



## MARKET OVERVIEW

MARKET SUMMARY		
NEPSE	1,168.63	0.05%
Total Turnover (Rs.)	292,214,345	-20.53%
Share Volume	1,024,615	-19.05%
Total Transactions	7,488	-37.47%
Total Market Cap. (Rs. Mill)	1,425,998.76	0.07%
Floated Market Cap (Rs. Mill)	497,864.67	0.13%

MARKET CAP TO GDP RATIO 47.41% ▲

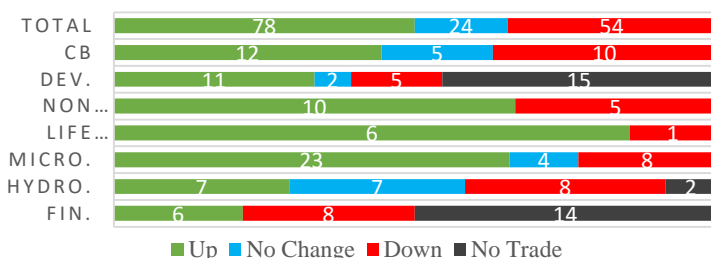
WEIGHTAGE ON MARKET CAP	
Commercial Banks	51.34%
Development Bank	5.13%
Finance	3.33%
Microfinance	6.27%
Life Insurance	8.28%
Non-life Insurance	6.64%
Hydropower	5.85%
Hotel	1.61%
Manufacturing And Processing	2.64%
Trading	0.10%
Others	8.80%
NTC	7.68%

Top Gainers	SMATA, LICN, NBBL
Top Losers	KADBL, NHDL, UNL
Top Stocks by Shares Traded	UPPER, MBL, PRVU
Top Stocks by Transactions	UPPER, PIC, PMHPL
Top Stocks by Turnover	UPPER, MBL, CIT
Top Brokers by Turnover	34, 49, 44

NEPSE STATISTICS	
Average Return	16.97%
Standard Deviation	17.39%
Standard Error	1.15%
Skewness	0.45
Kurtosis	3.38

Notes: NEPSE Index from 2069.04.01 –2075.10.08. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 16.97% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

### TRADED SCRIPTS STATS



NEPSE posted a negligible gain of 0.78 points on Tuesday, closing at 1,168.83. Throughout the day, NEPSE hovered between 1,162.74 and 1,172.50. There was a significant fall on Turnover along with the massive drop in shares traded from 7,488 transactions of only 156 scripts. However, Sensitive, Float and Sensitive Float index increased 0.43, 0.11 and 0.1 points respectively.

Three sub-indices – Manu. & Pro, Hydropower and Finance registered loss of 92.29, 5.14 and 1.75 points respectively on the day. Rest all sub-indices closed green. Major gainers were Life insurance (67.68 points), Microfinance (17.6 points) and Hotels (15 points). Both Banking and Non-life Insurance showed meagre rise of 0.43 and 0.19 points respectively.

KADBL, NHDL underperformed the most as compared to its sector performance while CLBSL, PMHPL and NHPC performed relatively well. UPPER, KADBL and NHDL were the most volatile stocks. GRDBL and RRHP traded at all-time low today. UNL, UMHL and HBL are trading closer to 52 weeks low while JEFL, NTC are trading near to 52 weeks high.

KADBL and NHDL hit negative circuit losing 9.82% and 9.65% respectively.

*Investors' Pressure Group brought forward 32 new demands, giving a 9 days ultimatum to be fulfilled i.e. till 15<sup>th</sup> Magh. Some of the demand includes:*

- Brokers to initiate margin trading by 10<sup>th</sup> Magh.
- Annul the practice of charging 5% DDT to shareholders on return received after 30% TDS already paid by Company.
- Listed companies failing to hold AGM within 6 months of end of FY and Insurance companies failing to meet the capital requirement duly, to be taken into forced M&A.
- BFI's issuing debenture to set coupon rate at least 1% below the maximum interest rates on deposits and such company not to provide any cash dividends.
- Lock in period of 3 years to be set on IPO shares allotted to Mutual funds or else the reserves of IPO shares to MFs to be removed.
- Cash and Bonus shares to be distributed to shareholders account within 7 and 15 days of AGM respectively.
- Companies to distribute cash dividend as well for tax purpose while issuing bonus shares.



## MAJOR MARKET NEWS

- ☑ KBL Q2 Report – Net profit rose to Rs.67.62 crores; EPS Rs. 18.62 BVPS Rs.159.90.
- ☑ UFL Q2 Report – Net profit rose to Rs.3.33 crores; EPS Rs. 8.33 BVPS Rs.127.09.
- ☑ NRB requires the Companies offering hire purchase loan to increase the paid up capital to Rs.20 Crore by end of Ashadh, 2077 and to Rs.30 Crore by end of Ashadh, 2078.
- ☑ SEBON to offer the choice to Locals of project affected areas to apply IPO through ASBA. Also they are waived from annual renewal fee of Demat accounts until the lock in period for trading of such shares is over.

## MAJOR EVENTS (Today) - None

GLOBAL INDICES		
SENSEX	36,444.64	-134.32
NIFTY	10,922.75	-39.10
S&P 500	2,652.24	-18.47
DJIA	24,550.19	-156.16
NIKKEI 225	20,662.91	-96.42

COMMERCIAL BANKS SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	216.00
	Nepal Bank Ltd.	NBL	291.00
	Bank of Kathmandu Ltd.	BOKL	256.00
	Mega Bank Nepal Ltd.	MEGA	168.00
	Janata Bank Nepal Ltd.	JBNL	167.00
FAIRLY PRICED	Civil Bank Ltd	CBL	160.00
	Machhapuchhre Bank Limited	MBL	210.00
	Nepal Investment Bank Limited	NIB	537.00
	Laxmi Bank Limited	LBL	219.00
	Sanima Bank Limited	SANIMA	302.00
OVER PRICED	Nabil Bank Limited	NABIL	842.00
	Standard Chartered Bank Limited	SCB	575.00
	Everest Bank Limited	EBL	530.00
	Nepal SBI Bank Limited	SBI	400.00
	Prime Commercial Bank Ltd.	PCBL	324.00

*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	08.10.2075
Close	1,168.83
Open	1,167.62
High	1,172.50
Low	1,162.74
Turnover	292,214,345
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1,211.41
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1,184.72
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1,158.03
RSI (14)	44
MA (20, Volume, ma, 0)	383m
MACD (12,26,9)	-0
Signal macd (12,26,9)	2
macd (12,26,9)_hist	-2

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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