



MARKET SUMMARY		
NEPSE	1,187.97	-0.63%
Total Turnover (Rs.)	530,651,437	33.55%
Share Volume	1,744,187	108.82%
Total Transactions	5,241	13.07%
Total Market Cap. (Rs. Mill)	1,450,529.23	-0.52%
Floated Market Cap (Rs. Mill)	506,427.67	-0.35%

MARKET CAP TO GDP RATIO 48.23% ▲

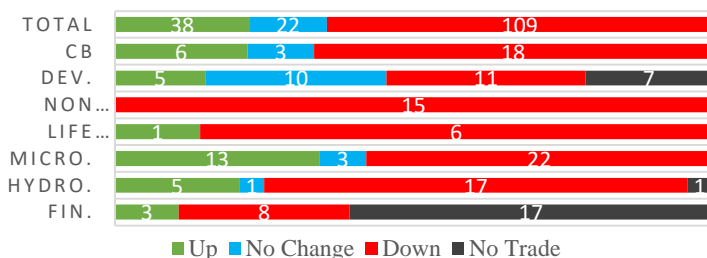
WEIGHTAGE ON MARKET CAP	
Commercial Banks	51.14%
Development Bank	5.11%
Finance	3.47%
Microfinance	6.21%
Life Insurance	8.26%
Non-life Insurance	6.69%
Hydropower	6.02%
Hotel	1.59%
Manufacturing And Processing	2.75%
Trading	0.10%
Others	8.65%
NTC	7.51%

Top Gainers	UPPER, NHDL, MSLB
Top Losers	NMBMF, MIDBL, BPCL
Top Stocks by Shares Traded	NBL, MBLPO, MBL
Top Stocks by Transactions	NBL, CIT, NICA
Top Stocks by Turnover	NBL, CIT, MBLPO
Top Brokers by Turnover	17, 34, 25

NEPSE STATISTICS	
Average Return	17.26%
Standard Deviation	17.40%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.37

Notes: NEPSE Index from 2069.04.01 –2075.10.02. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.26% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

TRADED SCRIPTS STATS



MARKET OVERVIEW

NEPSE fell by 7.57 points on Wednesday to close at 1,187.97. However, both the total transactions and share volume increased at the end of trading day. Turnover was also Rs.53.06 crores, showing increasing market participants lately. Sensitive, Float and Sensitive Float index increased 2.05, 0.39 and 0.56 points respectively.

Three sub-indices – Hydropower, Manu. & Pro. and Trading posted gain of 22.83, 2.89 and 1.86 points respectively. Rest other sub-indices posted loss on the day. Major losing sectors were Non-life insurance (112.18 points), Life insurance (73.04 points) and Microfinance (15.68 points). Banking fell by 5.2 points.

NMBMF, BPCL, and MIDBL underperformed the most as compared to its sector performance while UPPER, MSLB, NHDL performed relatively well. MBL, SADBL, SMATA were the most volatile stocks. MIDBL, RRHP, NABIL are trading closer to 52 weeks low while CIT, JEFL, MBLPO are trading near to 52 weeks high. SMATA, CLBSL, NNLB are on consecutive rise for days while KEBL, BOKL are on consecutive fall.

UPPER and NHDL gained most on the day.

MAJOR MARKET NEWS

- NICA Q2 Report – Net profit rose by 164.34% to Rs.1.51 billion when compared with corresponding previous quarter; Free profit after reg. adjustment Rs.1.26 billion; EPS Rs.34.31, BVPS Rs.149.93.
- Cut-off price of CCBL Auction – 409,175 units Ordinary Shares Rs.165; 1,461,099 units Promoter shares Rs.105.
- UPPER has requested all the shareholders of the first phase of the issue - *EPF, employees of the promoter company, and employees of NEA* to dematerialize their respective shares for trade in secondary market.
- CEFL Q2 Report – Net profit plunged by 71.68% to Rs.80.10 lakhs when compared with corresponding previous quarter; EPS fell to Rs.4.95; BVPS Rs.41.57.
- NMBMF Q2 Report – Net profit plunged by 43.18% to Rs.1.03 crores; EPS fell to Rs.12.74; BVPS Rs.159.88.



- MoU signed between GBIME and Educational Consultancy Association Nepal (ECAN) whereby the Bank shall provide foreign education loan to needy students within 3 working days of loan application.
- RBB added latest branches at Dhangadi -7, Campuschowk of Kailali district and in Pokhara-6, Barahi of Kaski.

MAJOR EVENTS (Today)

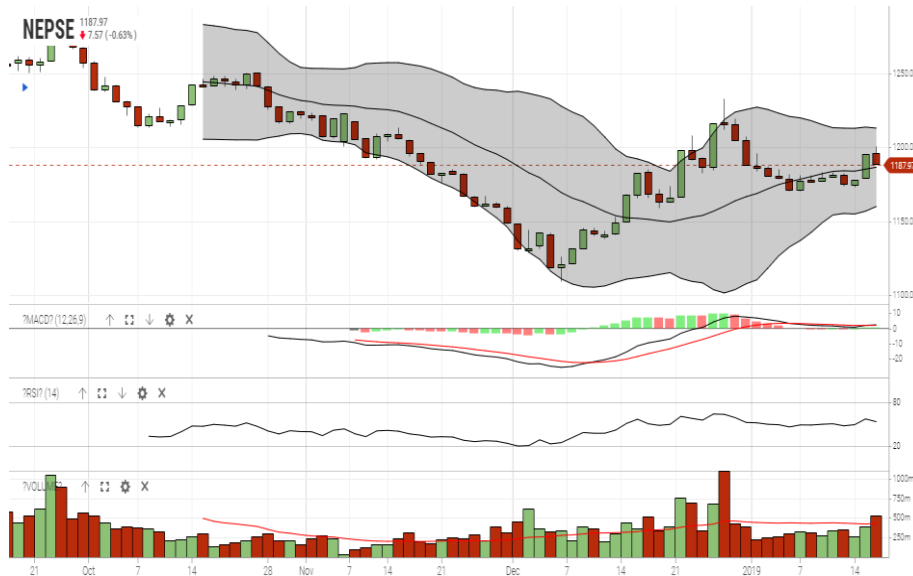
- Panchthar Power Company Ltd. 9,62,500 units IPO to the local of Panchthar District.
- Book closure date for 17th AGM of SKBBL; Agenda: 25% Bonus shares

GLOBAL INDICES		
SENSEX	36,321.29	+2.96
NIFTY	10,890.30	+3.50
S&P 500	2,617.28	+6.98
DJIA	24,173.76	+108.17
NIKKEI 225	20,442.75	-112.54

COMMERCIAL BANKS SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	216.00
	Nepal Bank Ltd.	NBL	291.00
	Mega Bank Nepal Ltd.	MEGA	172.00
	Bank of Kathmandu Ltd.	BOKL	265.00
	Janata Bank Nepal Ltd.	JBNL	170.00
FAIRLY PRICED	Civil Bank Ltd	CBL	161.00
	NMB Bank Limited	NMB	323.00
	Nepal Investment Bank Limited	NIB	544.00
	Siddhartha Bank Limited	SBL	293.00
	Century Commercial Bank Ltd.	CCBL	172.00
OVER PRICED	Standard Chartered Bank Limited	SCB	594.00
	Nabil Bank Limited	NABIL	845.00
	Everest Bank Limited	EBL	533.00
	Himalayan Bank Limited	HBL	461.00
	Prime Commercial Bank Ltd.	PCBL	327.00

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	02.10.2075
Close	1,187.97
Open	1,196.05
High	1,200.32
Low	1,187.97
Turnover	530,651,435
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1,213.09
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1,186.62
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1,160.16
RSI (14)	54
MA (20, Volume, ma, 0)	431m
MACD (12,26,9)	2
Signal macd (12,26,9)	2
macd (12,26,9)_hist	0

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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Today's Outlook