



MARKET SUMMARY		
NEPSE	1178.87	-0.13%
Total Turnover (Rs.)	276,956,301	7.51%
Share Volume	797,613	6.15%
Total Transactions	3,723	10.44%
Total Market Cap. (Rs. Mill)	1,408,177.68	-0.58%
Floated Market Cap (Rs. Mill)	488,794.32	-0.74%

MARKET CAP TO GDP RATIO 46.82% ▲

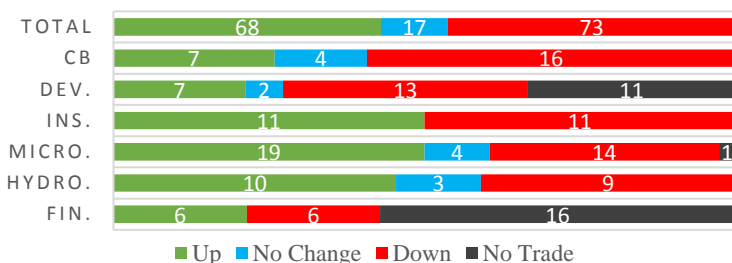
WEIGHTAGE ON MARKET CAP	
Commercial Banks	52.91%
Development Bank	5.22%
Finance	3.01%
Microfinance	6.21%
Insurance	15.07%
Hydropower	4.02%
Hotel	1.63%
Manufacturing And Processing	2.85%
Trading	0.10%
Others	8.98%
NTC	7.79%

Top Gainers	UMHL, SINDU, RHPC
Top Losers	KMCDB, HATH, SHINE
Top Stocks by Shares Traded	NBL, NCCB, API
Top Stocks by Transactions	NBL, API, NLIC
Top Stocks by Turnover	NBL, NTC, NLIC
Top Brokers by Turnover	44, 45, 49

NEPSE STATISTICS	
Average Return	17.25%
Standard Deviation	17.44%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.35

Notes: NEPSE Index from 2069.04.01 –2075.09.19. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.25% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

TRADED SCRIPTS STATS



MARKET OVERVIEW

NEPSE fell 1.56 point on Thursday, closing at 1178.87. However, Turnover, Volume and Transactions showed improvement with a modest rise. The sensitive, float and sensitive float index all posted a fall 0.19%, 0.13% and 0.15% respectively.

Three Sub-indices – Banking, Development Bank and Hydropower lost 4.36, 6.18 and 6.37 points respectively on the day. Rest sub-indices turned Green with major gainers – Life insurance (68.05 points), Hotels (18.25 points) and Non-life insurance (15.02 points).

UIC, RRHP, EIC underperformed the most as compared to its sector performance while API, NLBBL, BHL performed relatively well. KMCDB, API, UIC were the most volatile stocks. SPDL, BFC, AKJCL are trading at all-time low. NIBPO, NIC, BPCL are trading at closer to 52 weeks high while NHPC, KKHC, SHL are trading near to 52 weeks low.

NRB released a circular stating that the Development banks and Finance companies opting Merger and Acquisition for meeting the capital requirements shall be given priority for class upgradation. While the companies failing to meet the capital requirements within the stipulated time frame will be directed for forceful merger.

Besides, NRB has issued a notice stating to deposit Rs. 1.48 billion in fixed deposits of various BFI's fulfilling the conditions as set by NRB. The amount will be deposited for a period of 364 days from Magh 02, 2075 till Posh 29, 2076. Interested BFI's can submit the application bidding their interest price till 3 PM of 22nd Poush, 2075.

MAJOR MARKET NEWS

- CHLBS -ticker of Chautari Laghubitta Bittiya Sanstha
- CHCL price adjusted for 20% Bonus shares.
- Kalika Laghubitta Bittiya Sanstha Ltd. (KMCDB) to propose 75% Right and 8% Bonus in its coming AGM.
- Laxmi Capital Market Limited Graded 'ICRA NP Asset Management Company Quality *Three*' - meaning the company to provide adequate assurance on management quality.
- MBL brought into operation its latest branch at Koteswor of Kathmandu.
- Global IME Bank launched Global Share Lagani Saving account to facilitate the customers in performing financial clearance of their trades without the needs to visit the brokers.



Approx. Rs. 4.355 billion money reported to embezzled in the purchase of 2 Airbus A330-200 aircrafts

MAJOR EVENTS (On Friday)

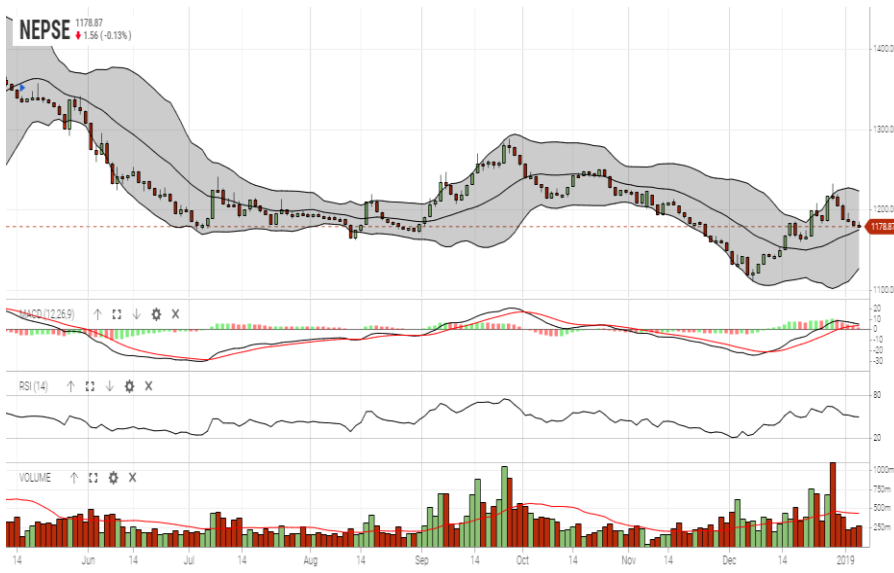
- Ghalemdi Hydropower 15,33,770 units IPO
- MBL 20th AGM
- NLBBL 12th AGM
- RMDC 20th AGM
- Sanjen Hydropower 8th AGM
- 10.5% SBL Debenture 2082
- Auction open – CCBL 409,175 units Ordinary shares and 1,461,099 units Promoters shares
- Auction open – BFC 247,310 units Ordinary shares and 557,775 units Promoters shares

GLOBAL INDICES		
SENSEX	35,513.71	-377.81
NIFTY	10,672.25	-120.25
S&P 500	2,477.88	-32.15
DJIA	23,011.20	-335.04
NIKKEI 225	20,014.77	-62.85

TOP 5 SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	213.00
	Nepal Bank Ltd.	NBL	309.00
	Citizen Bank International Limited	CZBIL	212.00
	Janata Bank Nepal Ltd.	JBNL	169.00
	Mega Bank Nepal Ltd.	MEGA	173.00
FAIRLY PRICED	Civil Bank Ltd	CBL	162.00
	Nepal Investment Bank Limited	NIB	550.00
	NMB Bank Limited	NMB	323.00
	NIC Asia Bank Ltd.	NICA	383.00
	Kumari Bank Limited	KBL	246.00
OVER PRICED	Standard Chartered Bank Limited	SCB	606.00
	Nepal SBI Bank Limited	SBI	391.00
	Sanima Bank Limited	SANMA	308.00
	Prime Commercial Bank Ltd.	PCBL	333.00
	Siddhartha Bank Limited	SBL	292.00

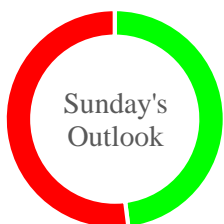
Notes: # Above pricing is performed by averaging the prices derived as per P/E, P/B and 180 days closing averages.
Harmonic Mean of industries is carried for Pricings.

NEPSE TECHNICAL OUTLOOKS



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

Date / Time	19.09.2075
Close	1178.87
Open	1180.47
High	1184.95
Low	1178.06
Turnover	276956301
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1223.18
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1174.93
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1126.68
RSI (14)	50
MA (20, Volume, ma, 0)	434m
MACD (12,26,9)	5
Signal macd (12,26,9)	4
macd (12,26,9)_hist	1



Sunday's Outlook

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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