

Investor Kit

Tuesday, May 5, 2020

Top News

PSE delays Rs200bn sukuk: KARACHI: The Pakistan Energy Sukuk-II (PES-II), a government-guaranteed Shariah-compliant security of Rs200 billion, which was to be on offer through the book building in the stock exchange from Tuesday has been delayed by 7-10 days, it was learnt on Monday evening.
<https://www.dawn.com/news/1554605/pse-delays-rs200bn-sukuk>

Pakistan likely to face petrol, diesel shortage in May, June: KARACHI: Pakistan is likely to run out of petrol and diesel in May and June to meet local demand as the government's lack of firmness in resolving differences over lockdown compounded impact of the pandemic-driven supply chain disruption, sources said on Monday.
<https://www.thenews.com.pk/print/654079-pakistan-likely-to-face-petrol-diesel-shortage-in-may-june>

Urea sales see double-digit decline in April: KARACHI: Urea sales are estimated at 240,000 tons in April, showing a double-digit decline compared to the corresponding month a year earlier and the previous month, as the virus lockdown hurt its sales during the month, a brokerage reported on Monday.
<https://www.thenews.com.pk/print/654084-urea-sales-see-double-digit-decline-in-april>

Lockdown to be lifted only gradually: PM: ISLAMABAD: The Prime Minister, Imran Khan, said on Monday that lockdown would be further eased gradually to provide livelihood to the low-income group and daily wagers.
<https://epaper.brecorder.com/2020/05/05/1-baae/835857-news.html>

Weekly SPI up 0.72 percent: ISLAMABAD: The Sensitive Price Indicator- (SPI) based inflation for the week ended on April 30, increased 0.72 percent for the combined consumption group, Pakistan Bureau of Statistics (PBS) reported on Monday.
<https://www.thenews.com.pk/print/654086-weekly-spi-up-0-72-percent>

PSX Data

	KSE30	KSE100	KSE ALL
Close (Curr.)	14,956.3	33,916.6	23,920.3
Close (Prev.)	15,081.8	34,111.6	23,937.6
Chg	-125.5	-195.0	-17.3
% Chg	-0.8%	-0.6%	-0.1%
CYTD	-19.8%	-16.7%	-17.5%
FYTD	-5.9%	0.0%	-4.3%
Volume (mn)	96.0	166.1	216.6
Value Trade (PKRbn)	6.2	8.1	9.4
Market Cap (USDbn)	1,017.6	1,535.2	6,372.1

Vol Leaders

Script	Price	Chg %	Vol
MLCF	27.38	-2.8%	18.32
HASCOL	14.94	-1.6%	13.61
UNITY	11.89	3.1%	12.17
TRG	18.56	5.2%	11.46
KEL	2.90	-3.7%	10.37

Top Gainers

Script	Price	Chg	Chg %
RICL	5.5	1.0	22.4%
SPLC	0.6	0.1	22.2%
MDTL	1.3	0.2	22.0%
HUMNL	5.8	1.0	20.7%
BPBL	6.0	1.0	19.8%

Top Losers

Script	Price	Chg	Chg %
PIM	3.4	-1.0	-23.0%
CWSM	1.4	-0.2	-10.7%
PIL	0.6	-0.1	-10.0%
MSCL	9.1	-0.9	-8.9%
FEM	3.2	-0.3	-8.3%

Global Markets Indices

Exchange	Last	Previous	Chg %
KSE 100	33,916.6	34,111.6	-0.6%
SSE Composite	2,860.1	2,860.1	0.0%
BSE30	31,715.4	33,717.6	-5.9%
Hang Seng	23,613.8	24,643.6	-4.2%
KOSPI	1,895.4	1,947.6	-2.7%
Nikkei 225	19,619.4	20,193.7	-2.8%
FTSE 100	5,753.8	5,901.2	-2.5%
S&P 500	23,749.8	24,345.7	-2.4%
DJIA	8,834.1	8,718.2	1.3%
MSCI EM	888.0	916.8	-3.1%
MSCI FM	442.4	448.9	-1.4%
MSCI AWCI	475.3	478.6	-0.7%

Global Markets Multiples

Exchange	P/E	P/B	DY
KSE 100	6.2	1.0	6.8
SSE Composite	11.4	1.2	2.6
BSE30	16.7	2.2	1.9
Hang Seng	10.7	0.9	3.8
KOSPI	13.0	0.8	2.4
Nikkei 225	16.4	1.4	2.3
FTSE 100	16.1	1.4	4.5
S&P 500	21.3	3.4	2.7
DJIA	26.6	6.2	1.0
MSCI EM	13.4	1.2	3.0
MSCI FM	11.6	1.4	4.4
MSCI AWCI	18.7	1.9	2.6

Portfolio (USDmn)

FIPI	Buy	Sell	Net
4-May-20	3.9	-10.5	-6.6
Sector-wise (Net)	Last	MTD	CYTD
Total	-6.6	-6.6	-213.8
Cement	-1.3	-1.3	-55.9
Banks	-0.3	-0.3	-54.1
Fertiliser	-0.6	-0.6	-11.3
Food	0.0	0.0	-1.9
E&Ps	-3.4	-3.4	-58.2
OMCs	-0.4	-0.4	0.3
Power	-0.3	-0.3	-7.0
Tech. & Comm.	-0.1	-0.1	0.5
Tex. Comp.	0.0	0.0	-6.9
All others	-0.1	-0.1	-19.3

LIPI

Client Type	Last	MTD	CYTD
Individuals	3.9	3.9	18.0
Mutual Funds	-2.0	-2.0	-0.1
Banks/DFIs	-0.3	-0.3	42.0
Companies	1.9	1.9	13.4
Insurance Comp.	2.6	2.6	135.6
Brokers	-0.5	-0.5	-5.2
Other Org.	0.9	0.9	9.7
NBFC	0.0	0.0	0.3

Fixed Income

PKRVs	Last	Previous	Chg. (bps)
3 month	7.90	7.97	-7.0
6 month	7.50	7.50	0.0
12 month	7.10	7.13	-3.0
3 year	7.21	7.25	-4.0
5 year	7.60	7.63	-3.0
7 year	7.95	7.99	-4.0
10 year	8.10	8.11	-1.0

Forex rates

PKR	Last	Previous	Chg %
USD	160.1	160.6	-0.3%
EUR	174.5	175.8	-0.7%
JPY	1.5	1.5	0.2%
GBP	199.1	202.2	-1.5%
CNY	22.7	22.7	-0.3%

USD/PKR

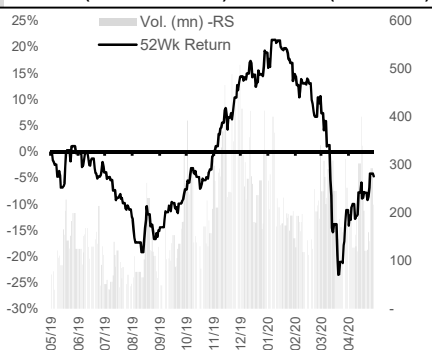
	Buy	Sell
Inter-bank	160.2	160.7
Open-market	158.0	160.5

Commodities

International	Last	Previous	Chg %
Arab Light (bbl)	19.1	20.6	-7.2%
Brent (bbl)	24.8	23.7	4.4%
WTI (bbl)	20.4	18.8	8.2%
Coal (USD/ton)	53.0	52.6	0.8%
Steel (USD/ton)	243.0	245.0	-0.8%
HRC (USD/ton)	3,373.0	3,373.0	0.0%
CRC (USD/ton)	3,748.0	3,748.0	0.0%
Gold (USD/oz)	1,702.1	1,686.5	0.9%
Domestic	Current	Previous	Chg. %
Cement	540.0	539.0	0.2%
Sona Urea	1,694.0	1,705.0	-0.6%
DAP	3,415.0	3,426.0	-0.3%

Market Performance

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



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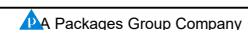

www.jamapunji.pk

Source: Bloomberg, PSX, NCCPL, SBP, PBS, Forex.pk, IGI Research

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