

From: **Asif Siddiq Kasbati** <asif.s.kasbati@professional-excellence.com>

Date: Thu, Aug 20, 2026 at 6:10 PM

Subject: PGEC245= MS increase Rs 2.97 & Diesel decrease Rs 32.63; Predictions & JI Dharna effects started

POL, Gas & Electricity Quick Commentary PGEC 245

I. Background: (a) PGEC 227 of Tuesday 14.7.26 about POL Shortage & **Expected price increase** and KC Recommendations **in trail, blue, italic and double Line** (b) Other relevant PGECs are in para IV, including PGEC 231, 227, etc whereby we predicted further increase.

II. Updated Commentary:

(A) Notification: Further to KQU 4048 of 20.8.26, we would inform your about [Prices of Petroleum Products Notification on 20th August, 2026](#) (**Attachment 245.1**).

Products	Prices wef 19.8.26 at 12:01am till 19.8.26 at 12am	Prices w.e.f. 20.8.26 at 12:01am	Increase / Decrease (Rs /liter)
High Speed Diesel (HSD)	395.69	363.06	(32.63)
Motor Spirit (MS) as KC predicted	334.54	337.51	2.97

(B) KC & Tola Predictions Went Wrong This Time

KC predictions have mostly worked well for several months; while Tola's recent predictions have also worked well.

KC was expecting a minor increase in POL Prices (inspite of covering Protests Dhana matter in KQUs and DNVCS); meanwhile, Tola Associates predicted Diesel price to be 399.95 (as compared to Rs 363.06) while MS price to be 336.83

(B) Decision made to reduce Diesel Price and JI Sit-in / Dharna

1. General: We would inform your about video [Decision made to reduce diesel price](#) (**Attachment 245.2**) and several Other matters covered in KQU and DNVC relating to JI Dharnas since 16 August 2026 and over Protest at 550 on Friday 7 August 2026.

2. Diesel Price Reduction: Good news for Pakistanis as a significant reduction in diesel prices is expected, potentially credited to the efforts of Jamaat-e-Islami. The party's protest is being reassessed, with increasing support questioning whether those who previously blamed them for price hikes will acknowledge their role in this upcoming decrease. Meanwhile, activities including **Quranic lessons** continue at the 3 Governors' Houses and Punjab Chief Minister house highlighting the party's ongoing engagement with the community.

3. Jamaat-e-Islami's Role: The recent rise in fuel prices, including petrol and diesel, has led to criticism directed at Jamaat-e-Islami. However, as the possibility of price reductions arises, it remains to be seen if critics will acknowledge Jamaat-e-Islami's role in this potential change. Meanwhile, Jamaat-e-Islami continues its activities at the Governor House and maintains its outreach efforts, including Quran lessons and youth programs.

4. Credit for Price Change: Fuel prices have risen, and diesel has become more expensive, yet there are calls to credit Jamaat-e-Islami for any potential decrease in prices. Currently, Jamaat-e-Islami is actively engaged in community activities, and an announcement regarding a significant drop in diesel prices is expected soon, which may also be attributed to their efforts.

III. List of relevant TLQCs

(a) PGEC 244 of 19.8.26 about MS increase Rs 3.34 & Diesel increase Rs 5.27, as we predicted and KC Recommendations

(b) PGEC 243 of 18.8.26 about MS increase Rs 5.77 & Diesel increase Rs 6.47, as we predicted and KC Recommendations

(c) PGEC 242 of 13.8.26 about MS decrease Rs 1.70 & Diesel increase Rs 1.39

(d) PGEC 241 of 7.8.26 about POL Prices minor decrease from 7.8.26 and KC View & Recommendation

(e) PGEC 240 of 6.8.26 about Petrol / MS Price increase as KC predicted; Diesel minor decrease from 6.8.26 and KC View & Recommendation

(f) PGEC 239 of 5.8.26 about POL Prices decrease from 5.8.26 and KC View & Recommendation

(g) PGEC 238 of 4.8.26 about POL Prices decrease from 4.8.26 and KC View & Recommendation

(h) PGEC 237 of 31.7.26 about POL Prices increase from 31.7.26 as KC Predicted and KC View & Recommendation

(i) PGEC 236 of 30.7.26 about POL Prices increase from 30.7.26 as KC Predicted and KC View & Recommendation

(j) PGEC 235 of 29.7.26 about POL Prices increase from 29.7.26 as KC Predicted and KC View & Recommendation

(k) PGEC 234 of 28.7.26 about POL Prices increase from 28.7.26 as KC Predicted and KC View & Recommendation

(l) PGEC 233 of 25.7.26 about POL Prices increase from 25.7.26 as KC Predicted and KC View & Recommendation

(m) PGEC 232 of 24.7.26 about POL Prices increase from 24.7.26 as KC Predicted and KC View & Recommendation

(n) PGEC 231 of 23.7.26 about POL Prices increase from 23.7.26 and KC View & Recommendation

(o) PGEC 230 of 22.7.26 about MS increase Rs 4.93 & Diesel increase Rs 7.15

(p) PGEC 229 of 21.7.26 about MS decrease Rs 0.35 & Diesel increase Rs 5.71

(q) PGEC 228 of 19.7.26 about MS & Diesel price increased, as KC predicted. Have Your Entity taken Millions benefit??

VI. Further Details & Services: Should you require any clarification or explanations in respect of the above or otherwise, please feel free to email Mr Amsal at amsal@kasbati.co with CC to info.kasbati@professional-excellence.com.

Best regards for Here & Hereafter
Asif S Kasbati (FCA, FCMA & LLB)

Managing Partner

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From: Asif Siddiq Kasbati <asif.s.kasbati@professional-excellence.com>

Date: Tue, Jul 14, 2026 at 7:20 PM

Subject: PGEC227: POL Shortage & Expected price increase and KC Recommendations

I. Background: This refers to PGEC224 about MS & Diesel price increase, as KC predicted. Have Your Entity taken benefit?? (b) PGEC 226 about HSD, MS, & HOBC price history

II. Shortage: *As per a reliable source, there is shortage of Petrol & Diesel as evident from certain pumps in a far flung areas, which became dry (and may likely the same position in cities shortly). Moreover, most Distribution companies are either not providing POL or providing less than 50% of the pumps' requirement; likely owing to matter in para III or overall shortage in upcoming supply to Pakistan and International prices increase.*

III. POL Prices Expected increase: *Effective from 12:01am on 18.7.26, we also expect the increase in POL Prices in Pakistan owing to international, unless Government reduces Petroleum Development Levy (PDL) to counter the increase.*

IV. Kasbati & Co Recommendations: *Keeping in view para II & III, to minimise POL expenses, arrange to fill all the vehicles ASAP today and ensure POL therein in till atleast Saturday 18.7.27 evening. We expect likely rush at Petrol Pump from today or tomorrow evening*

*Best regards for Here & Hereafter
Asif S Kasbati (FCA, FCMA & LLB)*