,992,514
CHEMICAL	596,178	-1.15%	8,066,762
AUTOMOBILE	614,598	-0.64%	2,491,492
POWER	573,781	-0.86%	30,875,030
TECHNOLOGY	526,613	-1.07%	25,362,342
TEXTILE CO.	395,699	-0.15%	6,589,571
TOBACCO	328,279	0.82%	39,374
PHARMACEUTICALS	404,489	-0.76%	3,241,014

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Pakgen Power Limited	PKGP	49.15	9.86%	4.41
Bannu Woollen Mills Limited	BNWM	57.07	9.00%	4.71
First Habib Modaraba	FHAM	29.88	2.57%	0.75
Kohinoor Textile Mills Limited	KTML	48.85	2.43%	1.16
Yousaf Weaving Mills Limited	YOUW	4.20	1.21%	0.05

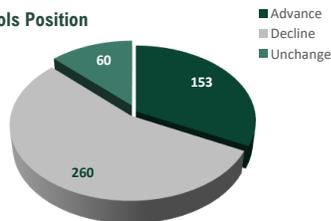
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Adamjee Insurance Company Limited	AICL	67.64	-7.91%	-5.81
Pakistan Stock Exchange Limited	PSX	33.69	-5.31%	-1.89
Unity Foods Limited	UNITY	8.19	-4.43%	-0.38
JDW Sugar Mills Limited	JDWS	845.38	-3.91%	-34.39
TPL REIT Fund I	TPLRF1	8.52	-3.73%	-0.33

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Engro Holdings Limited	ENGROH	261.84	-176.99
United Bank Limited	UBL	368.72	-161.63
Pakistan Petroleum Limited	PPL	213.83	-127.83
Meezan Bank Limited	MEBL	437.32	-92.47
Engro Fertilizers Limited	EFERT	200.98	-81.40

Symbols Position



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