

Market Review

Gulf Escalation Sparks Market Rout

The KSE-100 Index came under intense pressure today as renewed geopolitical escalation between the US and Iran triggered a sharp risk-off sentiment across the market. Escalating military activity in the Gulf and fresh attacks on the UAE severely dented investor confidence, overshadowing recent gains and prompting aggressive selling across key sectors. The benchmark index lost nearly 2,500 points at the intraday low before closing at 171,116 points, down 1,778 points (-1.0%). Rising uncertainty surrounding the fragile ceasefire and volatility in international oil prices further intensified concerns over regional stability and macroeconomic risks, keeping investors on the defensive throughout the session. Market activity remained relatively subdued, with 432mn shares traded on the KSE-100 Index and 1.02bn shares exchanged in the broader market. Major volume leaders included KEL (144mn shares), HASCOL (101mn shares), and CNERGY (84mn shares). Going forward, market direction is expected to remain heavily influenced by geopolitical developments and movements in global energy markets. Until clarity emerges on the evolving Middle East situation, sentiment is likely to remain cautious, with investors favoring fundamentally strong stocks capable of withstanding heightened external volatility.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	171,115.82	172,894.27	-1,778.45	-1.03%
High	172,287.45	173,274.54	-	-
Low	170,393.12	171,541.04	-	-
Change Point	-1,778.45	1,189.52	-	-
Volume (mn)	431.76	429.22	2.54	0.59%
Value Trade (PKR bn)	24.16	41.11	-16.94	-41.22%
Market Cap (PKR bn)	16,119.21	16,286.12	-166.91	-1.02%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	102,630.81	103,374.79	-743.98	-0.72%
High	103,268.10	103,505.69	-	-
Low	102,203.61	102,458.65	-	-
Change Point	-743.98	892.69	-	-
Volume (mn)	1,022.40	980.79	41.62	4.24%
Value Trade (PKR bn)	36.62	52.61	-15.99	-30.40%
Market Cap (PKR bn)	18,899.76	19,043.06	-143.31	-0.75%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	11.88%	11.89%	-1.00
3 Month	11.78%	11.77%	1.00
6 Month	11.98%	11.98%	0.00
9 Month	12.29%	12.31%	-2.00
1 Year	12.33%	12.32%	1.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
K-Electric Limited	KEL	8.12	0.20	144.42
Hascol Petroleum Limited	HASCOL	24.56	1.31	100.75
Cnergyico PK Limited	CNERGY	8.53	0.21	84.11
Telecard Limited	TELE	8.69	0.15	36.42
Pakistan International Bulk Terminal	PIBTL	17.13	0.09	32.34

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,684,746	-1.32%	46,652,328
O.E.C	3,011,596	-1.53%	10,903,354
FERTILIZER	1,382,323	-1.10%	4,494,912
FOOD	1,046,219	-0.03%	53,380,762
CEMENT	1,640,590	-0.80%	67,072,529
CHEMICAL	627,924	-0.08%	9,908,127
AUTOMOBILE	727,670	0.03%	13,522,562
POWER	623,127	0.47%	160,120,402
TECHNOLOGY	594,954	-0.83%	101,963,000
TEXTILE CO.	436,136	-0.53%	10,180,146
TOBACCO	359,485	-3.17%	15,995
PHARMACEUTICALS	431,930	-0.96%	8,925,928

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Gadon Textile Mills Limited	GADT	287.49	8.50%	22.51
Pioneer Cement Limited	PIOC	278.38	5.77%	15.19
Honda Atlas Cars (Pakistan) Limited	HCAR	234.02	3.71%	8.38
Hum Network Limited	HUMNL	11.70	2.99%	0.34
K-Electric Limited	KEL	8.12	2.53%	0.20

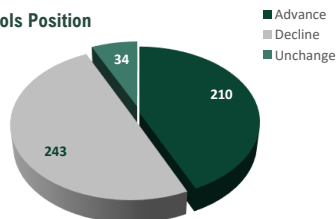
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Fauji Cement Company Limited	FCCL	51.85	-2.99%	-1.60
International Industries Limited	INIL	159.20	-2.93%	-4.81
Abbott Laboratories (Pakistan) Limited	ABOT	891.67	-2.87%	-26.35
Sui Southern Gas Company Limited	SSGC	27.91	-2.85%	-0.82
Fatima Fertilizer Company Limited	FATIMA	137.43	-2.40%	-3.38

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
United Bank Limited	UBL	415.22	-198.42
Engro Holdings Limited	ENGROH	279.50	-188.52
Meezan Bank Limited	MEBL	485.95	-141.31
Pakistan Petroleum Limited	PPL	229.93	-115.59
Mari Energies Limited	MARI	650.81	-99.00

Symbols Position



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