

NEPAL LIFE CAPITAL

WEEKLY

MARKET UPDATE

Week: (2025-5-25 to 2025-5-30)



Contents

Market Movement	1
Daily Turnover	2
Sub-Indices Performance	2
Daily Sector Movement	3
Investors Choice	4
Gainers and Losers	5
Technical Overview	7
Major Rates and Ratios	8
Upcoming Events	9

Market Movement

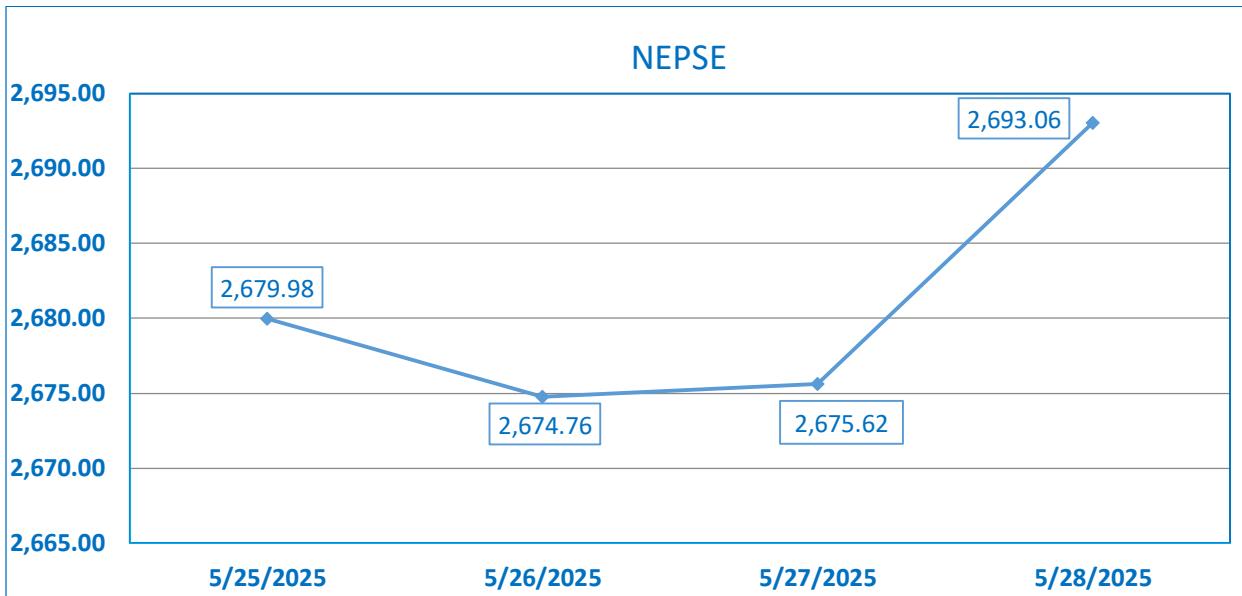


Figure 1: Market Movement for NEPSE index.

For the week of 25th May to 28th May, the NEPSE index traded with an average volume of 7,577 Arba rising 4.51 points (0.17%) to close at 2,693.06.

Daily Turnover

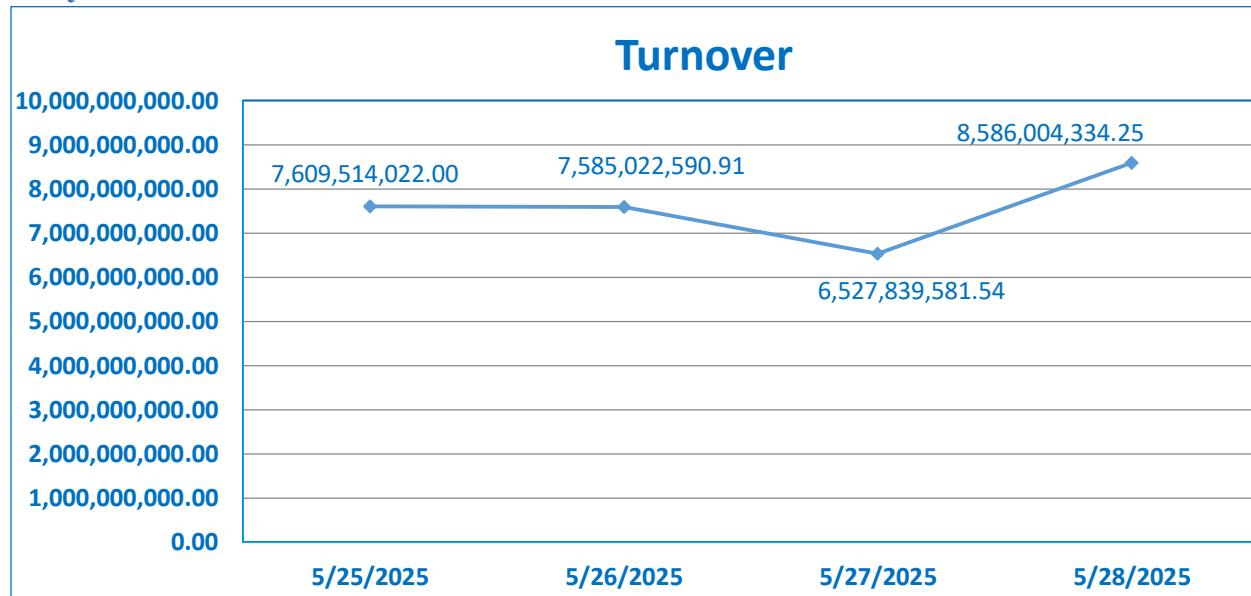


Figure 2: Turnover for NEPSE index.

The turnover for the current week has been displayed above.

Sub-Indices Performance

Indices	23rd May	30th May	Return
Banking	1,395.24	1,420.24	1.79%
Manufacturing & Processing	7,162.55	7,286.22	1.73%
Development Bank	5,504.36	5,569.95	1.19%
Trading	4,302.86	4,345.31	0.99%
Hydropower	3,450.06	3,471.06	0.61%
Microfinance	4,861.42	4,831.23	-0.62%
Others	2371.26	2342.08	-1.23%
Non-Life Insurance	12,568.39	12,411.32	-1.25%
Life Insurance	13,379.88	13,201.56	-1.33%
Investment	112.46	110.87	-1.41%
Finance	2,434.56	2,397.16	-1.54%
Hotels and Tourism	6923.49	6788.62	-1.95%
Mutual Fund	19.68	19.14	-2.74%

Figure 3: Weekly Returns of Sub-indices.

Daily Sector Movement

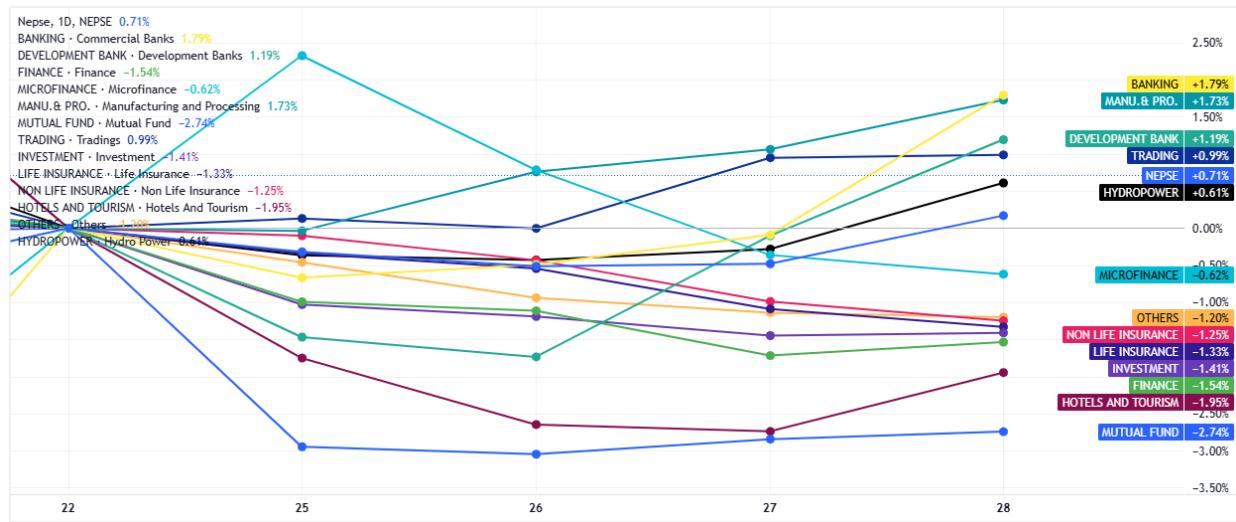


Figure 4: Daily sector movement relative to NEPSE index.

*Each dot represents the index closing point for each day of the week.

Investors Choice

In this section the stocks with the highest weekly trading volume have been showcased.

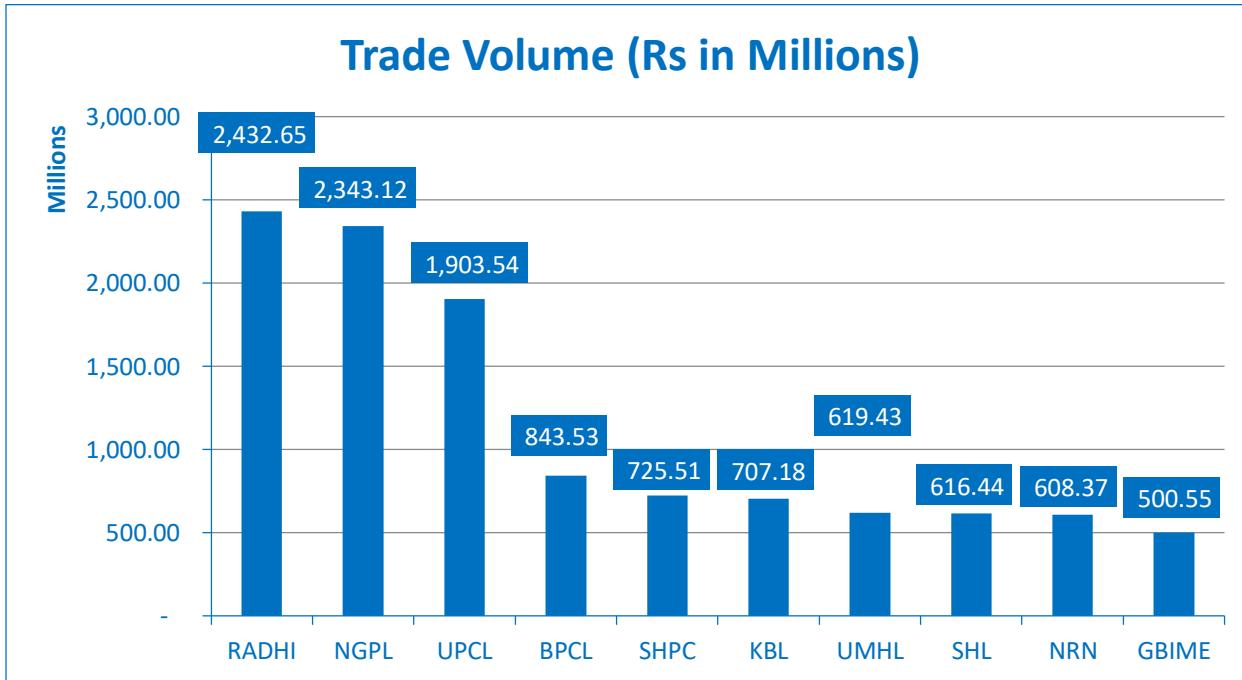


Figure 5: Top 10 Trade volume for the week.

Gainers and Losers

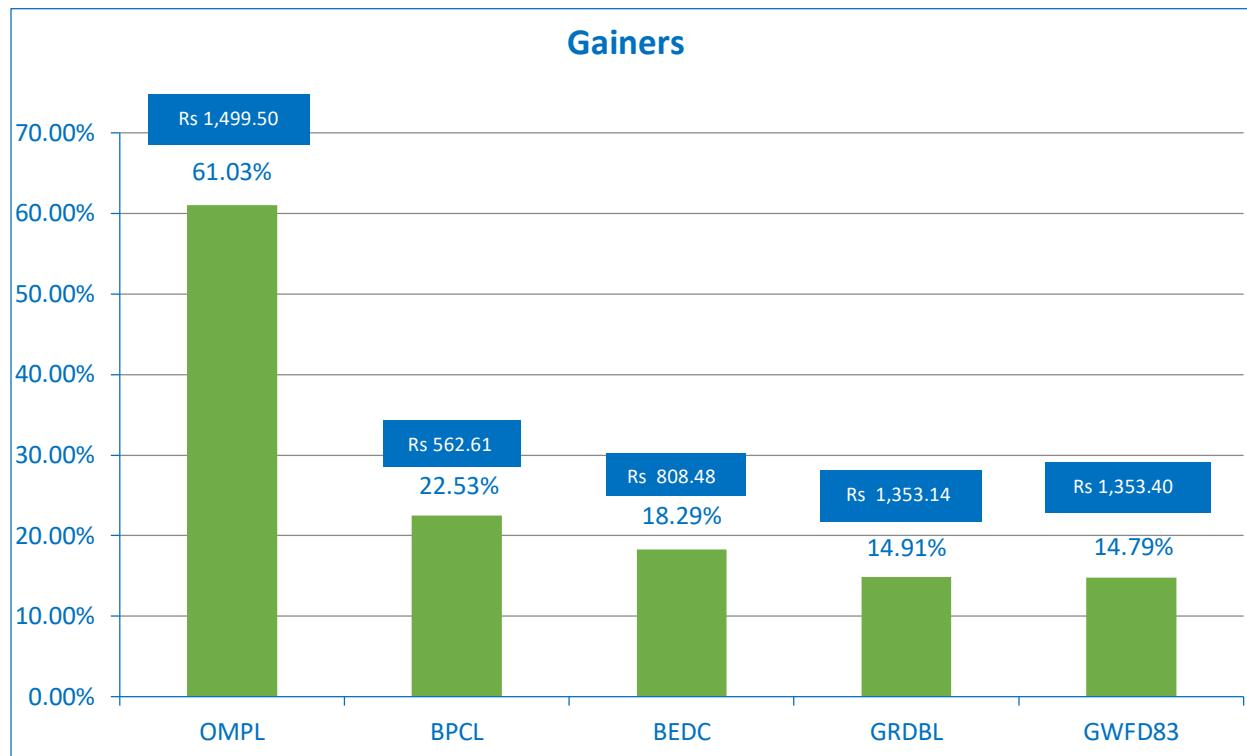


Figure 6: Top 5 Gainers for the week

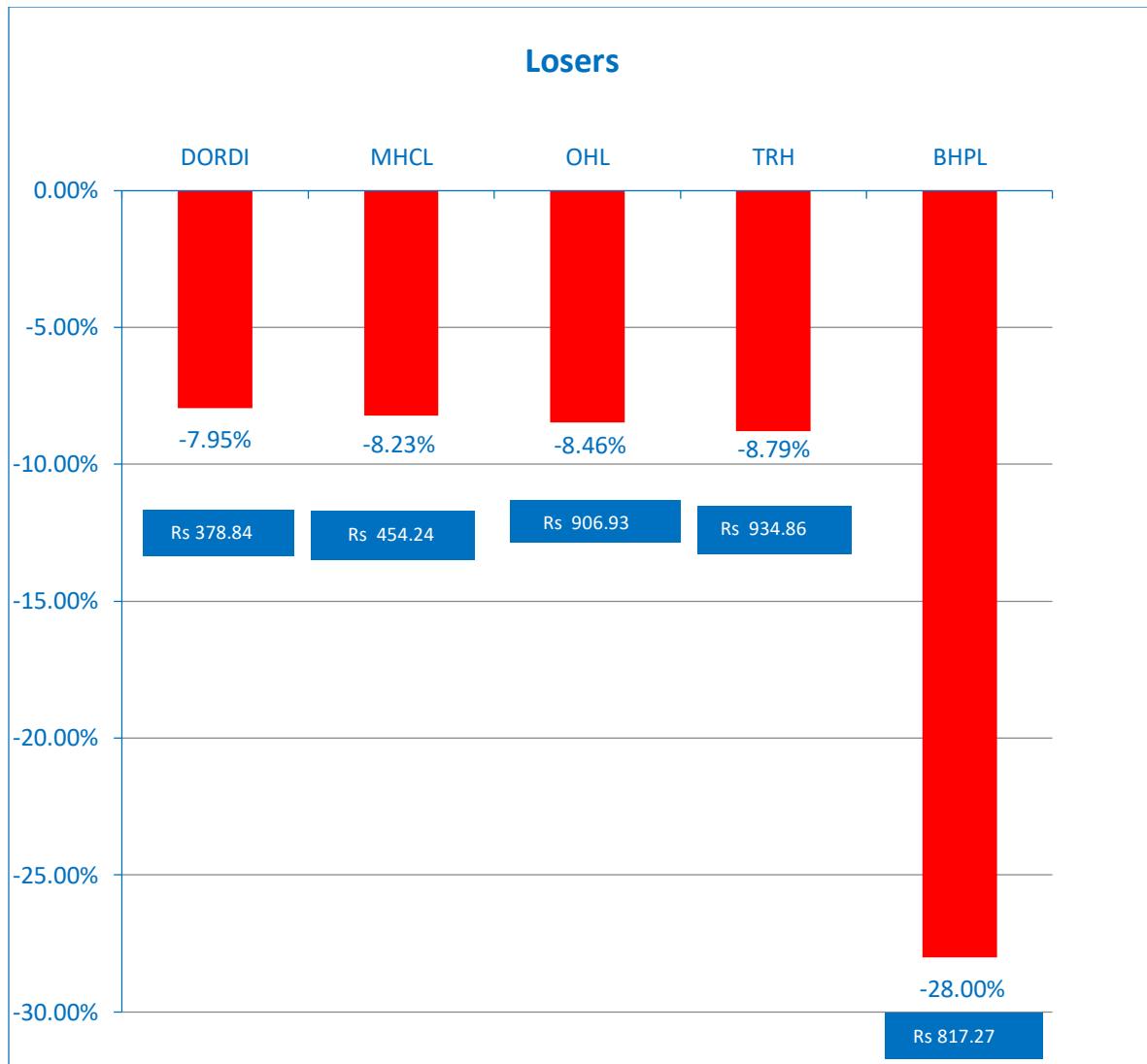


Figure 7: Top 5 Losers for the week

Technical Overview

Overall Trend:

Continuing from earlier week, the NEPSE index did not have a larger movement this week. The small retracement of the past rise had been dismissed with a similar buying force that followed throughout the week. Not all sector performed but the banking index did gain some attention this week. It does have a great potential in bringing in huge momentum in the sector as well as the index itself.

Following this week's final trading day, On Thursday the budget for the fiscal year 2082/83 has also been announced. Nepal has Announces Budget of NPR 19.64 Trillion for FY 2082/83 and a lot of major changes has also been addressed regarding the BFIS and how they shall operate. The governor had also hinted the rising NPLs in industry. The government has planned to tackle these situation by operating with asset management companies which shall help in recovering the bad loan. The government has also brought plans to punish and free the money locked in the microfinances and cooperatives. This will have a major impact on the financial condition of the general public. The general public is a major contributor to the index as there will be easing to the general public the market shall react. Along with this NRNs will now have access to the secondary market. They will easily be able to access the NEPSE and of course this will bring the major number of participants as we have our fellow working and earning class citizen all around the world. If the government does successfully execute what they have in hand. The market could head way beyond out all time high.



Figure 8: Weekly Time Frame Candlestick Pattern

Daily analysis



On a daily timeframe,

The market is just below our resistance area. Accumulation for a long time. Could we be seeing the market break through 2700s. With so much changes in the system, we can definitely expect the market to reach its new highs real soon. The indicators have been pointing out the bullishness for a very long time. Let's see if the market follows.

Further reaction and timing from the market shall reveal more about the current economic/ political situation.

Support	Resistance
Support 1: 2660	Resistance 1: 2730
Support 2: 2630	Resistance 2: 2780
Support 2: 2600	Resistance 3: 2860

Major Rates and Ratios

Description	As on	Rate/Ratio
CD Ratio	May 27, 2025	79.05
Weighted Average Interbank Interest Rate LCY	May 27, 2025	3.00 %
Weighted Average 28 days T-bill rate	May 20, 2025	2.9499%
Weighted Average 91 days T-bill rate	May 13, 2025	2.9455%
Weighted Average 182 days T-bill rate	May 20, 2025	2.9738%
Weighted Average 364 days T-bill rate	May 27, 2025	2.9774%

Average FD Rate for the month of Jestha, 2081.	
Institutional	Individual
4.39%	5.95%

Upcoming Events

Date	Events
6/1/2025	Opening Day of (50,00,000 units @ Rs.1000 per unit) "6% Nifra Harit Urja Debenture 2088/89" of Nepal Infrastructure Bank Limited.
6/2/2025	Closing Day of 32,96,505.19 units IPO shares of Trade Tower Limited to the general public.
	Closing day of Auction of 6,61,635 units of Ordinary Right Shares of Dordi Khola Hydropower Company Limited.
	Closing day of Auction of 12,85,041 units of Promoter Right Shares of Dordi Khola Hydropower Company Limited.
	8th AGM of Siuri Nyadi Power Limited.
	Closing Day of ratio 1:0.27 Right Share of Sun Nepal Life Insurance Company Limited.
6/3/2025	Book Closure Date for 9th AGM of Om Megashree Pharmaceuticals Limited.
	Closing Day of 3,54,550 units of Bikash Hydropower Company Limited to the Foreign Nepalese Immigrants.
	Closing Day of 9,09,101 units of Bikash Hydropower Company Limited to the project-affected locals of Gorkha District.
6/4/2025	Closing Day of (50,00,000 units @ Rs.1000 per unit) "6% Nifra Harit Urja Debenture 2088/89" of Nepal Infrastructure Bank Limited.
6/5/2025	Book Closure Date for 37th AGM of National Life Insurance Company Limited.
	Book Closure Date for 1:1 ratio right share of Barun Hydropower Company Limited.
	Book Closure Date for 19th AGM of NLG Insurance Company Limited.
	11th and 12th AGM of Dibyashwari Hydropower Limited.
6/6/2025	Opening Day of 25 million units of Rs 10 face value each of "Prabhu Systematic Investment Scheme".
	SGM of Jagdamba Spinning Mills Limited.
	Opening Day of ratio 1:1 Right Share of Chhyangdi Hydropower Company Limited.
	6th, 7th and 8th AGM of Maya Khola Hydropower Company Limited.
	2nd AGM of Crest Micro Life Insurance Limited.
6/7/2025	No event!

..... End.....

Disclaimer: The information on this document is provided for information purpose only. It does not constitute any offer, recommendation or solicitation to any person to enter into any transaction or adopt any hedging, trading or investment strategy, nor does it constitute any prediction of likely future movement in rates or prices or any representation that any such future movements will not exceed those shown in any illustration. Users of this document should seek advice regarding the appropriateness of investing in any securities, financial instruments or investment strategies referred to on this document and should understand that statements regarding future prospects may not be realized. Opinion, Projections and estimates are subject to change without notice. Nepal Life Capital Limited will not be liable for any losses arising out of this document.