



01 August, 2022 – 05 August, 2022

# Weekly Newsletter

The Zeal, Pakistan

<https://thzeal.com>

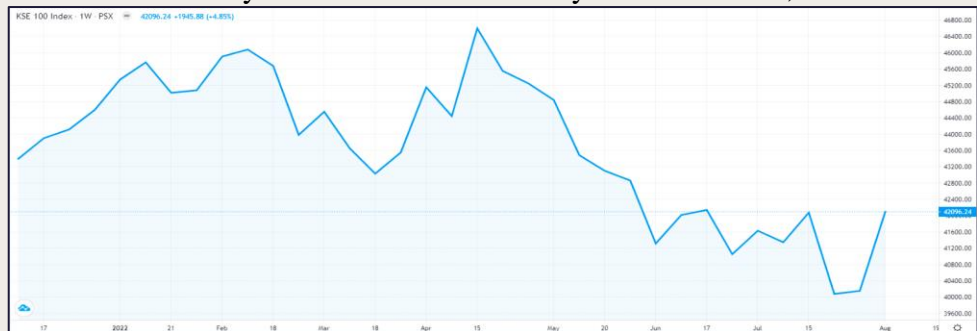
[info@thzeal.com](mailto:info@thzeal.com)

## INSIDE THIS ISSUE

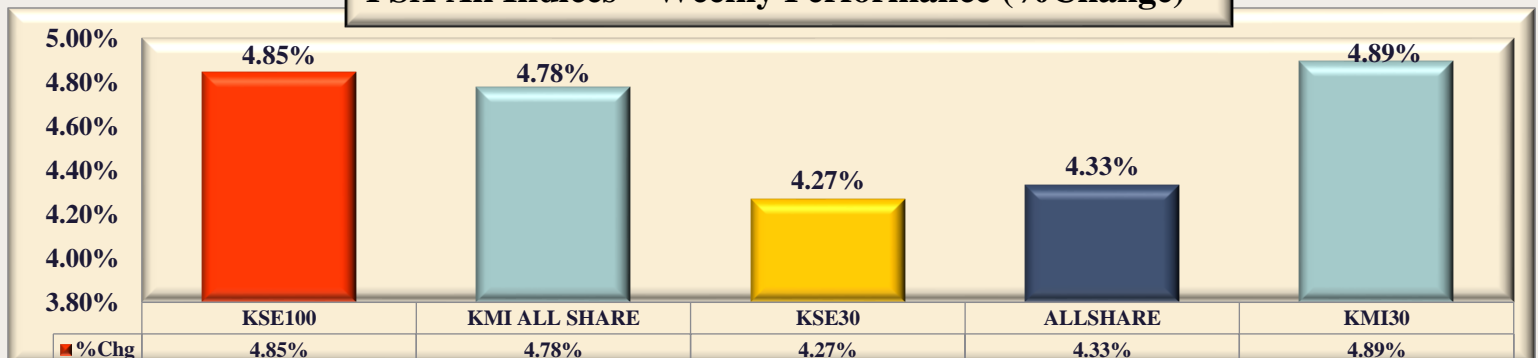
- KSE-100 Index weekly performance review
- PSX All Indices weekly performance review
- PSX Sector Analysis – Market Cap & Return
- PSX Top industries Performance Analysis
- KSE-100 Weekly Top Gainers & Losers
- FIPI & LIPI Data analysis
- Major Economic and Fundamental news
- KSE100 Technical Analysis
- Major currencies, Indices and commodities weekly performance
- Disclaimer

## KSE-100 Index Weekly Performance Review:

Last week the benchmark KSE-100 Index inversed its losses and gain 1945.88pts (4.85%) compared to the previous week. KSE-100 index started to unfold for last week from 40,218.66 and overturned with positive momentum around at 42,168.08. And in last days of the week market was unable to set any correction and weekly closed at 42,096.24 level.

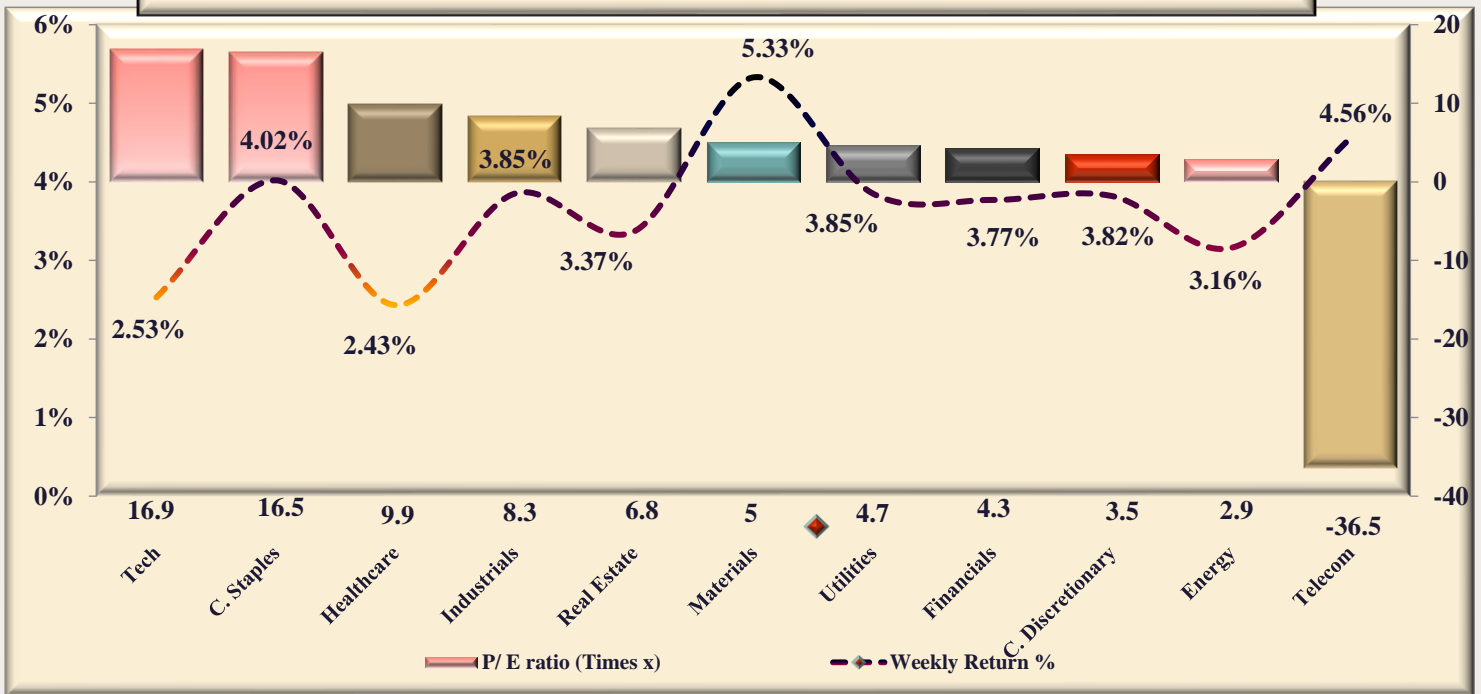


## PSX All Indices – Weekly Performance (%Change)

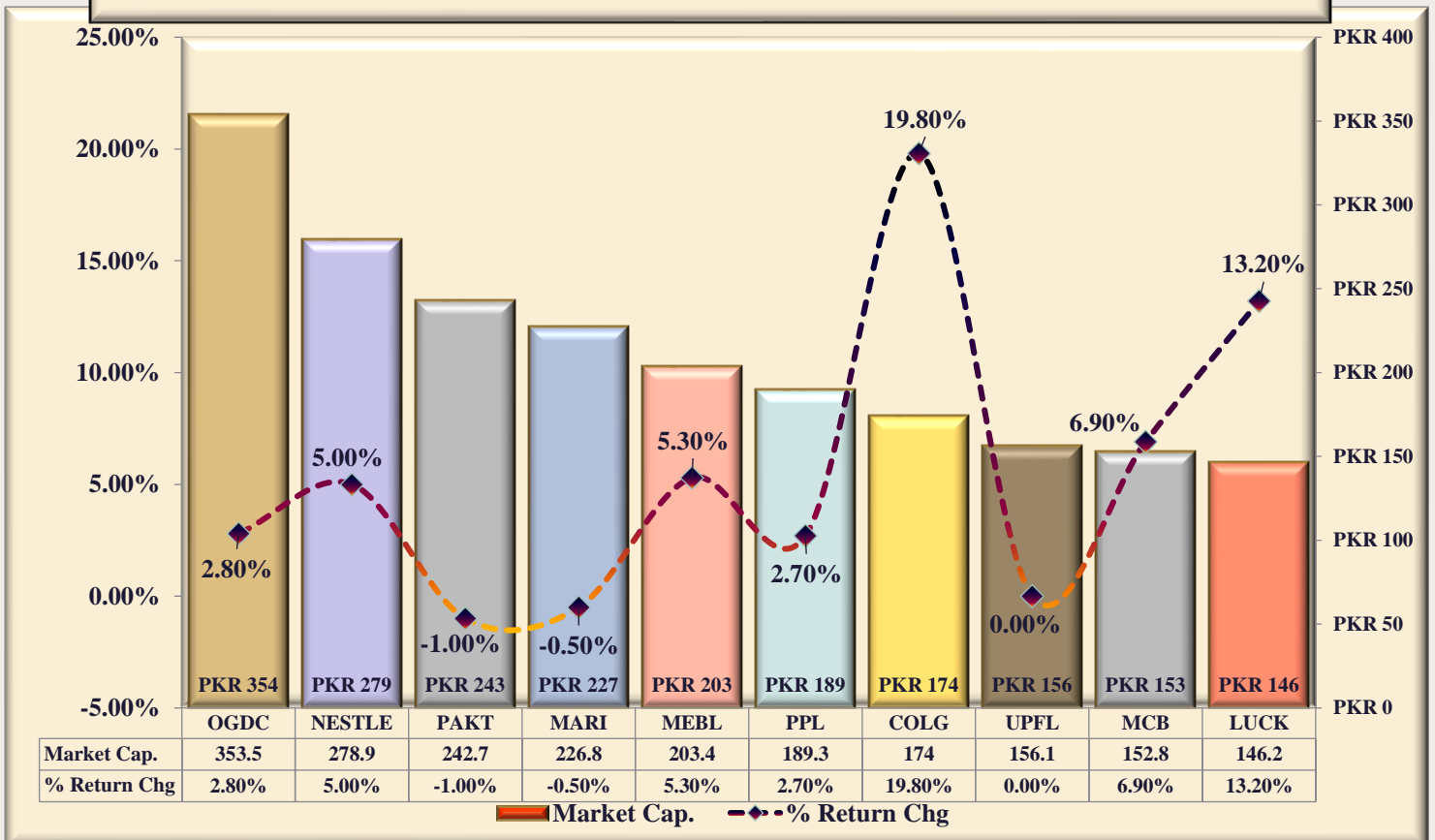


<https://www.investing.com/indices/pakistan-indices>

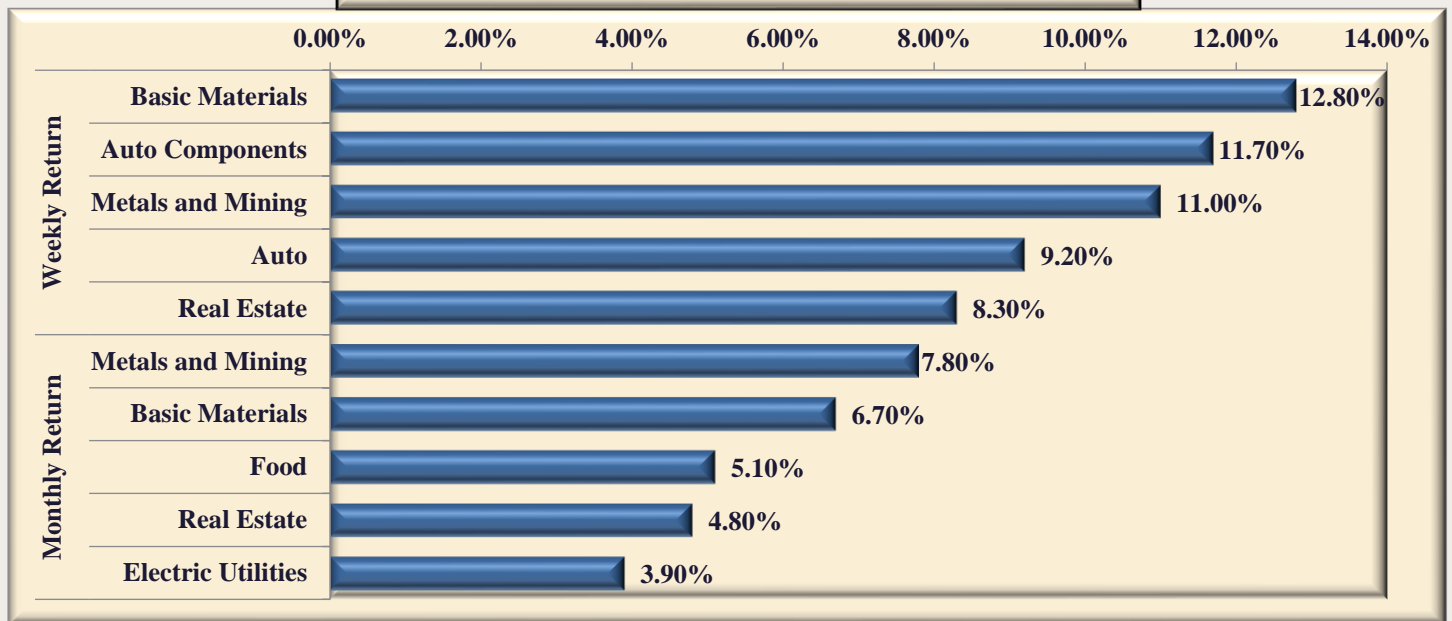
## PSX Sector Analysis - P/E ratio & Weekly return (Times x & % Chg.)



## PSX Top 10 Market Cap Companies & Weekly return (PKR Bil. & %Chg)

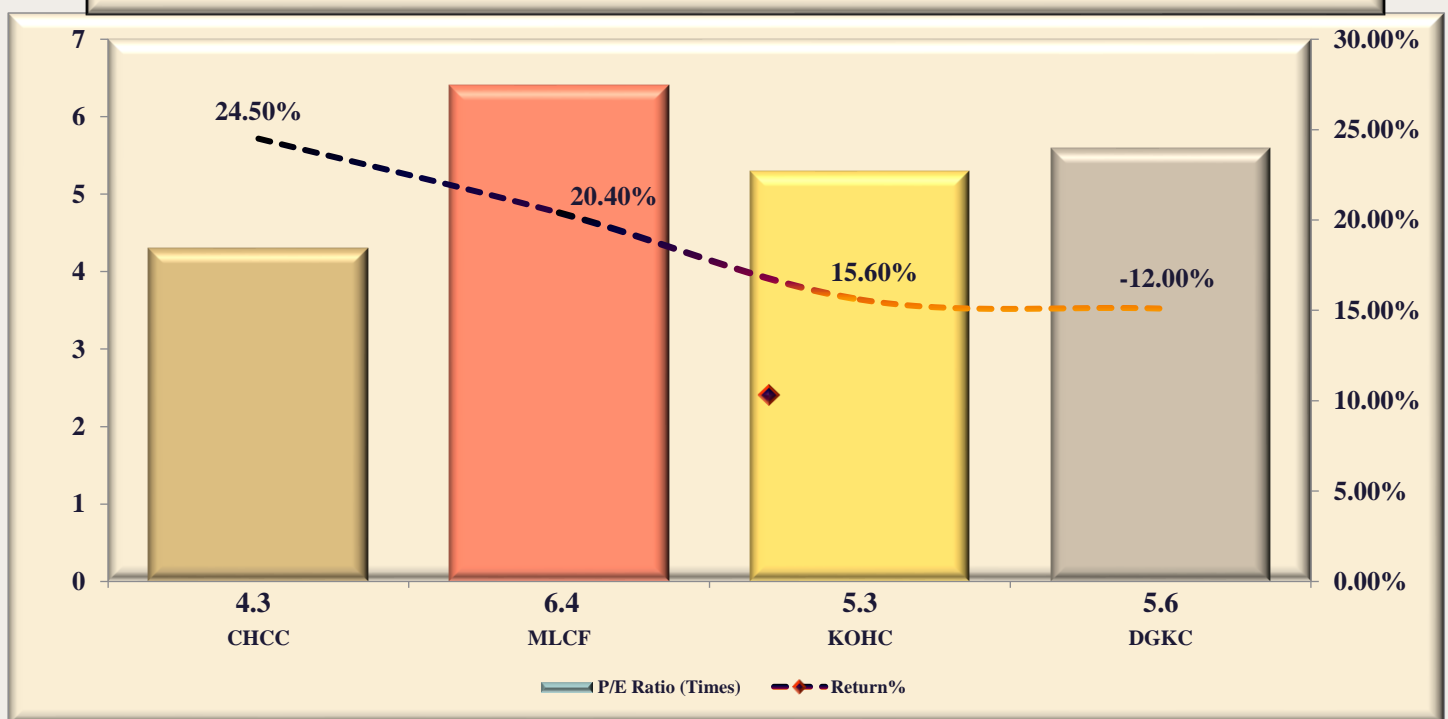


## PSX Industries - Weekly and Monthly Returns:



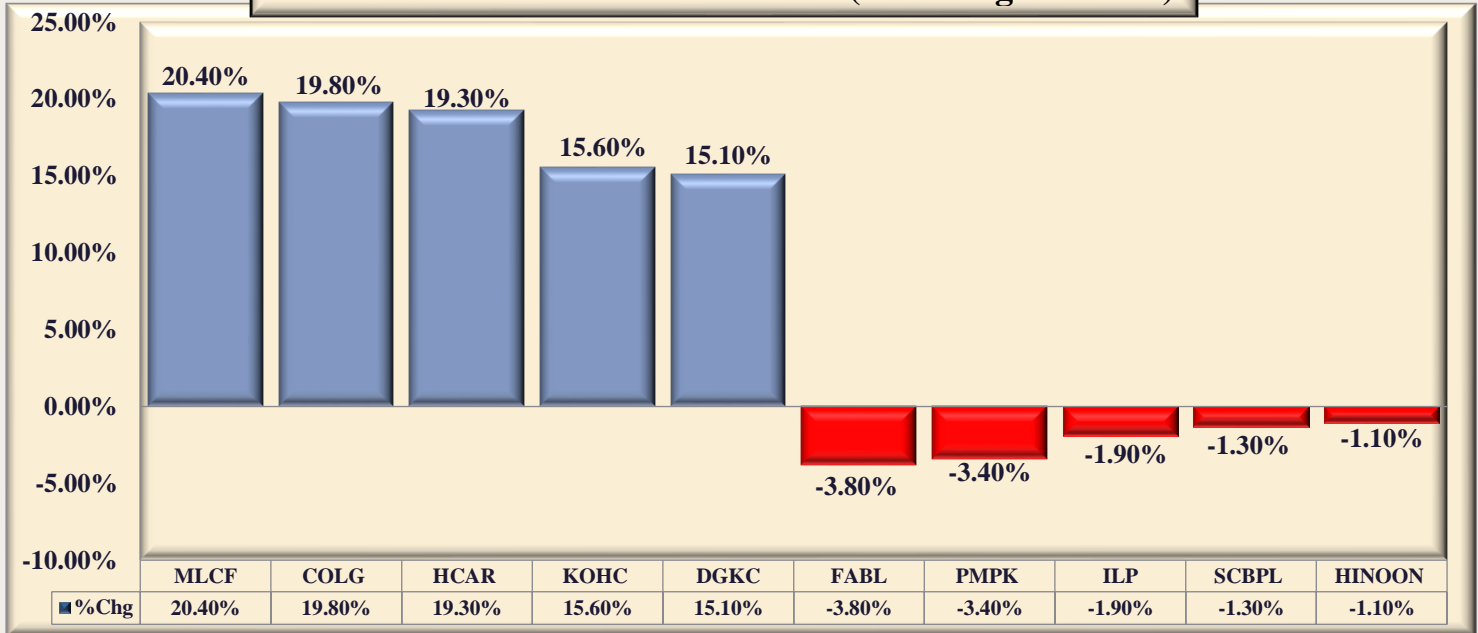
<https://simplywall.st/markets/pk>

## PSX Top industry: Gainers - P/E Ratio Analysis (Return%, P/B) Times)

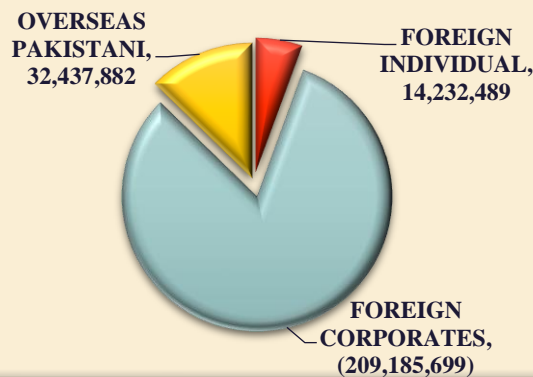


<https://simplywall.st/markets/pk>

## PSX Gainers & Losers of the Week:(% Change in Price)



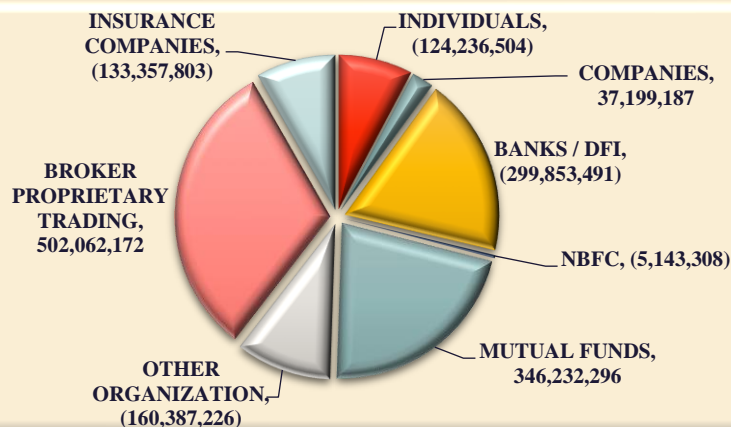
## FIPI Net Buy / (Sell) - PKR



### FIPI Analysis:

FIPI (Data of Foreign Individual, Foreign Corporates & Overseas Pakistani), displayed an overall net-selling trend this week as compared to the previous week.

## LIPI Net Buy / (Sell) - PKR



### LIPI Analysis:

LIPI displayed an overall net-buying trend this week as compared to the previous week.

## Weekly PSX Earnings:

SYMBOL	NAME	DATE	QUARTER	EPS	EPS CUM	DIVIDEND
CEPB	Century Paper & Board Mills Ltd.	08-05-22	FY22	2.05	10.90	
KOHE	Kohinoor Energy Ltd.	08-05-22				15%
LOTCEM	Lotte Chemical (Pak) Ltd.	08-05-22	HY22	1.84	3.57	40%
LUCK	Lucky Cement Ltd.	08-05-22	FY22	27.15	91.22	
EPQL	Engro Powergen Qadirpur Ltd.	08-04-22	HY22	0.79	1.25	50%
MARI	Mari Petroleum Company Ltd.	08-04-22	FY22	42	247.84	620%
SKRS	Sakrand Sugar Mills Ltd. (D)	08-04-22	FY21	-4.34	-8.06	
UBL	United Bank Ltd.	08-03-22	HY22	1.91	9.69	40%
GADT	Gadoon Textile Mills Ltd.	08-02-22	FY22	24.87	203.84	200%
ICI	I.C.I Pakistan Ltd.	08-02-22	FY22	7.18	91.66	150%
WAVES	Waves Singer Pakistan Ltd.	08-02-22	1Q22	0.38	0.38	
WAVES	Waves Singer Pakistan Ltd.	08-02-22	CY21	-0.45	1.13	
NCL	Nishat (Chunian) Ltd.	08-02-22				S.D 0.78%
COLG	Colgate Palmolive (Pak) Ltd.	08-01-22	FY22	17.01	80.66	280%
SSGC	Sui Southern Gas Company Ltd.	08-01-22	1Q21	-0.82	-0.82	
EXIDE	Exide Pakistan Ltd.	08-01-22	1Q23	6.47	6.47	
HWQS	Haseeb Waqas Sugar Mills Ltd. (D)	08-01-22	3Q22	-2.43	-2.27	
AGSML	Abdullah Shah Ghazi Sugar Mills Ltd.	08-01-22	3Q22	-0.24	-1.63	

## Major News & Events:

- [Pakistan equities remained bullish throughout the day owing to the positive triggers as the KSE-100 index closed today's trading session at 42,096.24 with a gain of 670.87 points, witnessing an intraday high of 42,167.48.](#)
- [The price of gold in the Pakistan domestic market fell by Rs1,300 per tola and Rs1,115 per 10 grams on Friday as rupee continue to appreciate against dollar.](#)
- [Oil prices settled higher on Friday, recouping some of this week's losses on strong U.S. job growth data, but closed the week at their lowest levels since February, rattled by worries a recession could hit fuel demand.](#)
- [Pakistan has met all prior conditions for the combined 7th and 8th review under the Extended Fund Facility \(EFF\) programme and the International Monetary Fund \(IMF\) Executive Board meeting is tentatively planned for late August.](#)

## Karachi 100 Technical Analysis:



As you can see, the above-mentioned chart KSE-100 shows that market opened with a negative momentum and tested below the support level of 39,762.50. Currently we have seen that the KSE-100 took upside down move with positive momentum and after that it closed at 42,096.24 points below its major supply level. So, for the upcoming week there are two possible scenarios for the market. Firstly, the upside unfolding could lead this movement up to supply area next 42,800 – 43,400 points and if the market is unable to sustain this level, then we would see a second scenario with a downside move up to level 41,300 – 40,700 points. RSI is standing below the area of 50 and MACD is showing decrease in bullish momentum.

**Keep in mind:** though, monthly chart shows a negative momentum, many stocks can quickly become overwhelming. You will need to stay up-to-date and also cautious. Break out of level of 38,800 points opens the door of the market towards 37,800.

### Technical Indicators:

Name	Value	Action
RSI (14)	46.24	Neutral
STOCH (9,6)	92.111	Overbought
STOCHRSI (14)	80.231	Overbought
MACD (12,26)	-1046.15	Sell
ADX (14)	35.156	Neutral
Williams %R	-8.945	Overbought
CCI (14)	-63.1286	Sell
ATR (14)	1621.048	Less Volatility

### Moving Averages:

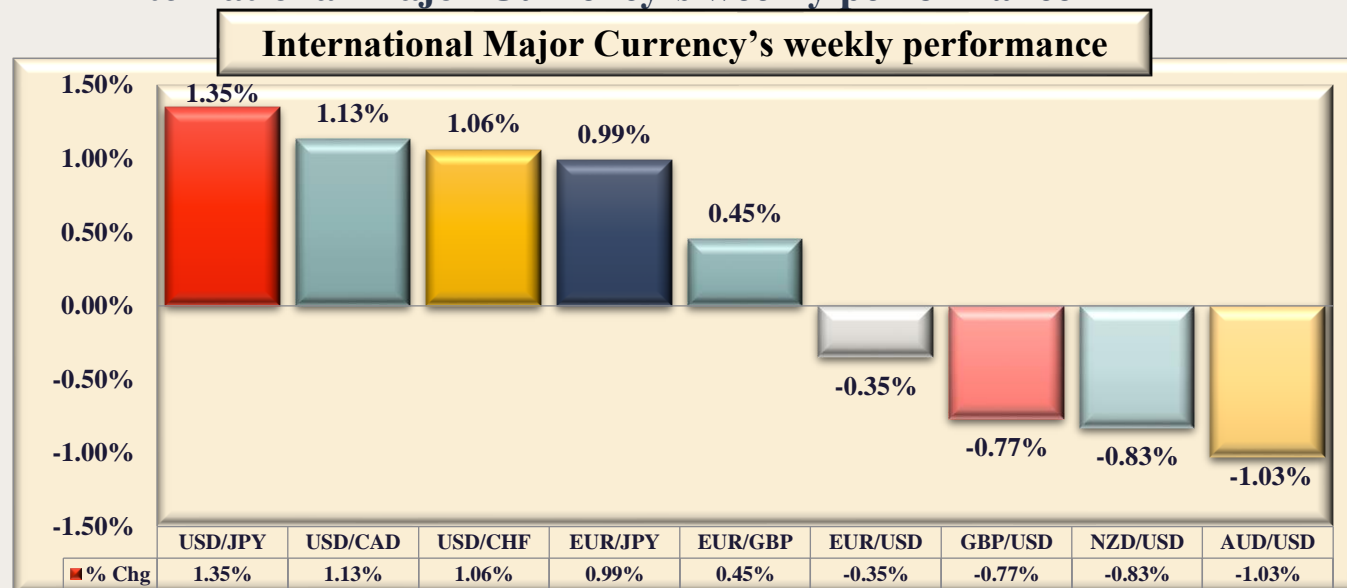
Period	Simple	Exponential
MA5	41148.56	41271.77
	Buy	Buy
MA10	41389.53	41764.21
	Buy	Buy
MA20	42936.83	42483.99
	Sell	Sell
MA50	44293.75	43632.65
	Sell	Sell
MA100	44506.74	43242.6
	Sell	Sell
MA200	40623.64	41983.97
	Buy	Buy



## Pivot points of KSE-100:

Name	S3	S2	S1	Pivot Points	R1	R2	R3
Classic	38610.6	39107.85	39629.1	<b>40126.35</b>	40647.6	41144.85	41666.1
Fibonacci	39107.85	39496.92	39737.28	<b>40126.35</b>	40515.42	40755.78	41144.85
Camarilla	39870.27	39963.63	40057	<b>40126.35</b>	40243.72	40337.08	40430.45
Woodie's	38622.62	39113.86	39641.12	<b>40132.36</b>	40659.62	41150.86	41678.12
DeMark's	-	-	39877.73	<b>40250.67</b>	40896.23	-	-

## International Major Currency's weekly performance



- DXY attempts a consolidative move in the 106.577 region on Friday amidst a cautious tone prior to the release of July's Nonfarm Payrolls on Friday. The short-term constructive stance is expected to remain supported by the 6-month support line, today near 104.30.
- EUR/USD came under heavy negative momentum and dropped toward 1.0150 in the American session on Friday. The data from the US showed that Nonfarm Payrolls rose by 528K in July, compared to the market expectation of 250K, and provided a boost to the greenback.
- GBP/USD tumbled sharply toward 1.2000 on Friday after the impressive US July jobs report triggered a dollar rally. Nonfarm Payrolls grew at a much stronger pace than expected and annual wage inflation stayed unchanged at 5.2%, reviving hawkish Fed bets.

## Major Closing Exchange rates (At 05 August, 2022):

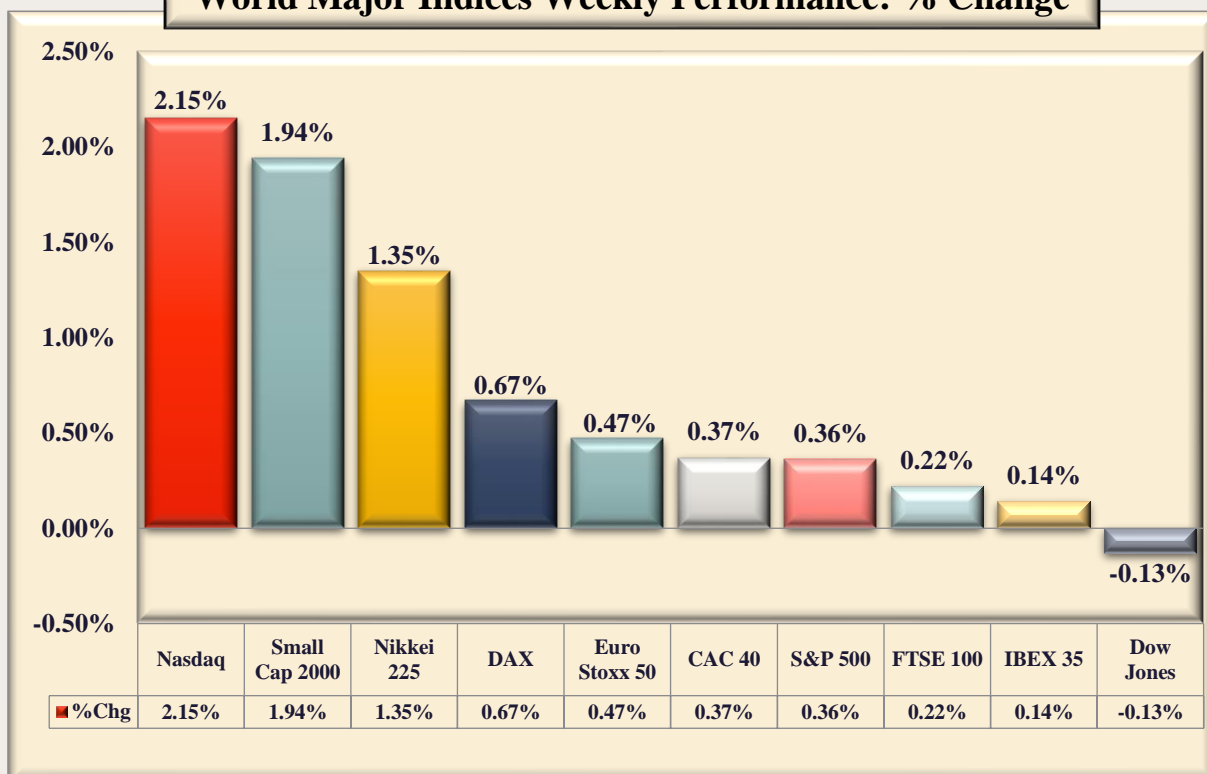
Currency	Symbol	Buying	Selling
Australian Dollar	AUD	156.26	157.51
Bahrain Dinar	BHD	596.61	601.11
Canadian Dollar	CAD	176.88	178.23
China Yuan	CNY	33.24	33.49
Euro	EUR	223	226.5
Japanese Yen	JPY	1.65	1.73
Kuwaiti Dinar	KWD	733.39	738.39
New Zealand \$	NZD	141.23	142.43
Qatari Riyal	QAR	61.63	62.13
Saudi Riyal	SAR	59.5	60.5
Swiss Franc	CHF	234.51	236.26
U.A.E Dirham	AED	60	61
UK Pound Sterling	GBP	265	270
US Dollar	USD	218	226

## Major News & Events Effect Major Currencies:

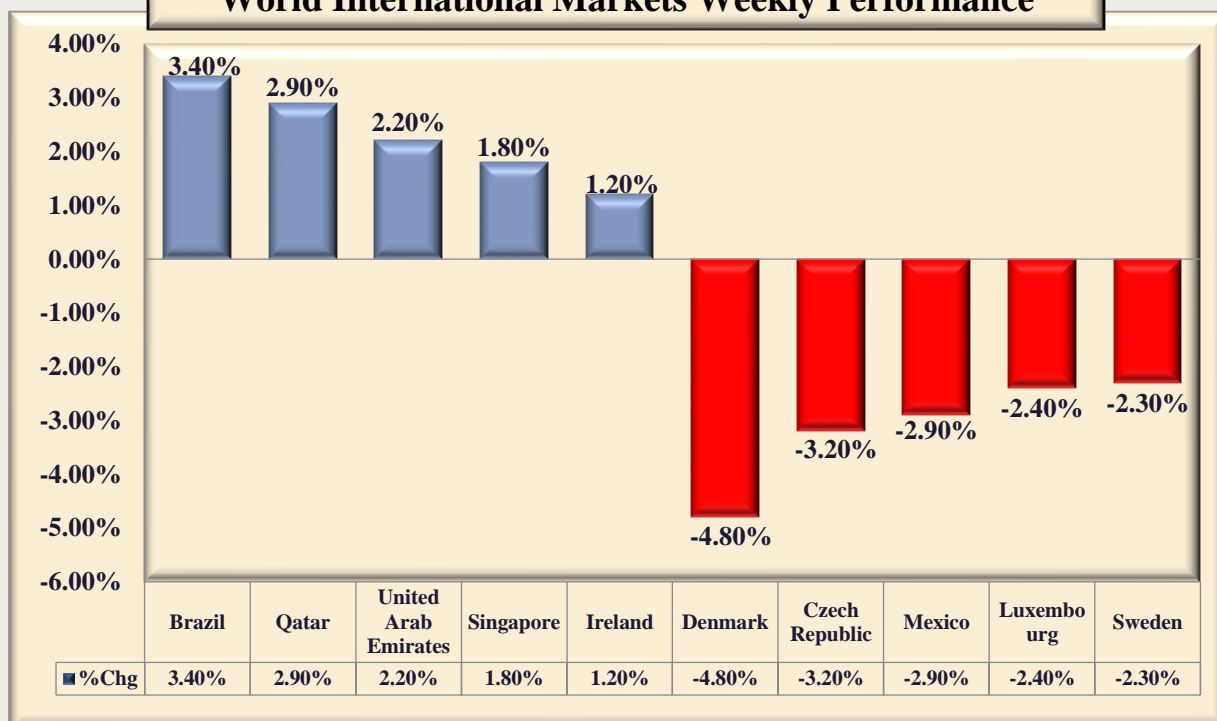
Date	Currency	News & Events
Tue, Aug 2	AUD	Cash Rate
	AUD	RBA Rate Statement
Wed, Aug 3	NZD	Employment Change q/q
	NZD	Unemployment Rate
	CHF	CPI m/m
	All	OPEC-JMMC Meetings
Thu, Aug 4	GBP	Construction PMI
	GBP	BOE Monetary Policy Report
	GBP	Monetary Policy Summary
	GBP	Official Bank Rate
Fri, Aug 5	AUD	RBA Monetary Policy Statement
	GBP	MPC Member Pill Speaks
	CAD	Employment Change

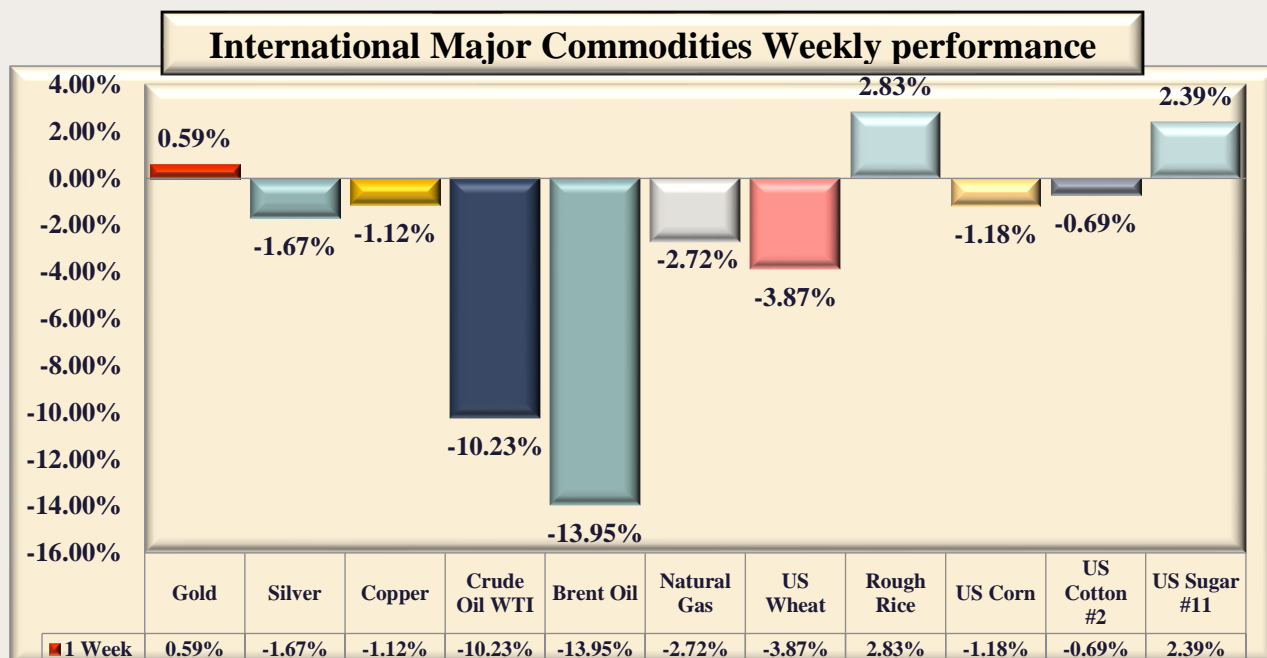


## World Major Indices Weekly Performance: % Change



## World International Markets Weekly Performance





- Gold Deteriorate in the second half of the day on Friday and decline toward \$1,770. After the US data showed Nonfarm Payrolls rose by 528,000 in July, the benchmark 10-year US Treasury bond yield gained more than 6%, weighing heavily on XAU/USD.
- WTI crude oil prices remain disconsolate at the lowest levels in six months as fears of economic slowdown supersede geopolitical crisis. That said, the black gold seesaws around \$87.20-30, after refreshing the multi-day low with the \$87.18 mark, as traders await the US employment data on Friday.

## Major News & Events Effect Major Commodities:

Date	Currency	News & Events
Mon, Aug 1	USD	ISM Manufacturing PMI
Tue, Aug 2	USD	JOLTS Job Openings
Wed, Aug 3	USD	FOMC Member Bullard Speaks
	All	OPEC-JMMC Meetings
	USD	ISM Services PMI
Thu, Aug 4	USD	Unemployment Claims
	USD	FOMC Member Mester Speaks
Fri, Aug 5	USD	Average Hourly Earnings m/m
	USD	Non-Farm Employment Change
	USD	Unemployment Rate

## **DISCLOSURES & DISCLAIMERS:**

Neither the information nor any opinion expressed here constitutes an offer or a solicitation of an offer to transact in any securities or other financial instrument and is for the personal information of the recipient containing general information only. This report is not intended to provide personal investment advice, nor does it provide individually tailored investment advice. This report does not consider the specific investment objectives, financial situation/financial circumstances, and the needs of any specific person. Investors should seek financial advice regarding the appropriateness of investing in financial instruments and implementing investment strategies discussed or recommended in this report and should understand that statements regarding prospects may not be realized.

This report has been prepared independently of any issuer of securities mentioned herein and not in connection with any proposed offering of securities or as an agent of any issuer of any securities.

We have taken all reasonable care to ensure that the information contained herein is accurate, up to date, and complies with all prevailing Pakistani legislations. However, no liability can be accepted for any errors or omissions, or any loss resulting from the use of the information provided as any data and research material provided ahead of an investment decision is for information purposes only. We shall not be liable for any errors in the provision of this information, or any actions taken in reliance thereon. We reserve the right to amend, alter, or withdraw any of the information contained in these pages at any time and without notice. No liability is accepted for such changes.