

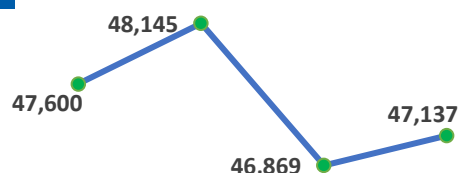
MARKET OVERVIEW

- The KSE – 100 Index dropped 463pts (1% WoW) to settled at 47,137 level. Average trading Volumes improved by 44% to 384Mn shares during the week.
- The market remained volatile during the outgoing week and slipped below 47K mark due to the widening of **Current Account Deficit** and **PKR depreciation**. Moreover, the likely downgrade of Pakistan to MSCI Frontier market also triggered the selling pressure in the Index heavyweights.
- Going forward, the Index is expected to be mixed on the anticipation of the **CPI** numbers and is likely to experience resistance above 47,550 level.

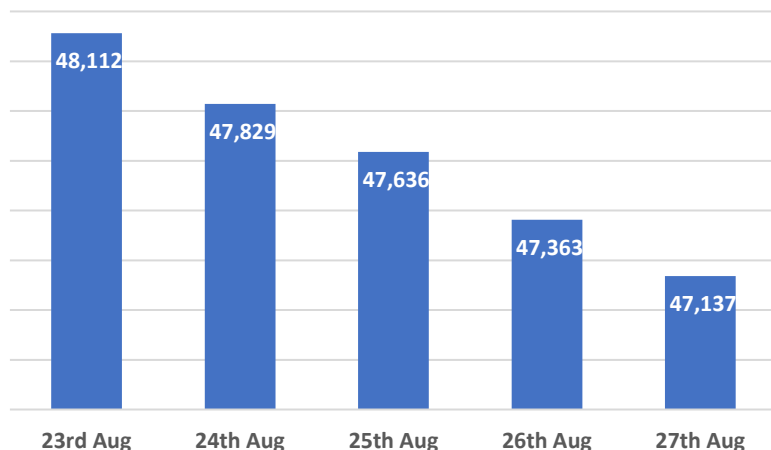
INDEX CLOSING WoW %

INDEX	CLOSING	WoW %
KSE - 100	47,137	-1.0%
KSE – ALL	32,229	-0.7%
KSE – 30	18,913	-1.0%
KMI – ALL	23,250	-0.3%
KMI – 30	76,769	-0.8%
OGTi	12,071	0.6%
BKTI	13,146	0.1%

KSE – 100 INDEX STATISTICS:

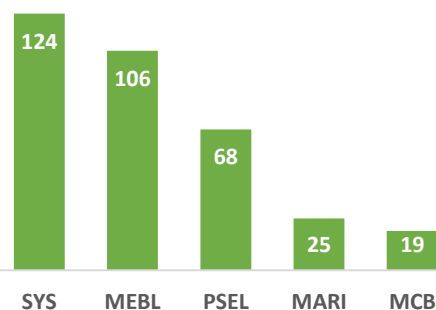


KSE – 100 INDEX DAILY TREND:

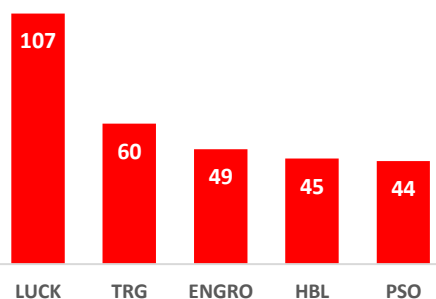


Opening High Low Closing

POSITIVE CONTRIBUTORS (KSE – 100)



NEGATIVE CONTRIBUTORS (KSE – 100)



SECTORS CONTRIBUTION:

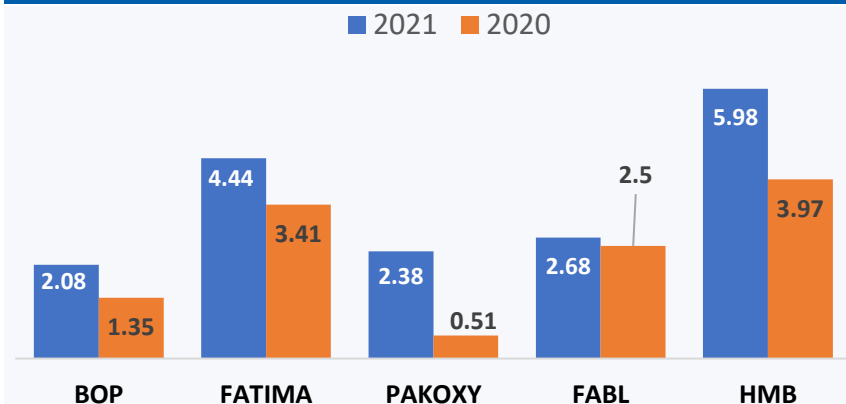
The OMC, Fertilizer, Textile, Power, Engineering, Chemical and Insurance sectors declined the Index by 293 points.

Whereas, the Banks, E&P and Auto sectors contributed 130 points to the Index.

CORPORATE ANNOUNCEMENTS:

- SAZEW** to commence Commercial production of **BAIC** from September
- Avanceon** to Implement Fuel Retail Automation Solution for **GO**
- SPEL** to increase its Authorize Share Capital to Rs 1.5Bn

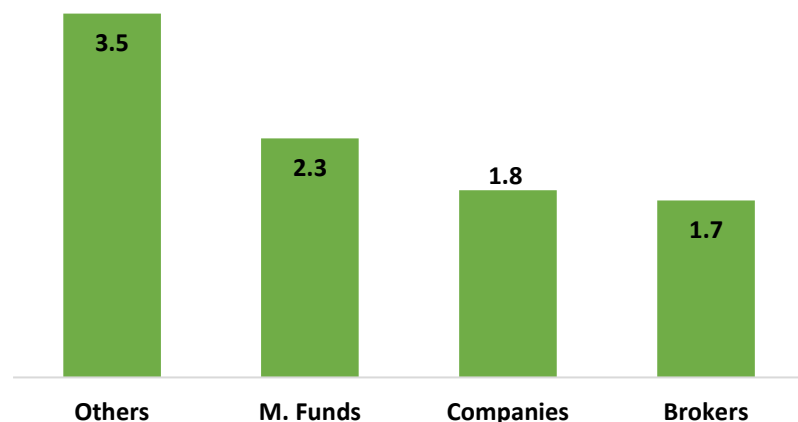
HALF YEAR EPS COMPARISON



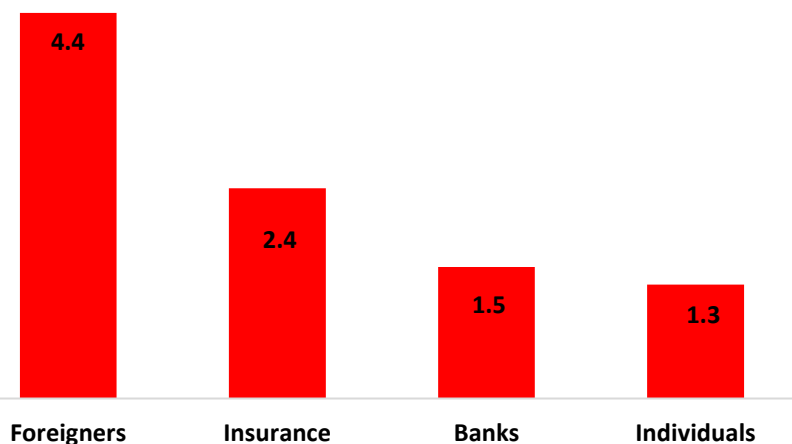
IMPORTANT NEWS

- Foreign exchange: **SBP** reserves fall \$47m to \$17.58b
- Talks with **Russia** end; **PSGP** project makes big headway
- Textile exports** rise 15pc in July
- Food import** bill up 22pc in fiscal year's first month
- PM to launch **Roshan Apna Ghar** on Friday
- PSDP** projects hamstrung by lack of funds
- Tarin urges **PVMA** to go for market-based solutions
- Survey finds 'record improvement' in **Business Confidence**
- IMF's** historic funding takes effect, \$2.7bn for Pakistan
- CCoE** directs re-submission of **Oil Refinery Policy**
- C/A** turns negative by \$773m in July
- Construction of 7,000 units completed under **PM** low cost **Housing Scheme**
- 97pc work on **Pak-Afghan** transit trade deal completed
- Govt seeks to cut **Power Subsidies**
- Profit Repatriation** drops 55% YoY in July

FIPI – LIPI (MAJOR BUYERS)



FIPI – LIPI (MAJOR SELLERS)



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