

Investor Kit

Monday, August 3, 2020

Top News

Growth target 'challenging', deficit to be 9pc of GDP in FY20: SBP: KARACHI: The State Bank of Pakistan (SBP) has expressed doubts over the country achieving 2.1 per cent economic growth in FY21 and found the revenue target challenging as well due to decline in activity. For the last fiscal year, the SBP said the fiscal deficit for FY20 is likely to touch 9pc of GDP, where it was 4pc in the first three quarters. <https://www.dawn.com/news/1572089/growth-target-challenging-deficit-to-be-9pc-of-gdp-in-fy20-sbp>

FBR collection jumps by 23.4pc in July:

ISLAMABAD: Revenue collection in July grew by over 15 per cent from last year to Rs300 billion, up Rs57bn or 23.4pc from the target set for the month, data released by Federal Board of Revenue (FBR) spokesperson showed on Thursday. <https://www.dawn.com/news/1572088/fbr-collection-jumps-by-234pc-in-july>

Govt increases petrol price by Rs3.86, diesel by Rs5 for August:

The government on Friday raised the prices of petroleum products by up to Rs6.62 to share the impact of rising international prices with the consumers. <https://www.dawn.com/news/1572173/govt-increases-petrol-price-by-rs386-diesel-by-rs5-for-august>

Locust attack losses could be severe, warns SBP:

KARACHI: The State Bank of Pakistan (SBP) has said that losses due to locust attack in Pakistan could be severe if control operations fail to be effective. According to the SBP report, "The State of Pakistan's Economy", Pakistan has successfully tackled the menace of desert locusts in the past. In 2019, the Ministry of National Food Security and Research's (MNFSR's) Department of Plant Protection (DPP), the lead institution in charge of managing the desert locust threat in the country, surveyed an area of 932,580 hectares, treated 300,595 hectares in three provinces and sprayed 150,839 liters of pesticides during control operations. <https://www.brecorder.com/news/40009368/locust-attack-losses-could-be-severe-warns-sbp>

PSX Data

	KSE30	KSE100	KSE ALL
Close (Curr.)	17,070.0	39,258.4	27,559.3
Close (Prev.)	16,897.7	38,836.3	27,336.5
Chg	172.3	422.2	222.7
% Chg	1.0%	1.1%	0.8%
CYTD	-8.5%	-3.6%	-5.0%
FYTD	7.4%	15.8%	10.3%
Volume (mn)	144.0	261.5	368.7
Value Trade (PKRbn)	10.1	13.7	17.1
Market Cap (USDbn)	1,161.4	1,744.5	7,294.3

Vol Leaders

Scrip	Price	Chg %	Vol
PIBTL	11.25	5.8%	43.31
TRG	47.50	6.0%	27.91
PAEL	32.10	0.1%	18.07
MLCF	32.45	1.1%	16.94
WTL	1.01	6.3%	16.88

Top Gainers

Scrip	Price	Chg	Chg %
JATM	4.5	1.0	28.0%
SMTM	3.8	0.5	16.5%
QUET	7.8	1.0	14.7%
SPLC	0.6	0.0	7.4%
FFLM	4.0	0.4	11.1%

Top Losers

Scrip	Price	Chg	Chg %
TSMF	3.0	-0.7	-18.9%
DEL	4.4	-0.6	-12.8%
FECM	2.0	-0.2	-9.1%
FIBLM	2.3	-0.2	-7.6%
ASHT	12.4	-1.0	-7.5%

Global Markets Indices

Exchange	Last	Previous	Chg %
KSE 100	39,258.4	38,836.3	1.1%
SSE Composite	3,286.8	3,294.6	-0.2%
BSE30	37,736.1	38,071.1	-0.9%
Hang Seng	24,710.6	24,883.1	-0.7%
KOSPI	2,267.0	2,263.2	0.2%
Nikkei 225	22,339.2	22,397.1	-0.3%
FTSE 100	5,990.0	6,131.5	-2.3%
S&P 500	26,313.7	26,539.6	-0.9%
DJIA	10,715.5	10,663.0	0.5%
MSCI EM	1,082.1	1,086.6	-0.4%
MSCI FM	474.4	473.6	0.2%
MSCI AWCI	551.9	555.5	-0.6%

Global Markets Multiples

Exchange	P/E	P/B	DY
KSE 100	7.7	1.0	5.3
SSE Composite	13.9	1.4	2.2
BSE30	23.9	2.7	1.4
Hang Seng	11.4	1.0	3.4
KOSPI	16.4	0.9	1.9
Nikkei 225	22.3	1.7	1.9
FTSE 100	18.7	1.3	3.8
S&P 500	23.7	3.8	2.4
DJIA	31.1	7.0	0.8
MSCI EM	17.7	1.6	2.3
MSCI FM	14.1	1.5	3.4
MSCI AWCI	22.6	2.3	2.2

Portfolio (USDmn)

FIPI	Buy	Sell	Net
30-Jul-20	10.0	-11.7	-1.7
Sector-wise (Net)	Last	MTD	CYTD
Total	-1.7	-68.3	-361.1
Cement	0.0	-6.5	-68.7
Banks	0.1	-12.0	-92.4
Fertiliser	0.4	-5.4	-30.9
Food	0.0	-0.2	-3.0
E&Ps	-0.9	-30.5	-97.3
OMCs	0.0	-1.4	-8.4
Power	0.0	-1.0	-11.6
Tech. & Comm.	0.3	0.9	1.2
Tex. Comp.	0.1	0.8	-13.4
All others	-1.8	-12.9	-36.5

LIPI

Client Type	Last	MTD	CYTD
Individuals	0.3	6.3	79.4
Mutual Funds	1.9	14.1	16.6
Banks/DFIs	-0.1	-10.6	24.7
Companies	-0.6	26.0	46.0
Insurance Comp.	0.7	36.4	183.7
Brokers	-0.2	-5.1	-10.0
Other Org.	-0.2	-2.2	15.1
NBFC	-0.1	1.3	3.4

Fixed Income

PKRVs	Last	Previous	Chg. (bps)
3 month	6.95	6.89	6.0
6 month	6.98	6.87	11.0
12 month	7.02	6.91	11.0
3 year	7.96	7.88	8.0
5 year	8.60	8.52	8.0
7 year	8.84	8.78	6.0
10 year	9.19	9.19	0.0

Forex rates

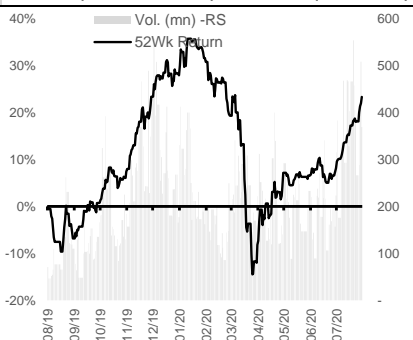
PKR	Last	Previous	Chg %
USD	166.6	166.9	-0.1%
EUR	198.4	196.6	0.9%
JPY	1.6	1.6	0.6%
GBP	219.3	216.7	1.2%
CNY	23.9	23.8	0.3%
USD/PKR	Buy	Sell	
Inter-bank	166.3	166.8	
Open-market	166.3	167.0	

Commodities

International	Last	Previous	Chg %
Arab Light (bbl)	42.7	43.6	-2.1%
Brent (bbl)	42.6	43.1	-1.1%
WTI (bbl)	39.9	41.3	-3.3%
Coal (USD/ton)	56.0	56.0	0.0%
Steel (USD/ton)	278.0	281.0	-1.1%
HRC (USD/ton)	3,901.0	3,901.0	0.0%
CRC (USD/ton)	4,362.0	4,363.0	0.0%
Gold (USD/oz)	1,956.6	1,970.8	-0.7%
Domestic	Current	Previous	Chg. %
Cement	548.0	543.0	0.9%
Sona Urea	1,631.0	1,633.0	-0.1%
DAP	3,386.0	3,384.0	0.1%

Market Performance

KSE 100 (52 Week Return) & Volumes (mn Shares)



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