

- The KSE-100 rose from support to regain the 138k level
- 41 shares rose while 59 fell with SYS PA (+6.9%), UBL PA (+2.08%) and HBL PA (+3.21%) contributed the most to index gains
- FFC PA (-0.7%), LUCK PA (-1.51%) and ENGROH PA (-0.94%) were the biggest index drags
- EFERT PA announced 1HCY25 EPS: PKR 6.34, +10% YoY and DPS: PKR 6.50/share which was inline with expectations
- SYS PA has announced the acquisition of British American Tobacco SAA Services (Private) Limited from British American Tobacco International Holdings (UK) Limited
- FinMin Aurangzeb is in the US to conclude Pak-US trade talks with the final discussions on Pak-US Trade Dialogue will be held this week
- SBP held its benchmark interest rate steady for a second consecutive meeting, choosing caution amid rising inflation risks and lingering tariff uncertainty, expectations were for a rate cut
- Expect higher levels against support @ 137.2k-138.2k to target 140.5k

**KSE-100 Daily Chart**



Source: Bloomberg

30-Jul-25				Top Stocks	Trade Val. (USD mn)	Trade Vol. (mn Shares)	Price (PKR)	Change (%)
KSE100 Index	30-Jul-25		138,412.3	SYS	6.1	13.5	127.5	6.9
Change	Points   %		447.4   0.32	GAL	5.3	2.9	513.5	-3.9
KSE100 Return (WTD)	Points   %		-795.0   -0.57	MLCF	4.1	14.5	79.6	-2.6
KSE100 Return (MTD)	Points   %		12,784.9   10.18	DGKC	3.2	5.4	167.6	-2.5
KSE100 Return (CY25TD)	Points   %		23,285.4   20.23	BNL	2.7	6.7	111.5	-4.2
KSE All Market Cap	PKR bn		16,595.4	GLAXO	2.6	1.7	429.6	1.9
KSE All Market Cap	USD bn		58.6	LUCK	2.4	1.9	356.4	-1.5
KSE All Traded Volume (Regular)	mn shares		425.8	HBL	2.2	2.8	223.2	3.2
KSE All Traded Value (Regular)	PKR bn		25.0	SAZEW	2.2	0.5	1,317.5	-0.5
KSE All Traded Value (Regular)	USD mn		88.3	NBP	2.0	4.7	122.7	1.9

Top Gainers	Price	Change	Change (%)	Index Contribution	Top Losers	Price	Change	Change (%)	Index Contribution
SYS	127.5	8.23	6.9	262.5	GHGL	44.3	-2.50	-5.3	-29.3
BWCL	517.4	28.30	5.8	56.4	BNWM	76.7	-3.68	-4.6	-0.6
TPLRF1	13.2	0.46	3.6	18.4	IBFL	325.1	-13.56	-4.0	-7.0
JVDC	75.6	2.62	3.6	13.4	PABC	147.6	-4.27	-2.8	-12.9
HBL	223.2	6.94	3.2	136.2	POML	211.7	-5.87	-2.7	-0.6

Source: PSX

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