HABIBMETRO Financial Services

PSX ROUND - UP

REP - 110

Tuesday, 4 November 2025

Market Review

Profit-Taking Pulls Back the Bulls as Geopolitical Pressures Weigh on Sentiment

After a strong rally in the previous session, the KSE-100 Index witnessed a wave of profit-taking as investors opted to lock in gains, leading the benchmark to plunge 1,644 points during intraday trading. The momentum faltered amid a resurgence of geopolitical tensions, which dampened market sentiment and triggered cautious activity across key sectors. Adding to the pressure, October's CPI inflation was reported at 6.2%, slightly denting investor confidence as concerns resurfaced over potential implications for monetary stability and consumption trends. The KSE-100 Index ultimately closed at 161,282, down by 1,521 points from the previous session's close. Trading activity remained moderate, reflecting a restrained investor stance, with 322mn shares traded on the KSE-100 Index and 898mn shares exchanged in the broader market. The day's volume leaders included WTL (79mn), TELE (77mn), and KEL (72mn). Looking ahead, market direction is expected to remain contingent on the stability of border conditions and the evolving geopolitical landscape. However, optimism continues to brew around Pakistan's "Blue Economy" initiative, a transformative long-term plan aimed at unlocking an estimated USD 100bn potential by 2047 through marine and coastal economic development. Should progress materialize on this front, it could serve as a catalyst for sustained market optimism in the coming months. That said, intermittent profit-taking phases remain a natural part of market cycles. Investors are advised to maintain a prudent approach, monitor evolving dynamics, and focus on fundamentally strong stocks offering long-term growth potential.

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PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	161,281.76	162,803.15	-1,521.39	-0.93%
High	163,384.95	163,935.02	-	-
Low	161,159.26	161,892.59	-	-
Change Point	-1,521.39	1,171.42	-	-
Volume (mn)	321.60	353.00	-31.40	-8.89%
Value Trade (PKR bn)	25.36	32.55	-7.18	-22.07%
Market Cap (PKR bn)	15,583.32	15,736.30	-152.97	-0.97%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	97,970.36	98,852.41	-882.05	-0.89%
High	99,086.22	99,424.38	-	-
Low	97,847.50	98,482.00	-	-
Change Point	-882.05	597.68	-	-
Volume (mn)	897.81	947.86	-50.05	-5.28%
Value Trade (PKR bn)	37.29	47.55	-10.26	-21.58%
Market Cap (PKR bn)	18,469.49	18,639.83	-170.34	-0.91%

Kibor Rates

Tenor	Current	Previous	Change bps
1 Month	11.39%	11.39%	0.00
3 Month	11.17%	11.17%	0.00
6 Month	11.18%	11.18%	0.00
9 Month	11.43%	11.43%	0.00
1 Year	11.45%	11.44%	1.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
Worldcall Telecom Limited	WTL	1.81	-0.04	78.87
Telecard Limited	TELE	12.68	0.81	76.86
K-Electric Limited	KEL	5.52	0.23	71.62
Hascol Petroleum Limited	HASCOL	15.36	-1.71	67.83
First National Equities Limited	FNEL	16.80	-1.87	43.20

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,553,590	-1.41%	53,584,627
O.E.C	2,598,070	-1.47%	8,484,654
FERTILIZER	1,336,654	0.06%	7,931,874
FOOD	1,078,296	-0.28%	50,840,487
CEMENT	1,752,929	-1.12%	25,640,178
CHEMICAL	717,156	-0.71%	7,022,526
AUTOMOBILE	682,550	-0.27%	1,890,710
POWER	537,027	0.19%	85,562,836
TECHNOLOGY	563,070	-1.04%	242,233,792
TEXTILE CO.	417,956	-1.01%	6,680,347
TOBACCO	406,322	0.00%	21,140
PHARMACEUTICALS	488,771	-0.98%	6,520,715

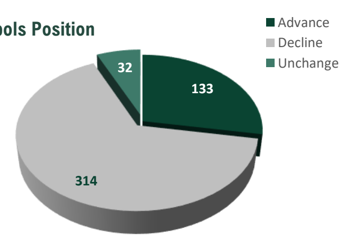
Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
DH Partners Limited	DHPL	51.71	10.00%	4.70
Pakistan Services Limited	PSEL	1,317.11	9.62%	115.61
K-Electric Limited	KEL	5.52	4.35%	0.23
TPL REIT Fund I	TPLRF1	12.03	3.71%	0.43
Pak-Gulf Leasing Company Limited	PGLC	16.60	3.43%	0.55

Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
TRG Pakistan Limited	TRG	73.23	-9.38%	-7.58
Kohinoor Textile Mills Limited	KTML	51.40	-5.84%	-3.19
Sui Southern Gas Company Limited	SSGC	34.00	-4.41%	-1.57
Pakistan Stock Exchange Limited	PSX	44.76	-3.70%	-1.72
Pakgen Power Limited	PKGP	60.98	-3.59%	-2.27

Symbols Position



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Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
Engro Holdings Limited	ENGROH	225.38	-119.81
Mari Energies Limited	MARI	693.54	-119.20
Bank AL Habib Limited	BAHL	185.67	-116.58
MCB Bank Limited	MCB	351.33	-96.82
TRG Pakistan Limited	TRG	73.23	-91.30