

Market Review

KSE-100 Drops as Market Volatility Intensifies on US-Iran Tensions

The market witnessed significant selling pressure at the PSX amid heightened regional geopolitical tensions, with the benchmark KSE-100 Index plunging over 2,300 points during intraday trading. Although the index briefly turned positive by midday on limited recovery, persistent investor caution led the market to ultimately close in the red at 154,421, registering a loss of 1,437 points. Brent crude surged back to ~USD 100/bbl as Iran intensified attacks on oil and transport infrastructure across the Middle East, heightening concerns over a prolonged regional conflict and potential disruptions to oil flows through the Strait of Hormuz. The sharp rise in crude prices amplified market uncertainty, prompting cautious investor sentiment and intraday volatility amid fears of supply-side shocks. Around 203mn shares were traded within the KSE-100 Index, while overall market volumes reached 402mn shares. Among individual stocks, HASCOL led the volume chart, followed by KEL and DSL. Going forward, market direction will remain closely tied to geopolitical developments, particularly US-Iran tensions, and broader global market trends. Any escalation may trigger selling pressure, while diplomatic progress could restore bullish momentum. Ongoing Pakistan-IMF talks have yet to reach an SLA on the EFF third review and RSF second review, with negotiations expected to continue in the coming days. Any positive outcome could boost investor confidence and return bulls to the bourse. Investors are therefore advised to remain cautious and focus on fundamentally strong companies with sustainable long-term growth prospects.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	154,421.43	155,858.47	-1,437.04	-0.92%
High	157,080.28	158,624.51	-	-
Low	153,503.70	155,652.35	-	-
Change Point	-1,437.04	-318.65	-	-
Volume (mn)	202.93	232.66	-29.73	-12.78%
Value Trade (PKR bn)	20.37	19.66	0.71	3.63%
Market Cap (PKR bn)	14,816.43	14,992.99	-176.56	-1.18%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	92,487.77	93,385.82	-898.05	-0.96%
High	93,971.32	94,888.35	-	-
Low	92,207.01	93,342.38	-	-
Change Point	-898.05	-237.26	-	-
Volume (mn)	401.80	437.37	-35.57	-8.13%
Value Trade (PKR bn)	24.64	24.92	-0.28	-1.11%
Market Cap (PKR bn)	17,363.89	17,532.50	-168.61	-0.96%

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
Hascol Petroleum Limited	HASCOL	17.46	1.25	38.34
K-Electric Limited	KEL	7.59	0.10	38.05
Dost Steels Limited	DSL	5.50	-0.14	25.15
Worldcall Telecom Limited	WTL	1.24	-0.04	25.04
The Bank of Punjab	BOP	27.72	-0.25	20.60

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,470,656	-1.59%	37,156,371
O.E.C	2,662,913	-2.23%	8,917,358
FERTILIZER	1,339,252	-0.46%	17,252,516
FOOD	1,002,932	0.34%	8,682,209
CEMENT	1,409,626	-2.37%	30,450,677
CHEMICAL	600,800	-0.98%	10,530,765
AUTOMOBILE	626,160	-1.89%	753,209
POWER	581,452	-0.89%	61,678,984
TECHNOLOGY	526,367	1.43%	52,652,424
TEXTILE CO.	391,455	-0.93%	5,038,369
TOBACCO	326,038	2.74%	30,312
PHARMACEUTICALS	406,623	1.67%	5,793,926

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Highnoon Laboratories Limited	HINOON	898.08	8.48%	70.18
AGP Limited	AGP	203.89	8.11%	15.29
Service Industries Limited	SRVI	1,574.99	5.73%	85.28
Systems Limited	SYS	122.14	5.41%	6.27
HBL Growth Fund	HGFA	14.63	4.72%	0.66

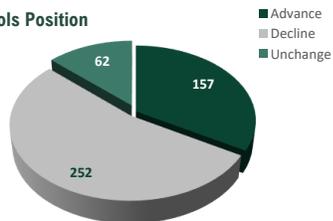
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Pak-Gulf Leasing Company Limited	PGLC	13.13	-6.21%	-0.87
Ibrahim Fibres Limited	IBFL	199.60	-5.40%	-11.39
Fauji Cement Company Limited	FCCL	39.41	-4.51%	-1.86
Packages Limited	PKGS	670.47	-3.95%	-27.55
Nishat Mills Limited	NML	141.18	-3.71%	-5.44

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
United Bank Limited	UBL	365.22	-273.32
Lucky Cement Limited	LUCK	366.50	-187.53
Oil & Gas Development Company Limited	OGDC	274.81	-186.01
The Hub Power Company Limited	HUBC	199.59	-169.43
MCB Bank Limited	MCB	361.33	-155.92

Symbols Position



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