



## MARKET OVERVIEW

MARKET SUMMARY		
NEPSE	1177.46	0.57%
Total Turnover (Rs.)	325,086,594	4.76%
Share Volume	977,359	-28.34%
Total Transactions	3,451	-18.84%
Total Market Cap. (Rs. Mill)	1,407,494.05	0.57%
Floated Market Cap (Rs. Mill)	488,065.27	0.63%

MARKET CAP TO GDP RATIO 46.80% ▲

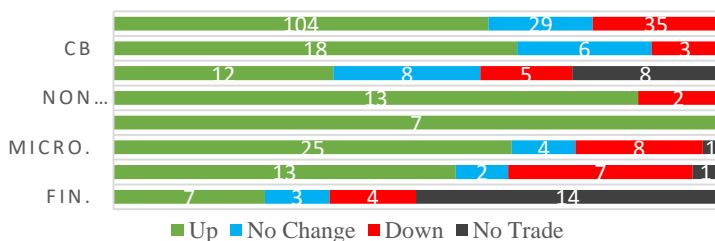
WEIGHTAGE ON MARKET CAP	
Commercial Banks	52.84%
Development Bank	5.19%
Finance	3.16%
Microfinance	6.17%
Life Insurance	8.31%
Non-life Insurance	6.81%
Hydropower	4.02%
Hotel	1.63%
Manufacturing And Processing	2.81%
Trading	0.10%
Others	8.97%
NTC	7.79%

Top Gainers	HATH, SPDL, CLBSL
Top Losers	KMFL, MERO, HBL
Top Stocks by Shares Traded	NBL, NCCB, PRVU
Top Stocks by Transactions	NCCB, NBL, PRVU
Top Stocks by Turnover	NBL, NCCB, CIT
Top Brokers by Turnover	49, 34, 44

NEPSE STATISTICS	
Average Return	17.21%
Standard Deviation	17.43%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.35

Notes: NEPSE Index from 2069.04.01 –2075.09.23. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.21% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

## TRADED SCRIPTS STATS



NEPSE gained 6.67 points on Monday, closing at 1,177.46 after the consecutive days of fall seen over the past weekend. There was a marginal gain on Turnover whereas Transactions and Volumes fell significantly. The sensitive, float and sensitive float index all posted gain of 1.37, 0.53 and 0.48 points respectively.

Except Manu. & Pro. and Others Sub-indices, all other sub-indices closed Green on the day. Major gaining sectors were Life insurance (92.69 points), Non-life insurance (82.88 points) and Hotels (17.65 points). Banking rose by 4.64 points and Microfinance by 11.53 points. Manu. & Pro. lost 12.76 points while Others lost 0.04 points.

AKJCL, KMFL and MERO underperformed the most as compared to its sector performance while HATH, SPDL and SKDBL performed relatively well. SPDL was the most volatile stocks. AHPC and AKJCL are trading at all-time low. NABIL, GRDBL, AHPC are trading closer to 52 weeks low while PCBL and NTC are trading near to 52 weeks high.

Rastriya Banijya Bank (RBB) has brought several loan products at an interest rates as low as 3.33%. These loan products are:

- ✓ Commercial Agriculture and Livestock Loan – up to NPR. 5 crore
- ✓ Educated Youth Self-Employment Loan – up to NPR. 7 Lakhs
- ✓ Youth Returned from Foreign Employment Project Loan - up to NPR. 10 Lakhs
- ✓ Business Loan to uplift under privilege community - up to NPR. 10 Lakhs
- ✓ Higher and Technical or Commercial Education Loan - up to NPR. 5 Lakhs
- ✓ Loan for Earthquake Victims for building their residence - up to NPR. 3 Lakhs
- ✓ Mahila Udhyamshil Karja – up to NPR. 15 Lakhs

## MAJOR MARKET NEWS

- 📌 NTC appointed Mr. Dilli Adhikari as the new Managing Director; vows to make NTC more competitive and professional along with extending the 4G service nationwide.
- 📌 CBBL clarifies over NRB notice regarding its proposed 40% dividend as ‘only the postponement, not cancellation’.
- 📌 Ghalemndi Hydro Limited 15,33,770 units IPO to the General Public closed; Issue oversubscribed by more than two times.



- “10.5% SBL Debenture 2082” closed; collected only Rs.5 crore out of Rs.45 crore issued to the General Public
- Joshi Hydro Power open range Rs.93.67 to Rs.281.01.

### MAJOR EVENTS (On Tuesday)

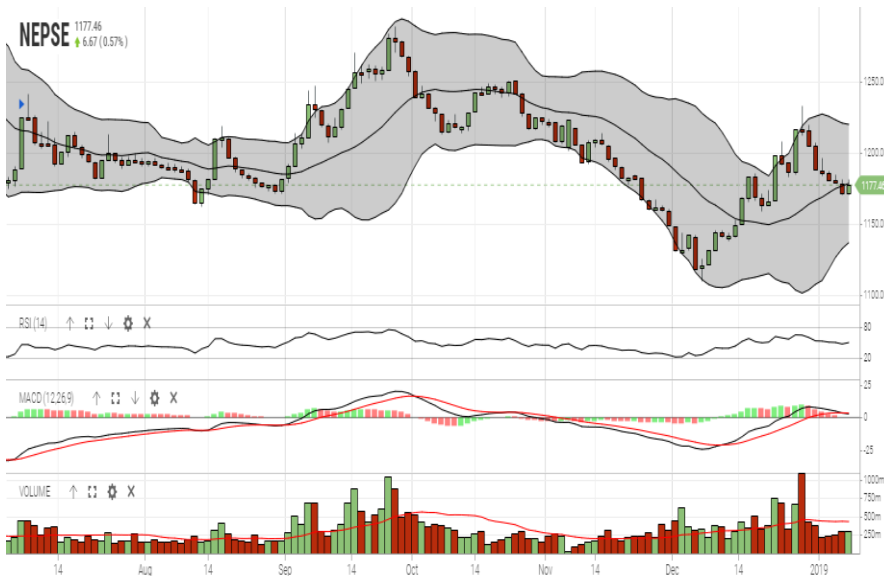
- AMFI 4<sup>th</sup> AGM; 70% Right Shares
- API 15<sup>th</sup> AGM; 5% Bonus Shares
- Right Open – IGI 80%, NADEP 100%
- Auction open – *Ordinary shares*: CCBL 409,175 units, BFC 247,309.90 units; *Promoters shares*: CCBL 1,461,099 units, BFC 557,774.57 units, NNLB 47,763 units, and LBBL 344,946.44 units

GLOBAL INDICES		
SENSEX	35,850.16	+155.06
NIFTY	10,771.80	+44.50
S&P 500	2,546.62	+14.68
DJIA	23,502.47	+69.31
NIKKEI 225	20,038.97	+477.01

COMMERCIAL BANKS SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	220.00
	Nepal Bank Ltd.	NBL	308.00
	Citizen Bank International Limited	CZBIL	212.00
	Janata Bank Nepal Ltd.	JBNL	168.00
	Mega Bank Nepal Ltd.	MEGA	172.00
FAIRLY PRICED	NIC Asia Bank Ltd.	NICA	379.00
	Civil Bank Ltd	CBL	164.00
	NMB Bank Limited	NMB	324.00
	Kumari Bank Limited	KBL	246.00
	Nepal Investment Bank Limited	NIB	551.00
OVER PRICED	Standard Chartered Bank Limited	SCB	600.00
	Nabil Bank Limited	NABIL	835.00
	Bank of Kathmandu Ltd.	BOK	332.00
	Prime Commercial Bank Ltd.	PCBL	338.00
	Everest Bank Limited	EBL	532.00

*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	24.09.2075
Close	1177.46
Open	1170.72
High	1181.17
Low	1170.36
Turnover	325,086,594
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1219.99
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1178.55
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1137.11
RSI (14)	49
MA (20, Volume, ma, 0)	433m
MACD (12,26,9)	3
Signal macd (12,26,9)	3
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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