Market Review

Peace Pact Ignites Rally: KSE-100 Snaps Seven-Day Losing Streak

The Pakistan Stock Exchange (PSX) witnessed a strong rebound today as renewed optimism swept through the market following reports that Pakistan and Afghanistan have agreed to extend the ceasefire during the Istanbul peace talks. The breakthrough eased geopolitical tensions, restoring investor confidence after a week of sustained pressure. The KSE-100 Index surged by 4,900 points (+3%), closing at the 161,631 level, effectively snapping a seven-day losing streak. The rally reflected broad-based buying, with investors seizing opportunities across key sectors that had seen steep corrections in recent sessions. Trading activity remained robust, underscoring the renewed participation, with 408mn shares traded on the KSE-100 Index and 951mn shares exchanged in the overall market. WTL (98mn), KEL (85mn), and BOP (78mn) led the day's trading charts as volume leaders. Looking ahead, the market's trajectory will hinge on the sustainability of the ceasefire and the stability of regional relations. If peace prevails, bullish momentum is likely to persist, supported by improved investor sentiment and undervalued market levels. However, any flare-up in geopolitical tensions could swiftly temper the rally. Investors are advised to remain prudent, capitalize on short-term gains where appropriate, and maintain positions in fundamentally strong scrips that offer long-term growth potential.

HMFS Sales
sales@hmfs.com.pk

PAKISTAN STOCK EXCHANGE LTD.

KSE-100 Index	Current	Previous	Δ Points	Δ %
Close	161,631.73	156,732.87	4,898.86	3.13%
High	162,194.30	159,507.41	-	-
Low	158,195.54	156,327.60	-	-
Change Point	4,898.86	-1,732.18	-	-
Volume (mn)	408.94	378.02	30.92	8.18%
Value Trade (PKR bn)	31.14	28.51	2.62	9.19%
Market Cap (PKR bn)	15,696.03	15,278.70	417.33	2.73%

KSE-All Share Index	Current	Previous	Δ Points	Δ %
Close	98,254.73	95,664.66	2,590.07	2.71%
High	98,557.57	97,255.34	-	-
Low	96,470.31	95,493.56	-	-
Change Point	2,590.07	-894.50	-	-
Volume (mn)	951.34	846.83	104.50	12.34%
Value Trade (PKR bn)	42.24	37.58	4.65	12.38%
Market Cap (PKR bn)	18,558.96	18,083.60	475.35	2.63%

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	11.19%	11.20%	-1.00
9 Month	11.42%	11.43%	-1.00
1 Year	11.44%	11.44%	0.00

Volume Leaders - All Share Index

Scrip	Symbol	Current	Δ PKR	Vol mn
Worldcall Telecom Limited	WTL	1.81	0.05	98.94
K-Electric Limited	KEL	5.37	-0.05	85.82
The Bank of Punjab	BOP	34.77	1.27	78.46
Waves Corporation Limited	WAVES	14.68	1.25	40.61
Pak Elektron Limited	PAEL	53.08	4.51	39.59

Top Sectors by Market Cap.

Sectors	M.Cap (mn)	Δ %	Volume
BANKS	4,652,048	4.63%	114,613,028
O.E.C	2,623,865	1.42%	10,930,152
FERTILIZER	1,319,758	2.42%	8,943,259
FOOD	1,074,595	1.73%	44,080,747
CEMENT	1,763,500	2.70%	36,600,990
CHEMICAL	717,966	1.31%	11,460,748
AUTOMOBILE	669,534	1.43%	3,394,613
POWER	532,041	0.49%	102,775,341
TECHNOLOGY	566,580	4.25%	184,173,764
TEXTILE CO.	424,194	2.37%	9,549,436
TOBACCO	402,709	1.72%	28,690
PHARMACEUTICALS	491,757	1.81%	9,967,164

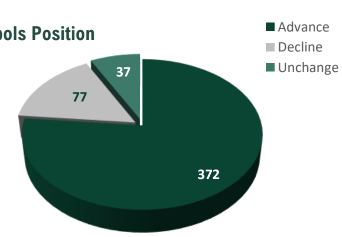
Major Gainers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
Pak Elektron Limited	PAEL	53.08	9.29%	4.51
Bank Alfalah Limited	BAFL	111.22	8.31%	8.53
Pakistan Telecommunication Company Ltd	PTC	37.19	7.02%	2.44
Bank AL Habib Limited	BAHL	194.75	6.81%	12.41
Meezan Bank Limited	MEBL	454.47	6.76%	28.76

Major Losers - KSE -100

Scrip	Symbol	Current	Δ %	Δ PKR
TPL REIT Fund I	TPLRF1	11.15	-8.31%	-1.01
Pakistan Aluminium Beverage Cans Limited	PABC	143.07	-2.12%	-3.10
Habib Metropolitan Bank Limited	HMB	119.11	-1.50%	-1.82
K-Electric Limited	KEL	5.37	-0.92%	-0.05
Pakgen Power Limited	PKGP	61.44	-0.39%	-0.24

Symbols Position



Equity Sales
Tel: 92 (21) 3582 2274
sales@hmfs.com.pk

Equity Research
Tel: 92 (21) 3264 8442
research@hmfs.com.pk

Major Market Movers - KSE-100

Scrip	Symbol	Current	Index contribution
United Bank Limited	UBL	384.87	710.40
Meezan Bank Limited	MEBL	454.47	438.48
Fauji Fertilizer Company Limited	FFC	488.86	351.38
Bank AL Habib Limited	BAHL	194.75	327.01
Habib Bank Limited	HBL	303.83	296.11