



MARKET OVERVIEW

MARKET SUMMARY		
NEPSE	1,180.84	0.13%
Total Turnover (Rs.)	366,324,164	5.30%
Share Volume	1,387,592	-8.34%
Total Transactions	3,872	20.81%
Total Market Cap. (Rs. Mill)	1,412,988.47	0.09%
Floated Market Cap (Rs. Mill)	490,486.12	0.12%

MARKET CAP TO GDP RATIO 46.98% ▲

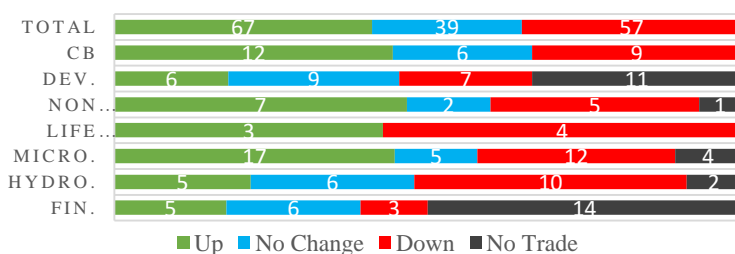
WEIGHTAGE ON MARKET CAP	
Commercial Banks	52.84%
Development Bank	5.19%
Finance	3.13%
Microfinance	6.22%
Life Insurance	8.31%
Non-life Insurance	6.78%
Hydropower	4.03%
Hotel	1.62%
Manufacturing And Processing	2.82%
Trading	0.10%
Others	8.97%
NTC	7.77%

Top Gainers	SAEF, SMB, JEFL
Top Losers	SPDL, PURBL, SHINE
Top Stocks by Shares Traded	NBL, NHPC, KBL
Top Stocks by Transactions	KBL, NBL, SCB
Top Stocks by Turnover	NBL, KBL, NLIC
Top Brokers by Turnover	49, 58, 25

NEPSE STATISTICS	
Average Return	17.22%
Standard Deviation	17.41%
Standard Error	1.15%
Skewness	0.44
Kurtosis	3.37

Notes: NEPSE Index from 2069.04.01 –2075.09.26. Avg. annual trade days 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 17.22% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

TRADED SCRIPTS STATS



NEPSE made an uptick of 1.48 points on Thursday to close at 1,180.84. Total Number of Transaction rose to 3,872 from the trade of 163 scripts which resulted to increase in Turnover amount, though the volume of shares fell slightly. Sensitive, Float and Sensitive Float index increased 0.39, 0.14 and 0.15 points respectively.

Under sub-indices, Non-life insurance gained the most with 22.17 points. Life insurance, Microfinance and Banking gained 5.96, 5.7 and 1.58 points respectively. Manu. & Pro, and Development Bank lost 5.82 and 6.6 points respectively.

SPDL, PURBL and PMHPL underperformed the most as compared to its sector performance while SMB, TRH, and RHPC performed relatively well. SMB, UMB, SPDL were the most volatile stocks. NABIL, BARUN, RRHP are trading closer to 52 weeks low while JEFL, NTC and PCBLP are trading near to 52 weeks high. JFL, KSBBL and SMATA have falling investors participation and NHPC, PURBL and GUFL have rising participations.

As per the SEBON latest amendments, the companies receiving the lowest credit rating from the Rating Agency will be barred from issuance of IPO.

Provided the company has already issued the IPO to the local of project affected areas before draft of this provision then this provision will not apply, allowing the company to issue IPO to the General Public as well.

MAJOR MARKET NEWS

- NEPSE has listed 10,59,00,000 units Ordinary Shares of Upper Tamakoshi Hydropower Ltd; Trading to commence from Sunday.
- DDBL price adjusted for 10% Bonus shares.
- Mr Basudev Adhikari appointed as new Chairman of Nepal Bank Limited.
- BOD meeting of KBL proposed 8.5% Bonus shares for the FY 2074/75 for its upcoming AGM
- BOD meeting of LBL proposed 8.5% Bonus shares for the FY 2074/75 for its upcoming AGM
- Swabhimaan Microfinance Bittiya Sanstha Ltd. has applied to SEBON for approval of Rs.1.80 crores of IPO issuance.
- NEPSE to propose 66.67% Bonus shares for its upcoming AGM; Paid up capital to reach Rs.50 crores post issuance.



MAJOR EVENTS (On Friday)

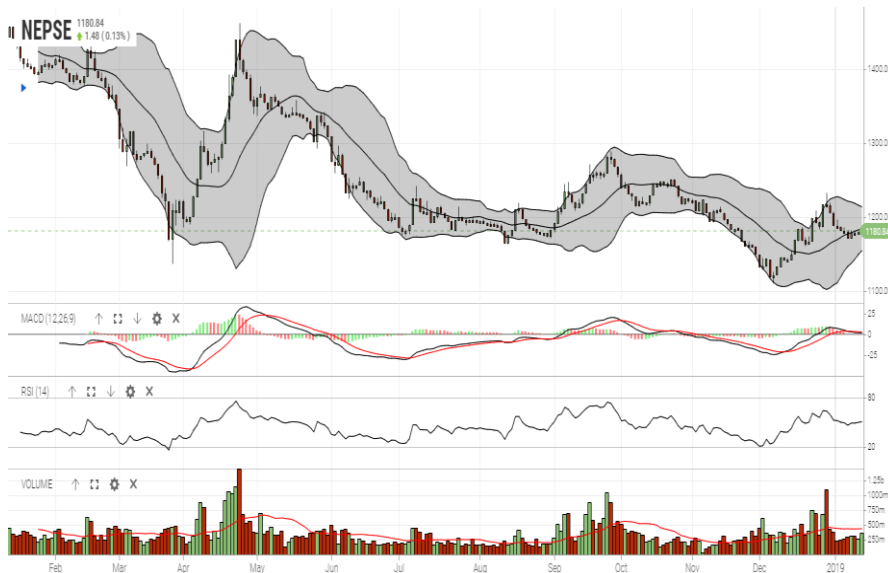
- 📌 Shiva Shree Hydropower Ltd. 1,476,400 units IPO to the local of Sindhupalchowk District.
- 📌 Universal Power Company Ltd. 2,100,350 units IPO to local of Gaurishankar Rural Municipality, Kalinchowk Rural Municipality, Bigu Rural Municipality
- 📌 GBIME 12th AGM
- 📌 CHCL 22nd AGM
- 📌 BPCL 26th AGM
- 📌 PURBL 11th AGM
- 📌 SMFDB 10th AGM
- 📌 RBB Merchant Banking Ltd. 3rd AGM
- 📌 Book closure date for 14th AGM of KRBL

GLOBAL INDICES		
SENSEX	36,106.50	-106.41
NIFTY	10,821.60	-33.55
S&P 500	2,580.92	-4.04
DJIA	23,852.78	-26.34
NIKKEI 225	20,163.80	-263.26

COMMERCIAL BANKS SCRIPTS PRICINGS			
	Script Name	Ticker	LTP
UNDER PRICED	Nepal Credit And Commercial Bank	NCCB	220.00
	Nepal Bank Ltd.	NBL	307.00
	Janata Bank Nepal Ltd.	JBNL	168.00
	Mega Bank Nepal Ltd.	MEGA	171.00
	Citizen Bank International Limited	CZBIL	214.00
FAIRLY PRICED	Laxmi Bank Limited	LBL	225.00
	Civil Bank Ltd	CBL	163.00
	Nepal Investment Bank Limited	NIB	547.00
	NMB Bank Limited	NMB	325.00
OVER PRICED	Siddhartha Bank Limited	SBL	294.00
	Standard Chartered Bank Limited	SCB	608.00
	Nabil Bank Limited	NABIL	835.00
	Bank of Kathmandu Ltd.	BOKL	332.00
	Everest Bank Limited	EBL	536.00
	Prime Commercial Bank Ltd.	PCBL	334.00

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	26.09.2075
Close	1,180.84
Open	1,179.60
High	1,183.19
Low	1,179.60
Turnover	366,324,164
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1,213.35
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1,183.86
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1,154.38
RSI (14)	51
MA (20, Volume, ma, 0)	438m
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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