



MARKET SUMMARY		
NEPSE	1191.74	-0.54%
Total Turnover (Rs.)	798,718,053	-9.45%
Share Volume	2,276,175	-19.63%
Total Transactions	7,993	-8.68%
Total Market Cap. (Rs. Mill)	1,429,526.12	-0.18%
Floated Market Cap (Rs. Mill)	496,277.82	-0.24%

MARKET CAP TO GDP RATIO	47.28%	▼
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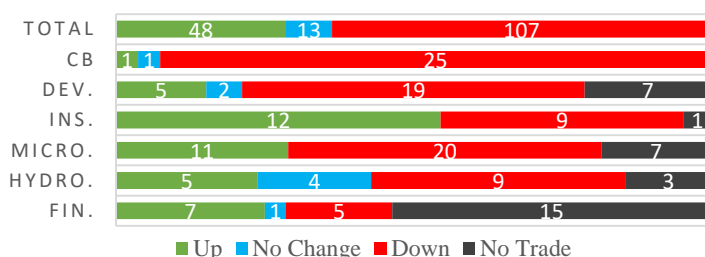
WEIGHTAGE ON MARKET CAP	
Commercial Banks	53.66%
Development Bank	5.24%
Finance	2.67%
Microfinance	6.07%
Insurance	14.40%
Hydropower	3.97%
Hotel	1.62%
Manufacturing And Processing	2.79%
Trading	0.09%
Others	9.51%
NTC	8.33%

Top Gainers	HATH, GILB, CLBSL
Top Losers	BBC, MPFL, GBBL
Top Stocks by Shares Traded	PCBLP, NMB, NBL
Top Stocks by Transactions	NMB, NIB, NLIC
Top Stocks by Turnover	NMB, PCBLP, NIB
Top Brokers by Turnover	34, 44, 39

NEPSE STATISTICS	
Average Return	17.51%
Standard Deviation	17.44%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.36

Notes: NEPSE Index from 2069.04.01 –2075.09.09. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.51% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

TRADED SCRIPTS STATS



MARKET OVERVIEW

NEPSE fell by 6.45 point on Monday to close at 1191.74. Throughout the day, it traded between 1190.80 low and 1207.88 high. Total turnover amounted Rs.79.87 crores on the day while Volumes and Transactions numbers also declined as compared to Sunday's data. The sensitive index which measure the performance of Group "A" categorized companies posted a 0.66% fall while float and sensitive float index fell by 0.68% and 0.75% respectively.

Of the 11 Sub-Indices, only 4 turned Green and rest closed Red. Life insurance gained highest (1.21%), followed by Finance (0.83%). Major losers were Trading (4.8%), Hotels (1.84%) and Development Bank (1.17%). Banking lost 0.98% on the day.

MPFL, GBBL and SWBBLP underperformed the most as compared to its sector performance while KEBL, RMDC and NSEWA performed relatively well. GBBL, NMBMF and NLICL were the most volatile stocks. KPCL and BBC are trading at all-time low. PMHPL, KPCL and CORBL are trading closer to 52 weeks low. ALICL, and NLIC are up for 6 consecutive days while KNBL is falling for 4 days.

4 stocks made positive circuit on the day which includes HATH (10%), GILB (10%), CLBSL (9.95%) and HIDCL (9.87%).

BFI's are expected to reduce the interest rates on loan effective from 1st Magh 2075. Earlier Banks had reinstated the Gentlemen's agreement by lowering the interest rates on deposits. BFI's are required to calculate the new base rate for determining the new interest rates. The reduced rates on loan is expected to boost the share and capital markets.

MAJOR MARKET NEWS

- ☑ NICA extended its branches to 272 (*highest*), latest branch at Inaruwa - 1 Shantichoak and at Barahachetra - 10, Prakashpur of Sunsari district.
- ☑ PCBL extended its branches to 67, latest branch at Suryavinayak Nagarpalika of Bhaktapur.
- ☑ Province 3 to enforce Project Bank by next fiscal year; aim to streamline the development and other social projects in the province.
- ☑ SBL price adjusted for 5% bonus share



- 📌 HIDCL to propose 10% bonus and 100% right shares for its 7th AGM on 30th Poush 2075; Book closure date on 17th Poush 2075
- 📌 NHDL to propose 4% bonus in coming AGM
- 📌 SEF Mangshir NAV fell to Rs.10.37 from Rs.10.45 of previous month;
- 📌 SEOS Mangshir NAV fell to Rs.10.16 from Rs.10.42 of previous month;

MAJOR EVENTS (On Tuesday)

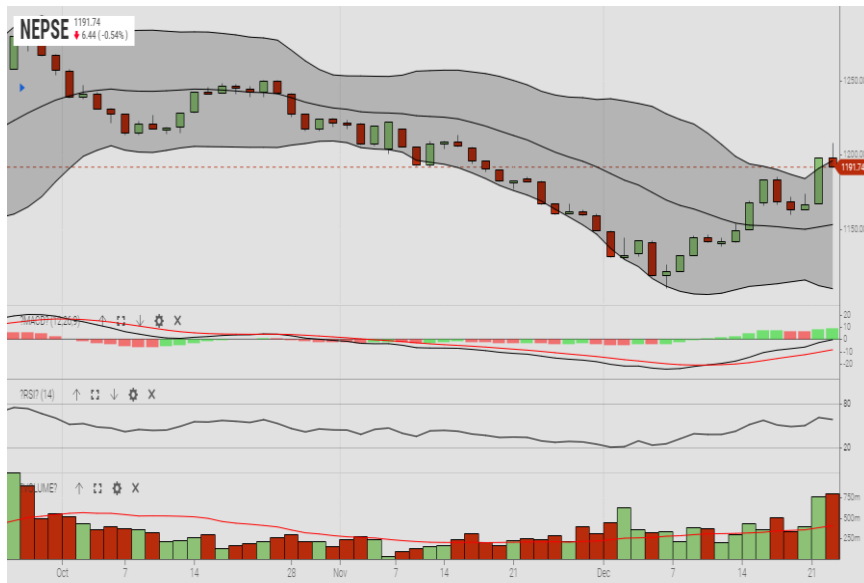
- 📌 EBL 24th AGM, 20% Cash Dividend
- 📌 Book closure date for 8th AGM of MMFDB
- 📌 Book closure date for 17th AGM of SWBBL
- 📌 10.5% SBL Debenture 2082
- 📌 10% Sanima Debenture 2085

GLOBAL INDICES		
SENSEX	35,470.15	-271.92
NIFTY	10,663.50	-90.50
S&P 500	2,393.52	-23.51
DJIA	22,236.62	-208.75
NIKKEI 225	20,166.19	-226.39

TOP 5 SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	213.00
	Nepal Bank Ltd.	NBL	306.00
	Citizen Bank International Limited	CZBIL	218.00
	Prabhu Bank Ltd.	PRVU	250.00
	Nepal Bangladesh Bank Ltd.	NBB	200.00
FAIRLY PRICED	Civil Bank Ltd	CBL	164.00
	Sunrise Bank Limited	SRBL	230.00
	Kumari Bank Limited	KBL	247.00
	NIC Asia Bank Ltd.	NICA	386.00
	Sanima Bank Limited	SANIMA	310.00
OVER PRICED	Nepal Investment Bank Ltd.	NIB	676.00
	Standard Chartered Bank Limited	SCB	619.00
	Nabil Bank Ltd.	NABIL	868.00
	NMB Bank Ltd.	NMB	387.00
	Himalayan Bank Limited	HBL	506.00

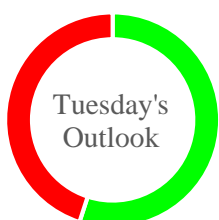
*Notes: # Above pricing is performed by averaging the prices derived as per P/E, P/B and 180 days closing averages.
Harmonic Mean of industries is carried for Pricings.*

NEPSE TECHNICAL OUTLOOKS



Date / Time	09.09.2075
Close	1191.74
Open	1198.21
High	1207.88
Low	1190.80
Turnover	798,718,053
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1196.21
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1152.85
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1109.48
RSI (14)	58
MA (20, Volume, ma, 0)	406m
MACD (12,26,9)	-0
Signal macd (12,26,9)	-9
macd (12,26,9)_hist	8

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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