

From: **Asif Siddiq Kasbati** <asif.s.kasbati@professional-excellence.com>
Date: Fri, Oct 9, 2026 at 6:39 PM
Subject: PGEC283= Diesel at 395.72 & MS at 398.96 and KC Views & Recommendations

POL, Gas & Electricity Quick Commentary - PGEC 283

I. Background: (A) Relevant PGECs are in para IV, including PGEC 231, 227, etc whereby we predicted major increase and then minor increase / decrease vide (B) PGEC 282 in trail, with certain exceptions as to major increase / decrease

II. Updated Commentary

Notifications: Further to KQU 4123 of 9.10.26, being an important matter, we inform you about the [Prices of Petroleum Products on 9.10.26](#) (Attachment 283.1)

Products	Prices w.e.f. 8.10.26 at 12:01am to 9.10.26 at 12am	Prices w.e.f. 9.10.26 at 12:01am & onwards	Increase / (Decrease)
High Speed Diesel (HSD)	394.94	395.72	(0.78)
Motor Spirit (MS)	396.65	398.96	2.31

III. Saving of Millions: We hope that your entity would have saved millions by following our recommendation as per PGEC 231, 227, 243, etc ignoring minor changes (including US War on Iran into Gulf was indicated earlier).

IV. Kasbati & Co Views & Recommendations

A. In our view, POL prices are likely to decrease owing to about 1% decrease in international crude oil prices at the time of first release of this QC, however, this may increase sharply in case of re-start of Gulf issue to some extent (like 2-3 weeks days ago to some extent) OR sharply reduce due to matters in para IVB and V.

B Having stated above in Para IV A, based on the matters stated in para V, we predict significant reduction POL prices in the 2nd or 3rd week of October, due to PDL

deferral for One year as per Govt Offer to JI as against stoppage of Super March to Islamabad and PM had agreed Mr Hafiz Naeem after returning from US and after returning has directed 5 Ministries (may be SBP too) to come up with JI Recommendations and Actions Plan to cover PDL Revenue loss coverage; and expected meeting 2-3 days, ISA. Hence, fill all the entity's vehicle tanks for **about 3-4 days**. We will keep our Subscribers posted like the matters in Para V.

V. JI & related matters

If PDL is abolished thanksgiving program in Islamabad, else be ready for Long March restart towards Islamabad – Hafiz Naeem 7.10.26

Federal Planning Minister Ahsan Iqbal (who heads the government committee on the PDL abolition, connected IPPs & 5 Ministries issues plus SPB policy rate reduction to cover revenue loss) contacted JI Vice Emir Liaquat Baloch on 6.10.26 and conveyed the PM's message regarding the proposed talks. Mr Baloch has confirmed above and coordinate with the JI committee and finalise a mutually-agreed schedule for a meeting between PM and the JI Emir Hafiz Naeem ur Rahman Sb – Dawn of 7.10.26.

Minor Price relief is not the permanent solution. Only PDL abolition, with other Govt exp saving suggested, avoid corruption plus 4 matters etc, are the permanent solution. If PM does abolish PDL his promise by 7.10.26 - JI will announce way forward on 7.10.26

PTI, JUI & PPP did not objected to PML N PDL levy, when proposed & approved in the Parliament (National Assembly & Senate) and signed by PPP President

VI. List of relevant QCs and Important are marked in bold

1. PGEC 279 of 1.10.26 about Diesel down by Rs 1.89 & MS down by Rs 0.14 and KC Views & Recommendations
2. PGEC 279 of 1.10.26 about Diesel down by Rs 1.89 & MS down by Rs 0.14 and KC Views & Recommendations
3. PGEC 278 of 30.9.26 about Diesel down by Rs 2.5673 & MS down by Rs 1.49 and KC Views & Recommendations
4. PGEC 277 of 29.9.26 about Diesel down by Rs 3.56 & MS down by Rs 2.27 and KC Views & Recommendations
5. PGEC 276 of 27.9.26 about Diesel down by Rs 3.59 & MS Increase by Rs 2.02 and KC Views & Recommendations

6. PGEC 275 of 25.9.26 about Diesel minor down by Rs 2.63 & MS by Rs 0.84 and KC Views & Recommendations
7. PGEC 274 of 24.9.26 about Diesel minor down by Rs 4.21 & MS by Rs 1.93 and KC Views & Recommendations
8. PGEC 273 of 23.9.26 about PSO HOBC at Rs 400 and MS at 392.05 and KC Recommendations & Actions
9. PGEC 272 of 22.9.26 about Diesel minor down by Rs 3.12 & MS by Rs 1.70; KC Views as to Major POL Prices Reduction, ISA; Temporary JI stay at Multan, as PM to assure about PDL deferral for 1 Year; Keep 10 days POL filled due to PTI protests
10. PGEC 271 of 22.9.26 about Diesel minor down by Rs 1.96 & MS up by Rs 4.61; KC Views as to Major POL Prices Reduction, ISA; High Alert as Masses & Media supporting Jamaat e Islami stance; Temporary JI stay at Multan, as Govt Offered PDL deferral for 1 Year
11. PGEC 270 of 19.9.26 about Diesel minor down by Rs 0.88 & MS by Rs 1.65; KC Recommendations; JI Shura meeting view (not one man show); Beautiful Hafiz story; JI Grand Marches towards Islamabad on 20.9.29;
12. PGEC 269 of 19.9.26 about Diesel up Rs 3.47 & MS down Rs 0.43; KC Recommendations; PDL how approved by Parliament; its History; Techocrat for PDL removal; JI-Govt Talk details & Islamabad Protest plans for 20.9.26
13. PGEC 268 of 17.9.26 about Diesel up Rs 5.62 & MS by Rs 6.88, as KC predicted; KC Recommendations; Govt Austerity required; Peanut Relief; JI-Govt Talk details & Islamabad strategy on 17.9.26
14. PGEC 267 of 16.9.26 about Diesel price increase by Rs 6.41 & MS by Rs 4.10, as KC predicted; KC Recommendations; Govt Austerity required; Petrol Pumps rejected Relief Scheme; JI-Govt Talk status & Islamabad strategy on 17.9.26
15. PGEC 266 of 15.9.26 about Diesel price increase by Rs 6.10 & MS by Rs 4.42; KC Recommendations; Rs 75T Petrol Relief from Rs 1,500T PDL is Joke; hence, JI-Public Sit-in @40 places continue & Islamabad plan continue for 20.9.26
16. PGEC 265 of 14.9.26 about Diesel price increased by Rs 5.28 & MS by Rs 5.02; JI Sit-Ins @35 places; JI-Establishment FAQ, Islamabad protest on 20.9.26
17. PGEC 264 of 11.9.26 about Diesel price increase by Rs 5.37 & MS by Rs 3.05; JI-Govt 10.9.26 meeting details; Independent experts supporting JI stance and KC Recommendations
18. PGEC 261 of 10.9.26 Increase in Diesel price by Rs 6.72 & MS by Rs 3.40 by Govt & not J I and KC Recommendations
19. PGEC 260 of 10.9.26 about Increase in Diesel price by Rs 4.18 & MS by Rs 5.58, as predicted and KC Recommendations

20. TLQC 3718 of 9.9.26 about Jamaat e Islami & Govt 7.9.26 meeting to decrease High Taxes including PDL, Electricity, Govt expenses, etc
21. TLQC3708= Jamaat-e-Islami & Govt 3.9.26 Meeting details - High Taxes & Levies including PDL & POL Prices, IPPs Capacity payment, Inflation, etc
22. PGEC 259 of 8.9.26 about Increase in Diesel price by Rs 3.72 & MS by Rs 12.90, as predicted, Millions Savings, Ji-Govt meeting details
23. PGEC 257 of 4.9.26 about Increase of Rs 2.28 in Diesel & MS Rs 2.84 Prices, as predicted & Ji-Govt meeting expected good results
24. **PGEC 256 of 3.9.26 about Diesel increase Rs 1.11 & MS increase Rs 2.29, as Predicted; will share good news tomorrow as to Ji-Govt meeting**
25. **PGEC 254 of 2.9.26 about Diesel increase Rs 0.51 & MS increase Rs 1.08, as Predicted; Govt contacted Ji but protest on 3.9.26, as no PDL withdrawal**
26. **PGEC 251 of 29.8.26 about minor decreases in MS and Diesel prices of Rs. 0.58 and Rs. 0.17, respectively, with predictions and nationwide protests on 3.9.26.**
27. **PGEC 245 of 20.8.26 about MS increase of Rs. 2.97 and Diesel decrease of Rs. 32.63, with predictions and Ji Dharna effects having started.**
28. PGEC 244 of 19.8.26 about MS increase of Rs. 3.34 and Diesel increase of Rs. 5.27, as predicted, along with KC recommendations.
29. **PGEC 243 of 18.8.26 about MS increase of Rs. 5.77 and Diesel increase of Rs. 6.47, as predicted, along with KC recommendations.**
30. **PGEC 237 of 31.7.26 about POL price increases from 31.7.26, as predicted by KC, along with KC views and recommendations.**
31. **PGEC 231 of 23.7.26 about POL price increases from 23.7.26, along with KC views and recommendations.**
32. PGEC 230 of 22.7.26 about MS increase of Rs. 4.93 and Diesel increase of Rs. 7.15.
33. PGEC 229 of 21.7.26 about MS decrease of Rs. 0.35 and Diesel increase of Rs. 5.71.
34. PGEC 228 of 19.7.26 about increases in MS and Diesel prices, as predicted by KC. Have your entities taken millions in benefits?

VII. Multiplication

If Public support continues with Dharna on Physically OR atleast Social Media and Regular support Invitation to your friends & relatives to be a part of this great struggle based on regular increase in [Jamaat e Islami membership form filling](#), several issues are settled.

Although all the Commentaries are to the extent of the Subscribed IDs only, however, your Goodself is allowed to share this PGEC for the Noble Cause to Impart Knowledge, so as to save POL Prices can be reduced quickly as everyone is facing issues

Otherwise, be ready for constant increases in POL & Electricity Bills with different methods

VIII. 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

Kasbati & Co (1400+ Tax, Levies, Companies, Economy, Inflation, HR, Banking, Finance, etc
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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)

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

Date: Thu, Sep 10, 2026 at 6:33 PM

Subject: PGEC261= Increase in Diesel price by Rs 6.72 & MS by Rs 3.40 by Govt & not J I and KC Recommendations

I. Background: (a) TLQC 3708 of 4.9.26 about Jamaat-e-Islami & Govt 3.9.26 Meeting details - High Taxes & Levies including PDL & POL Prices, IPPs Capacity payment, Inflation, etc (b) PGEC 227 of Tuesday 14.7.26 about POL Shortage & **Expected price increase** and KC Recommendations **in trail, blue, italic and double Line** (c) 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 4079 of 10.9.26, we inform you about the Prices of Petroleum Products on 10th September, 2026 (Attachment 261.1).

Products	Prices wef 9.9.26 at 12:01am till 9.9.26 at 12am	Prices w.e.f. 10.9.26 at 12:01am	Increase (Rs /liter)
High Speed Diesel (HSD)	385.95	392.67	6.72
Motor Spirit (MS) as KC predicted	364.35	367.75	3.40

III. Saving of Millions: We hope that your entity would have saved millions by following our recommendation as per PGEC 231, 227, 243, etc (including US War on Iran into Gulf was indicated earlier).

IV. Kasbati & Co Recommendations: In our view, POL prices are likely to increase owing to minor increase in international crude oil prices, however, this may increase sharply in case of re-start of Gulf issue (like recently to some extent). Hence, to save millions compared to competitors, we reiterate our recommendation to fill all the entity's vehicle tanks (to the possible extent)

ASAP, given several PGECs covering increases, ignoring a few PGECs covering minor reductions. However, please see para V & VII.

V. Jamaat-e-Islami Sir-in / Dharna, PDL Reduction or Waiver and JI- Govt meeting on 6 Major matters

Family Governments & Public Guard (Choor or Chokidar)! Whom would your Goodself support for a better economy and PDL issue?

Owing to the matters stated in PGEC 256 and in trail TLQC 3708, there are likely to be reduction in POL prices anytime. Interesting Press Conference in Islamabad with details about Post Jamaat e Islami Technical Team meeting with Govt Committee on Monday 7.9.26 First Meeting. JI gave 6 major suggestions for 5 Ministries plus SBP, which are sent by Govt to relevant officials. Next meeting planned for Thursday 10.9.25. JI Technical Committee is available for support regarding the explanation and guidance for the six major suggestions.

PDL is rigorous Tax & be waived with justifications - High Level Expert of JI Technical Committee part Mr Nadeem Ali Baig Sb, CEO Alkhidmat

POL prices & Income of Public in Pakistan VS US. Top level Chambers Leader, Businessmen & Industrialist Mr Zubair Motiwala Sb also agreed to Jamaat e Islami Slogan to eliminate PDL

How would it feel if an IPP received billions of rupees in capacity charges while remaining shut down? Would this be fair to the public, whose hard-earned money is being swindled by someone else?

VI. List of relevant QCs and Important are marked in bold

(a) to (o) covered in latest

VII. Multiplication

covered in latest

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