

Investor Kit

Tuesday, July 21, 2020

Top News

Government bank accounts: Finance ministry frames Cash Management, TSA Rules 2020:

ISLAMABAD: The Ministry of Finance has framed Cash Management and Treasury Single Account (TSA) Rules 2020 aimed at anticipating cash needs, manage cash balance in the government bank accounts and to ensure availability of cash, well-informed sources told Business Recorder.
<https://www.brecorder.com/news/40006515/government-bank-accounts-finance-ministry-frames-cash-management-tsa-rules-2020>

World facing bankruptcy time bomb: study: PARIS:

Governments around the world are scrambling to save companies battered by coronavirus lockdowns but the world is nevertheless facing a massive surge in bankruptcies by a third, a study conducted by a trade insurance firm said Monday.
<https://www.brecorder.com/news/40006511/world-facing-bankruptcy-time-bomb-study>

Two coronavirus vaccines 'produce immune response': PARIS:

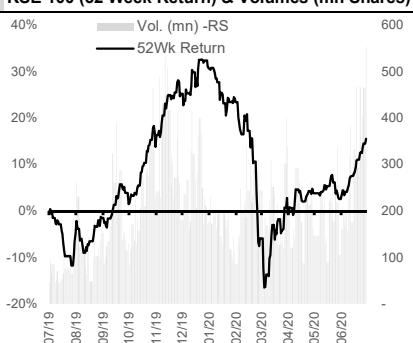
Two COVID-19 vaccine candidates have proven safe for humans and produced strong immune reactions among patients involved in two separate clinical trials, doctors said Monday.
<https://www.brecorder.com/news/40006512/two-coronavirus-vaccines-produce-immune-response>

Country's largest drug trial on Covid-19 proves effective: study: LAHORE:

The preliminary results of country's largest drug trial on Covid-19 "Pakistan Randomized and Observational Trial to Evaluate Coronavirus Treatment (PROTECT)", has not only established the safety of hydroxychloroquine, a drug generally used for treating malaria, in terms of mortality but has also shown significant recovery rate in Covid-19 patients when used in combination with two other drugs- azithromycin and oseltamivir.
<https://www.thenews.com.pk/print/689757-country-s-largest-drug-trial-on-covid-19-proves-effective-study>

Market Performance

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



PSX Data

| | KSE30 | KSE100 | KSE ALL |
|---------------------|----------|----------|----------|
| Close (Curr.) | 16,289.2 | 37,650.6 | 26,886.0 |
| Close (Prev.) | 16,147.8 | 37,330.9 | 26,741.2 |
| Chg | 141.4 | 319.7 | 144.8 |
| % Chg | 0.9% | 0.9% | 0.5% |
| CYTD | -12.7% | -7.6% | -7.3% |
| FYTD | 2.5% | 11.1% | 7.6% |
| Volume (mn) | 183.7 | 328.1 | 553.8 |
| Value Trade (PKRbn) | 10.6 | 14.6 | 19.5 |
| Market Cap (USDbn) | 1,108.3 | 1,673.2 | 7,117.4 |

Vol Leaders

| Scrip | Price | Chg % | Vol |
|--------|-------|-------|-------|
| HASCOL | 14.00 | -0.6% | 32.52 |
| TRG | 39.25 | 4.9% | 27.55 |
| MLCF | 32.94 | 1.8% | 23.00 |
| FCCL | 20.51 | 7.5% | 20.00 |
| LOTCEM | 12.62 | 3.4% | 18.65 |

Top Gainers

| Scrip | Price | Chg | Chg % |
|-------|-------|-----|-------|
| PAKMI | 1.5 | 0.4 | 32.7% |
| TSPL | 4.0 | 0.9 | 30.5% |
| TPLP | 7.6 | 1.0 | 15.2% |
| AGSML | 2.7 | 0.3 | 13.4% |
| DNCC | 9.0 | 1.0 | 12.5% |

Top Losers

| Scrip | Price | Chg | Chg % |
|-------|-------|------|--------|
| TRSM | 1.4 | -0.4 | -23.8% |
| DWSM | 2.4 | -0.3 | -11.1% |
| DKL | 2.6 | -0.3 | -10.8% |
| FECM | 2.3 | -0.2 | -9.2% |
| SPLC | 0.6 | 0.0 | -8.3% |

Global Markets Indices

| Exchange | Last | Previous | Chg % |
|---------------|----------|----------|-------|
| KSE 100 | 37,650.6 | 37,330.9 | 0.9% |
| SSE Composite | 3,314.1 | 3,214.1 | 3.1% |
| BSE30 | 37,419.0 | 37,020.1 | 1.1% |
| Hang Seng | 25,058.0 | 25,089.2 | -0.1% |
| KOSPI | 2,198.2 | 2,201.2 | -0.1% |
| Nikkei 225 | 22,717.5 | 22,696.4 | 0.1% |
| FTSE 100 | 6,261.5 | 6,290.3 | -0.5% |
| S&P 500 | 26,680.9 | 26,672.0 | 0.0% |
| DJIA | 10,952.1 | 10,645.2 | 2.9% |
| MSCI EM | 1,064.5 | 1,055.1 | 0.9% |
| MSCI FM | 476.2 | 480.8 | -1.0% |
| MSCI AWCI | 552.6 | 548.1 | 0.8% |

Global Markets Multiples

| Exchange | P/E | P/B | DY |
|---------------|------|-----|-----|
| KSE 100 | 7.4 | 1.0 | 5.8 |
| SSE Composite | 13.9 | 1.4 | 2.2 |
| BSE30 | 22.8 | 2.7 | 1.5 |
| Hang Seng | 11.6 | 1.0 | 3.5 |
| KOSPI | 16.0 | 0.9 | 2.0 |
| Nikkei 225 | 22.4 | 1.7 | 1.9 |
| FTSE 100 | 19.4 | 1.5 | 3.7 |
| S&P 500 | 23.9 | 3.8 | 2.4 |
| DJIA | 32.4 | 7.4 | 0.8 |
| MSCI EM | 17.2 | 1.6 | 2.4 |
| MSCI FM | 14.3 | 1.5 | 3.3 |
| MSCI AWCI | 22.9 | 2.3 | 2.2 |

Portfolio (USDmn)

| FIPI | Buy | Sell | Net |
|--------------------------|-------------|--------------|---------------|
| 20-Jul-20 | 9.6 | -11.4 | -1.8 |
| Sector-wise (Net) | Last | MTD | CYTD |
| Total | -1.8 | -51.1 | -343.9 |
| Cement | -0.9 | -6.4 | -68.7 |
| Banks | -0.9 | -10.4 | -90.8 |
| Fertiliser | -0.3 | -4.8 | -30.3 |
| Food | 0.0 | -0.1 | -2.9 |
| E&Ps | 0.3 | -23.5 | -90.3 |
| OMCs | 0.0 | -0.7 | -7.8 |
| Power | -0.5 | 0.1 | -10.5 |
| Tech. & Comm. | 0.1 | -0.6 | -0.3 |
| Tex. Comp. | 0.1 | 0.3 | -13.8 |
| All others | 0.2 | -5.0 | -28.6 |

LIPI

| Client Type | Last | MTD | CYTD |
|-----------------|------|-------|-------|
| Individuals | 5.4 | 14.1 | 87.3 |
| Mutual Funds | -1.5 | 2.6 | 5.1 |
| Banks/DFIs | -2.8 | -10.0 | 25.4 |
| Companies | 1.2 | 11.4 | 31.5 |
| Insurance Comp. | 0.7 | 30.1 | 177.4 |
| Brokers | -1.0 | 3.0 | -1.9 |
| Other Org. | -0.1 | -0.9 | 16.5 |
| NBFC | -0.1 | 0.6 | 2.6 |

Fixed Income

| PKRVs | Last | Previous | Chg. (bps) |
|----------|------|----------|------------|
| 3 month | 6.50 | 6.48 | 2.0 |
| 6 month | 6.51 | 6.51 | 0.0 |
| 12 month | 6.53 | 6.51 | 2.0 |
| 3 year | 7.50 | 7.44 | 6.0 |
| 5 year | 8.10 | 8.04 | 6.0 |
| 7 year | 8.35 | 8.33 | 2.0 |
| 10 year | 8.77 | 8.76 | 1.0 |

Forex rates

| PKR | Last | Previous | Chg % |
|-----|-------|----------|-------|
| USD | 168.4 | 167.3 | 0.7% |
| EUR | 192.0 | 191.0 | 0.5% |
| JPY | 1.6 | 1.6 | 0.1% |
| GBP | 212.3 | 210.0 | 1.1% |
| CNY | 24.1 | 23.9 | 0.9% |

USD/PKR

| | Buy | Sell |
|-------------|-------|-------|
| Inter-bank | 166.2 | 166.7 |
| Open-market | 166.5 | 167.5 |

Commodities

| International | Last | Previous | Chg % |
|------------------|----------------|-----------------|---------------|
| Arab Light (bbl) | 42.6 | 42.9 | -0.6% |
| Brent (bbl) | 42.9 | 43.1 | -0.6% |
| WTI (bbl) | 40.8 | 40.6 | 0.5% |
| Coal (USD/ton) | 57.4 | 57.4 | 0.0% |
| Steel (USD/ton) | 264.0 | 259.5 | 1.7% |
| HRC (USD/ton) | 3,879.0 | 3,882.0 | -0.1% |
| CRC (USD/ton) | 4,330.0 | 4,330.0 | 0.0% |
| Gold (USD/oz) | 1,817.8 | 1,810.4 | 0.4% |
| 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% |

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