



MARKET SUMMARY		
NEPSE	1,175.05	-0.49%
Total Turnover (Rs.)	372,915,706	1.80%
Share Volume	1,163,781	-16.31%
Total Transactions	4,976	28.51%
Total Market Cap. (Rs. Mill)	1,406,068.36	-0.49%
Floated Market Cap (Rs. Mill)	487,531.79	-0.60%

MARKET CAP TO GDP RATIO	46.75%	▲
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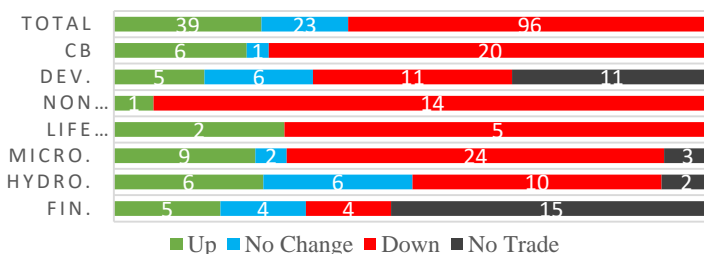
WEIGHTAGE ON MARKET CAP	
Commercial Banks	52.77%
Development Bank	5.20%
Finance	3.22%
Microfinance	6.19%
Life Insurance	8.34%
Non-life Insurance	6.73%
Hydropower	4.04%
Hotel	1.62%
Manufacturing And Processing	2.83%
Trading	0.10%
Others	8.97%
NTC	7.80%

Top Gainers	WOMI, CIT, CFCL
Top Losers	BHBL, SDESI, AMFI
Top Stocks by Shares Traded	NBL, NICA, BOKL
Top Stocks by Transactions	UPPER, NBL, BOKL
Top Stocks by Turnover	NBL, NICA, BOKL
Top Brokers by Turnover	58, 16, 49

NEPSE STATISTICS	
Average Return	17.13%
Standard Deviation	17.41%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.37

Notes: NEPSE Index from 2069.04.01 –2075.09.29. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.13% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

TRADED SCRIPTS STATS



MARKET OVERVIEW

NEPSE fell 5.78 points on the opening day of the week, closing at 1175.05. While there was a 4,976 transactions from the trading of 158 scripts, the number of share traded on the day fell by 16%, though Turnover saw minor increment. Sensitive, Float and Sensitive Float index decreased by 1.23, 0.52 and 0.47 points respectively.

Except Manu.& Pro. and Others sub-indices, rest indices fell at the end of the day. Major losers were Non-life insurance (71.27 points), Hotels (12.87 points) and Microfinance (12.7 points). Banking lost 6.32 points while Life insurance lost 11.18 points.

BHBL, AKJCL and SDESI underperformed the most as compared to its sector performance while CIT, CFCL performed relatively well. GUFL, WOMI and SDESI were the most volatile stocks. PMHPL, GRDBL, BARUN are trading closer to 52 weeks low while JEFL, CIT and SAEF are trading near to 52 weeks high. NICL, UMB have falling investors participation and EBL, NICA have rising investors participation.

MAJOR MARKET NEWS

- ☑ Ticker of Upper Tamakoshi Hydropower Co. is UPPER; Open range Rs.74.89 to Rs.224.67; huge buyers for the shares at upper range but no sellers.
- ☑ NIB 32nd AGM endorsed 18% bonus and 22% cash dividend; Bank earned Rs.3.65 billion net profit in the FY 2074/75.
- ☑ JBNL 9th AGM endorsed 8.5% cash dividend; Bank earned Rs.1.003 billion net profit in the FY 2074/75.
- ☑ GBIME 12th AGM endorsed 16% bonus; Bank earned Rs.2.10 billion net profit in the FY 2074/75.
- ☑ RSDC 5th AGM endorsed 10% bonus;
- ☑ Only 4.5% of 21,00,350 units Local IPO issue of Universal Power Company Ltd. subscribed; issue period extended till Magh 06, 2075.
- ☑ SRBL inaugurated its 6 provincial offices; provincial head offices at Itahari for Province 1, in Lahaan for Province 2, in Pokhara for Province 4, in Butwal for Province 5, in Surkhet for Karnali Province and in Attariya for province 7.
- ☑ NIC Asia Bank latest branch in Nalgat Nagarpalika -7, Dallibazar of Jajarkot distrit is in operation.
- ☑ Ghalemdi Hydro Limited 1,533,770 units IPO sets to be allocated on Tuesday



MAJOR EVENTS (Today)

- 📌 Panchthar Power Company Ltd. 9,62,500 units IPO to the local of Panchthar District's.
- 📌 NTC 11th AGM
- 📌 SBI 25th AGM
- 📌 HBL 26th AGM
- 📌 CZBIL 12th AGM
- 📌 MEGA 8th AGM
- 📌 NCDB 9th AGM
- 📌 NNLB 10th AGM
- 📌 SADBL 14th AGM
- 📌 DHPL 4th/5th/6th AGM
- 📌 AKPL 7th/8th AGM
- 📌 HIDCL 7th AGM
- 📌 Book closure date for 24th AGM of BOKL

GLOBAL INDICES		
SENSEX	36,009.84	-96.66
NIFTY	10,794.95	-26.65
S&P 500	2,596.26	-0.38
DJIA	23,995.95	-5.97
NIKKEI 225	20,359.70	+195.90

COMMERCIAL BANKS SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	218.00
	Nepal Bank Ltd.	NBL	300.00
	Janata Bank Nepal Ltd.	JBNL	168.00
	Mega Bank Nepal Ltd.	MEGA	173.00
	Nepal Bangladesh Bank Limited	NBB	191.00
FAIRLY PRICED	Civil Bank Ltd	CBL	162.00
	NMB Bank Limited	NMB	326.00
	Nepal Investment Bank Limited	NIB	546.00
	NIC Asia Bank Ltd.	NICA	384.00
	Sanima Bank Limited	SANIMA	306.00
OVER PRICED	Standard Chartered Bank Limited	SCB	589.00
	Nabil Bank Limited	NABIL	838.00
	Bank of Kathmandu Ltd.	BOK	329.00
	Everest Bank Limited	EBL	531.00
	Prime Commercial Bank Ltd.	PCBL	330.00

Notes: # Above pricing is performed by averaging the prices derived as per P/E, P/B and 180 days closing averages.
Harmonic Mean of industries is carried for Pricings.

NEPSE TECHNICAL OUTLOOKS



Date / Time	29.09.2075
Close	1,175.05
Open	1,181.13
High	1,182.44
Low	1,173.33
Turnover	372,915,706
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1,213.07
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1,184.23
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1,155.39
RSI (14)	48
MA (20, Volume, ma, 0)	434m
MACD (12,26,9)	1
Signal macd (12,26,9)	2
macd (12,26,9)_hist	-1

Indicators used: Bollinger Bands, MACD, RSI, Moving Average (20 days) Volume



Disclaimers: This MARKET SUMM is prepared to timely update the market participants about the Nepalese stock market before the Market opens for the day. The information and data herein should not be construed as an investment advice or recommendation. Should the investors choose to act based on this report, it shall be entirely at their own risk and KCL Astute shall not be liable, for any loss or damages incurred thereby. Unless otherwise specifically stated, the above data concerns the previous trading day.

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