

Market Review

Post-Eid Optimism Extends Rally Amid Easing Geopolitical Concerns

The Pakistan Stock Exchange (PSX) resumed trading after the extended Eid holidays on a strong footing, with the benchmark KSE-100 Index maintaining its bullish momentum amid weakness in international oil prices and improving sentiment surrounding a potential US-Iran ceasefire arrangement. Positive momentum persisted throughout the session, with broad-based buying observed across index-heavy sectors including fertilizer, cement, and E&Ps, allowing the market to steadily build gains during the day. The benchmark KSE-100 Index ultimately settled at 173,963 level, up 2,238 points from the previous close. Trading activity, however, remained relatively subdued owing to the post-Eid session, with volumes on the KSE-100 Index recorded at 314mn shares, while broader market participation stood at 550mn shares. Among the volume leaders, TRG (34mn shares), BOP (24mn shares), and WTL (23mn shares) dominated trading activity. Going forward, market sentiment is expected to remain sensitive to further developments on the geopolitical front and the direction of international oil prices. Meanwhile, investors are also likely to keep a close watch on upcoming budgetary measures and broader macroeconomic indicators, while selective accumulation in fundamentally strong sectors may continue to support market performance in the near term.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	173,962.81	171,725.29	2,237.52	1.30%
High	174,106.34	171,920.80	-	-
Low	171,545.46	170,161.66	-	-
Change Point	2,237.52	3,881.05	-	-
Volume (mn)	313.69	261.56	52.13	19.93%
Value Trade (PKR bn)	35.36	26.21	9.15	34.90%
Market Cap (PKR bn)	16,354.60	16,201.54	153.07	0.94%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	104,178.61	103,214.48	964.13	0.93%
High	104,373.04	103,303.39	-	-
Low	103,047.49	102,570.03	-	-
Change Point	964.13	2,024.02	-	-
Volume (mn)	550.40	498.64	51.76	10.38%
Value Trade (PKR bn)	40.81	31.04	9.76	31.46%
Market Cap (PKR bn)	19,162.56	18,985.33	177.23	0.93%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	12.03%	12.09%	-6.00
3 Month	12.24%	12.34%	-10.00
6 Month	12.50%	12.56%	-6.00
9 Month	12.88%	12.91%	-3.00
1 Year	12.94%	12.98%	-4.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
TRG Pakistan Limited	TRG	69.17	5.97	34.19
The Bank of Punjab	BOP	34.59	0.06	23.89
Worldcall Telecom Limited	WTL	1.29	-0.01	22.88
Maple Leaf Cement Factory Limited	MLCF	91.56	2.18	19.02
Sui Southern Gas Company Limited	SSGC	27.73	0.90	17.91

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,728,517	0.21%	57,369,312
O.E.C	3,059,349	0.23%	9,154,579
FERTILIZER	1,445,522	2.97%	12,375,958
FOOD	1,039,239	0.41%	17,418,730
CEMENT	1,662,233	2.47%	70,447,455
CHEMICAL	634,884	1.21%	22,966,040
AUTOMOBILE	739,736	1.84%	3,957,747
POWER	631,585	0.19%	27,591,055
TECHNOLOGY	635,901	0.98%	91,990,614
TEXTILE CO.	434,295	0.43%	5,115,434
TOBACCO	344,234	0.00%	19,855
PHARMACEUTICALS	424,940	0.99%	5,520,585

Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Tariq Glass Industries Limited	TGL	182.61	9.92%	16.48
TRG Pakistan Limited	TRG	69.17	9.45%	5.97
Honda Atlas Cars (Pakistan) Limited	HCAR	241.10	6.76%	15.27
Thal Limited	THALL	640.41	5.91%	35.76
Power Cement Limited	POWER	21.63	5.26%	1.08

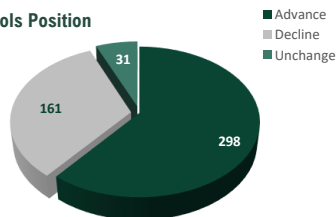
Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Cnergyco PK Limited	CNERGY	8.36	-1.88%	-0.16
Attock Petroleum Limited	APL	555.20	-1.36%	-7.66
Pakistan Petroleum Limited	PPL	237.53	-1.33%	-3.20
Systems Limited	SYS	149.88	-1.25%	-1.90
Attock Refinery Limited	ATRL	888.18	-1.16%	-10.45

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Fauji Fertilizer Company Limited	FFC	563.48	601.77
Engro Holdings Limited	ENGROH	276.44	295.35
Lucky Cement Limited	LUCK	453.43	255.96
Engro Fertilizers Limited	EFERT	208.15	119.52
Bank AL Habib Limited	BAHL	176.41	111.02

Symbols Position



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