



MARKET OVERVIEW

MARKET SUMMARY		
NEPSE	1,177.07	-0.03%
Total Turnover (Rs.)	342,786,596	5.44%
Share Volume	1,109,020	13.47%
Total Transactions	3,573	3.54%
Total Market Cap. (Rs. Mill)	1,408,474.97	0.07%
Floated Market Cap (Rs. Mill)	488,681.70	0.13%

MARKET CAP TO GDP RATIO 46.80% ▲

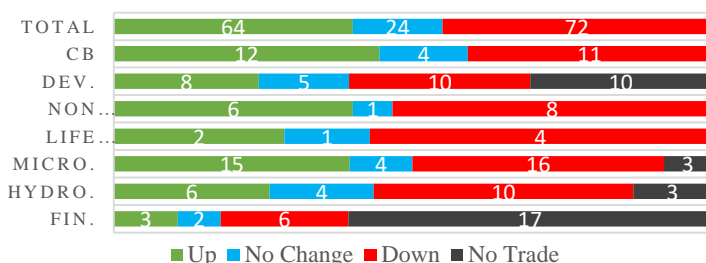
WEIGHTAGE ON MARKET CAP	
Commercial Banks	52.80%
Development Bank	5.20%
Finance	3.12%
Microfinance	6.20%
Life Insurance	8.32%
Non-life Insurance	6.77%
Hydropower	4.05%
Hotel	1.62%
Manufacturing And Processing	2.82%
Trading	0.10%
Others	9.01%
NTC	7.82%

Top Gainers	AMFI, CHLBS, STC
Top Losers	NMBMF, KMCDB, SMFDB
Top Stocks by Shares Traded	NBL, NCCB, BOKL
Top Stocks by Transactions	NBL, BOKL, AKJCL
Top Stocks by Turnover	NBL, BOKL, NCCB
Top Brokers by Turnover	49, 44, 10

NEPSE STATISTICS	
Average Return	17.19%
Standard Deviation	17.43%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.36

Notes: NEPSE Index from 2069.04.01 –2075.09.24. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.19% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

TRADED SCRIPTS STATS



NEPSE posted negligible drop of 0.40 points to close at 1177.07 level on Tuesday. However, there was an increment on Share volumes, Total Transactions, mounting the Turnover amount as compared to earlier day. Sensitive and Sensitive Float index lost only 0.09 point and 0.01 point respectively while Float index showed no change.

Under Sub-indices, Microfinance, Manu. & Pro., Development Banks and Others made a minor gain of 5.42, 5.07, 1.61 and 1.02 points respectively. Major losers were Non-life insurance (38.13 points), Hotels (11.96 points), Life Insurance (11.92 points). Banking lost 0.09 points only.

NMBMF, KMCDB and SMFDB underperformed the most as compared to its sector performance while AMFI, AKJCL and NGPL performed relatively well. AMFI, KMCDB, and NGPL were the most volatile stocks. STC made new high closing at Rs.456. NABIL, RLFL, GRDBL are trading closer to 52 weeks low while NTC, NIBPO and PCBL are trading near to 52 weeks high.

SEBON has made certain special provisions for the implementation of report of Suggestion Committee regarding the development of Monetary and Capital Market. As per the Press Release on Tuesday, SEBON has clarified that the companies with the least Credit Rating will not be allowed to issue IPO, underwriting of all IPO shares should be done, Premium of *twice the net worth per share* at maximum is allowed for issuing IPO while Premium cannot exceed net worth per share for issuing FPO and issue at least 40% of Debenture/Bonds to the public.

MAJOR MARKET NEWS

- IPO of Ghalemdi Hydro Ltd. is oversubscribed by 2.82 times; 55,843 applicants applied for 4,322,460 units of shares
- NEPSE suspended the trading of shares of Sahara Bikas Bank Ltd. due to incomplete disclosure of information regarding announcement of dividends.
- PCBL brought into operation its 70th Branch in Tumbewa Gaupalika of Panchthar district.
- CZBIL stationed Surkhet as Provincial office for Karnali Province; Provincial office to monitor and coordinate the branches of bank in the Province.



- ☑ KMCDB published notice regarding its 9th AGM; AGM to be on 19th Magh 2075 at Syangja.
- ☑ NEPSE has listed 11,50,000 Units Rights Share of Swadeshi Laghubitta Bittiya Sanstha Ltd.
- ☑ BOD meeting of PLIC has accepted the resignation of Mr. Amrit Kharel from Independent Director.

MAJOR EVENTS (On Wednesday)

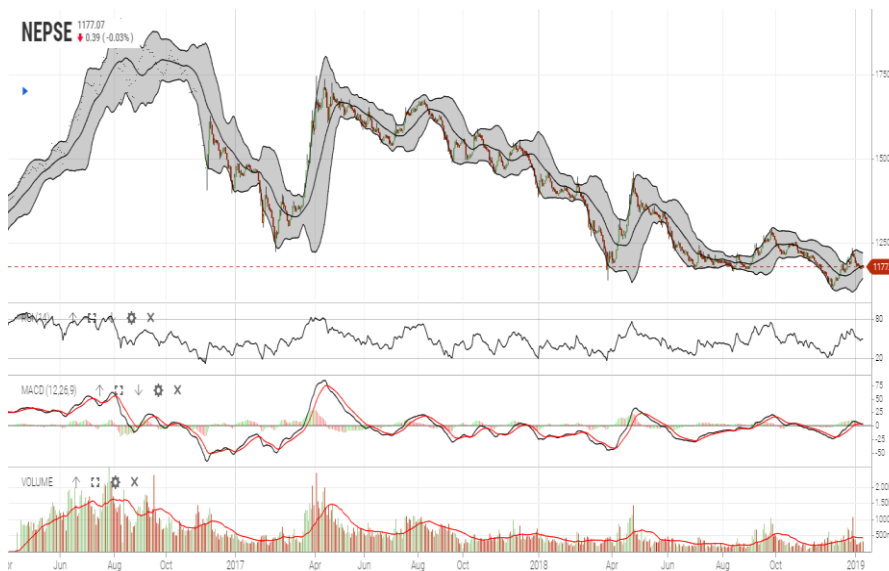
- ☑ Himalayan Distillery Ltd. 18th AGM; 21.05% Cash Dividend
- ☑ CDS & Clearing Ltd. 8th AGM; 20% Cash Dividend

GLOBAL INDICES		
SENSEX	35,980.93	+130.77
NIFTY	10,802.15	+30.35
S&P 500	2,576.28	+26.59
DJIA	23,813.19	+281.84
NIKKEI 225	20,204.04	+165.07

COMMERCIAL BANKS SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	218.00
	Nepal Bank Ltd.	NBL	307.00
	Citizen Bank International Limited	CZBIL	213.00
	Mega Bank Nepal Ltd.	MEGA	171.00
	Janata Bank Nepal Ltd.	JBNL	170.00
FAIRLY PRICED	Civil Bank Ltd	CBL	162.00
	NMB Bank Limited	NMB	326.00
	Nepal Investment Bank Limited	NIB	546.00
	NIC Asia Bank Ltd.	NICA	382.00
	Kumari Bank Limited	KBL	247.00
OVER PRICED	Standard Chartered Bank Limited	SCB	603.00
	Nabil Bank Limited	NABIL	837.00
	Bank of Kathmandu Ltd.	BOKL	332.00
	Everest Bank Limited	EBL	531.00
	Prime Commercial Bank Ltd.	PCBL	336.00

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	1,177.07
Open	1,177.87
High	1,180.85
Low	1,175.99
Turnover	342,786,596
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1,218.09
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1,180.35
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1,142.61
RSI (14)	49
MA (20, Volume, ma, 0)	432m
MACD (12,26,9)	2
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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