



MARKET SUMMARY		
NEPSE	1,153.98	-0.64%
Total Turnover (Rs.)	360,709,780	-2.84%
Share Volume	1,393,558	-5.71%
Total Transactions	4,819	-13.42%
Total Market Cap. (Rs. Mill)	1,410,075.53	-0.64%
Floated Market Cap (Rs.Mill)	494,690.86	-0.77%

MARKET CAP TO GDP RATIO	46.88% ▼
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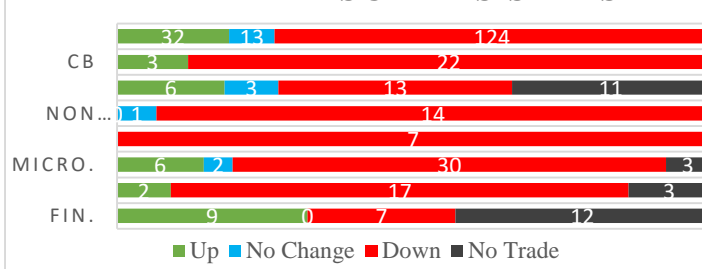
WEIGHTAGE ON MARKET CAP	
Commercial Banks	51.98%
Development Bank	5.18%
Finance	3.43%
Microfinance	6.25%
Life Insurance	8.14%
Non-life Insurance	6.63%
Hydropower	5.79%
Hotel	1.62%
Manufacturing And Processing	2.57%
Trading	0.11%
Others	8.31%
NTC	7.27%

Top Gainers	UFL, MPFL, ALBSL
Top Losers	JSLBB, KKHC, RRHP
Top Stocks by Shares Traded	GBIMEP, SHINE, CBL
Top Stocks by Transactions	UPPER, NLIC, EBL
Top Stocks by Turnover	GBIMEP, SHINE, EBL
Top Brokers by Turnover	49, 47, 34

NEPSE STATISTICS	
Average Return	16.37%
Standard Deviation	17.27%
Standard Error	1.14%
Skewness	0.45
Kurtosis	3.40

Notes: NEPSE Index from 2069.04.01 – 2075.12.04. Avg. annual trade day's 229. Lognormal return is used. Skewness shows market is asymmetrically skewed to right, indicating average return of 16.37% more affected by outliers. Further excess kurtosis shows fat tail and more peaked distribution than normal.

### TRADED SCRIPTS STATS



### MARKET OVERVIEW

After experiencing increase in its index on the first day of trading, NEPSE closed red on Monday registering a fall of 7.47 points and closing at 1153.98. Turnover, share volume and total transactions all decreased by 2.84%, 5.71% and 13.42% respectively. The trade of 169 scripts resulted in a total turnover of NPR 36.07 crores. Sensitive, Float and Sensitive Float also reported a marginal loss of 1.62, 0.65 and 0.63 points respectively.

All sectors closed red at the end of the trading day except Finance and Manu & Pro. Life Insurance followed by Non-Life Insurance lost most points of 76.53 points and 60.46 points respectively. However, Finance and Manu & Pro. registered a mild increase in its indices by 4.38 and 7.66 points respectively. Banking and Microfinance lost by 6.37 and 10.68 points respectively.

JSLBB, KKHC and KMCDB underperformed the most as compared to its sector performance while UFL, MPFL and UMHL outperformed its respective sectors. GUFL, UFL and JSLBB were the most volatile stocks. NNLB, CEFL and JSLBB are trading closer to 52 weeks low while UFL, PROFL and PRVU are trading near 52 weeks high.

UFL and MPFL gained maximum of 8.72% and 7.14% respectively.

SEBON is looking forward to reduce the broker commission rate range. The commission rate is currently 0.4%- 0.6%, and the reduction would lead to commission rate being 0.3% -0.4%. Furthermore, the lower limit is yet to be finalized, however upper limit is unlikely to exceed 0.4%

### MAJOR MARKET NEWS

- Hathway Finance has called its 22<sup>nd</sup> AGM on 26<sup>th</sup> Chaitra, 2075. The agenda of the AGM includes cancellation of 180% right shares following acquisition by Global IME Bank Ltd.
- The 456MW Upper Tamakoshi Hydroelectric Project has reported a physical progress of 98%.
- NRB is issuing Weighted Treasury Bills worth NPR 13.79 arba (91 days-4.2188% and 364 days-4.7397%).
- TNBL and MIDBL are on the verge of merger. The MOU for the same has been signed.
- NEPSE lists 25% bonus shares of SKBBL and 10% bonus shares of DDBL.



SEBON has urged investors to maintain patience and not cause disruption during the Investment Summit to be held on Chaitra 15 and 16, 2075.

### Major Events (Today)

- Jebils Finance calls to place the bids for 340,955.50 units of promoter shares.
- Right Share Issue open for 20%, 100% and 65% of UMB, MERO, and NICL respectively.
- Today is the last day to hold the shares of GLICL to be eligible for 8% bonus shares and 50% right shares.

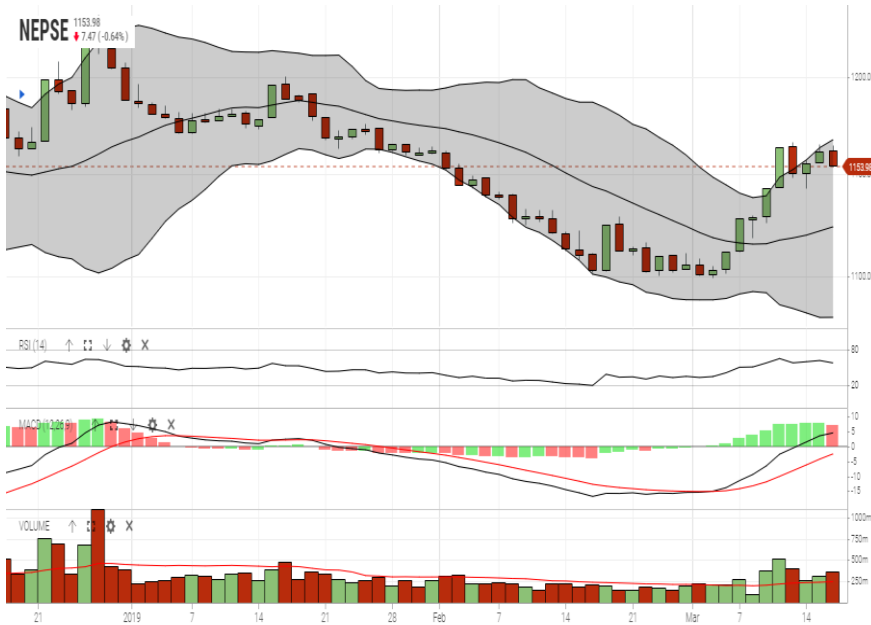
GLOBAL INDICES		
SENSEX	38,095.07	+70.75
NIFTY	11,462.20	+35.35
S&P 500	2,822.48	+14.00
DJIA	25,848.87	+138.93
NIKKEI 225	21,584.50	+133.65

	Scrip Name	Ticker	LTP
UNDER PRICED	Agriculture Development Bank Ltd.	ADBL	301.00
	Nepal Bank Ltd.	NBL	290.00
	Bank of Kathmandu Ltd.	BOKL	248.00
	Prabhu Bank Limited	PRVU	234.00
	Laxmi Bank Limited	LBL	199.00
FAIRLY PRICED	Sunrise Bank Limited	SRBL	219.00
	Civil Bank Limited	CBL	155.00
	Global IME Bank Limited	GBIME	268.00
	Kumari Bank Limited	KBL	236.00
OVER PRICED	NMB Bank Limited	NMB	325.00
	Standard Chartered Bank Limited	SCB	583.00
	Everest Bank Limited	EBL	556.00
	Nepal Investment Bank Ltd.	NIB	541.00
	Himalayan Bank Limited	HBL	470.00
Nepal SBI Bank Limited	SBI	394.00	

Notes: # Above pricing is performed by averaging the prices derived as per P/E, P/B and 180 days closing averages. Based on Published Q2 75/76 data.

# Harmonic Mean of industries is carried for Pricings.

### NEPSE TECHNICAL OUTLOOKS



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

Date / Time	04.12.2075
Close	1,153.98
Open	1,161.73
High	1,164.69
Low	1,153.60
Turnover	360,709,780
Bollinger Bands Top Bollinger Bands (20,2,ma,y)	1,167.57
Bollinger Bands Median Bollinger Bands (20,2,ma,y)	1,124.07
Bollinger Bands Bottom Bollinger Bands (20,2,ma,y)	1,080.56
RSI (14)	58
MA (20, Volume, ma, 0)	246m
MACD (12,26,9)	5
Signal macd (12,26,9)	-2
macd (12,26,9)_hist	7



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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