

NEPAL LIFE CAPITAL

WEEKLY

MARKET UPDATE

Week: (2025-3-30 to 2025-4-4)



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Market Movement

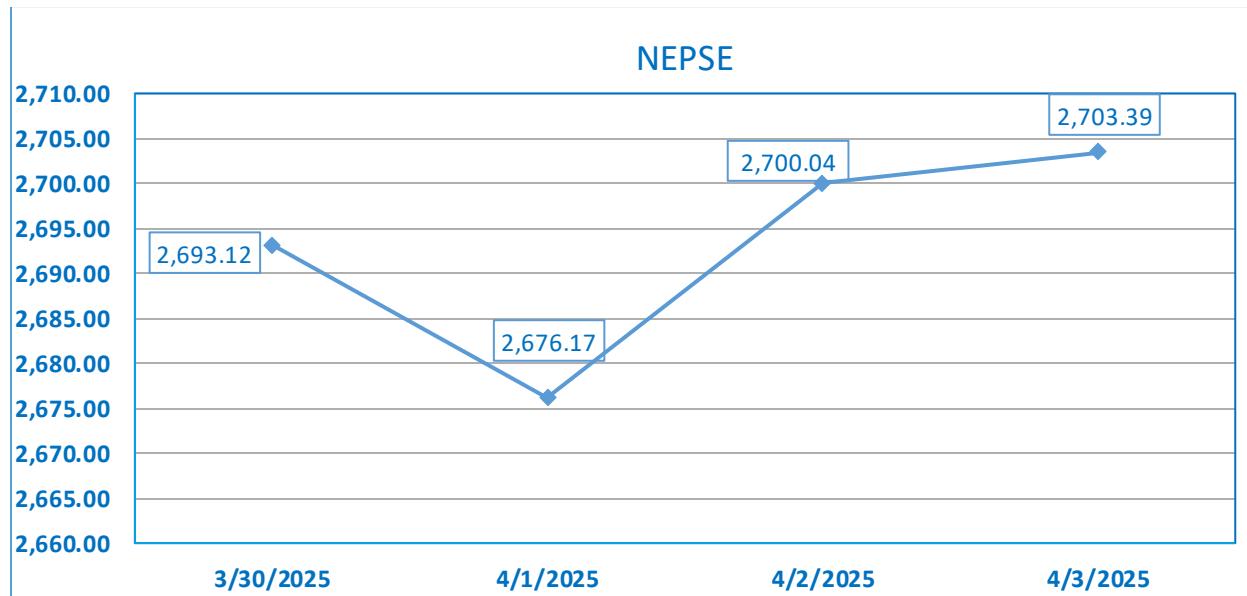


Figure 1: Market Movement for NEPSE index.

For the week of 30th March to 3rd April, the NEPSE index traded with an average volume of 6.663 Arba rising 40.09 points (1.51%) to close at 2,703.39.

Daily Turnover

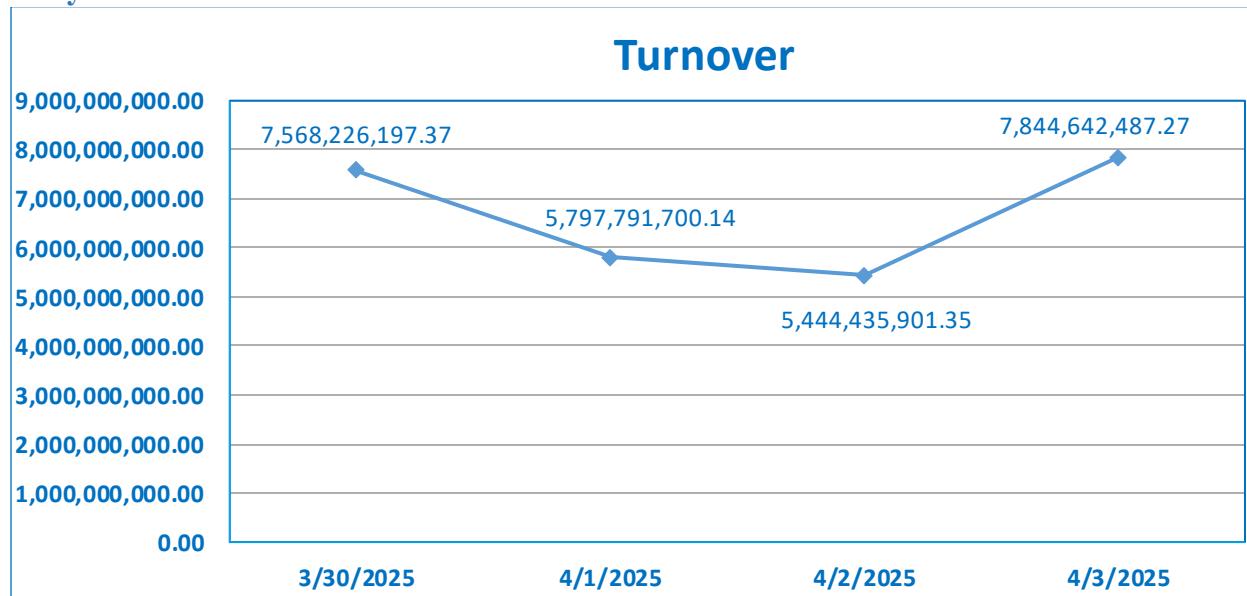


Figure 2: Turnover for NEPSE index.

The turnover for the current week has been displayed above.

Sub-Indices Performance

Indices	28th March	4th April	Return
Trading	4,304.55	4,796.38	11.43%
Investment	106.93	110.24	3.10%
Others	2412.50	2472.47	2.49%
Finance	2,554.36	2,595.80	1.62%
Banking	1,356.27	1,377.43	1.56%
Hydropower	3,470.27	3,504.91	1.00%
Non-Life Insurance	12,253.86	12,342.50	0.72%
Mutual Fund	19.15	19.21	0.31%
Hotels and Tourism	6419.70	6427.50	0.12%
Development Bank	5,500.75	5,500.50	0.00%
Life Insurance	13,448.38	13,420.92	-0.20%
Microfinance	4,880.30	4,846.89	-0.68%
Manufacturing & Processing	7,205.28	7,032.29	-2.40%

Figure 3: Weekly Returns of Sub-indices.

Daily Sector Movement

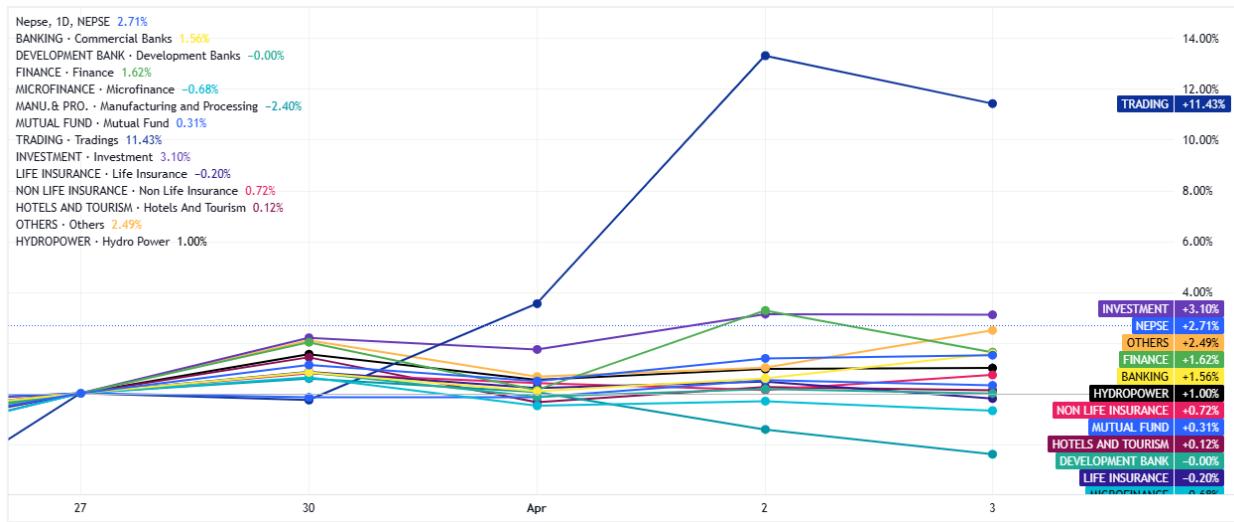


Figure 4: Daily sector movement relative to NEPSE index.

*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.

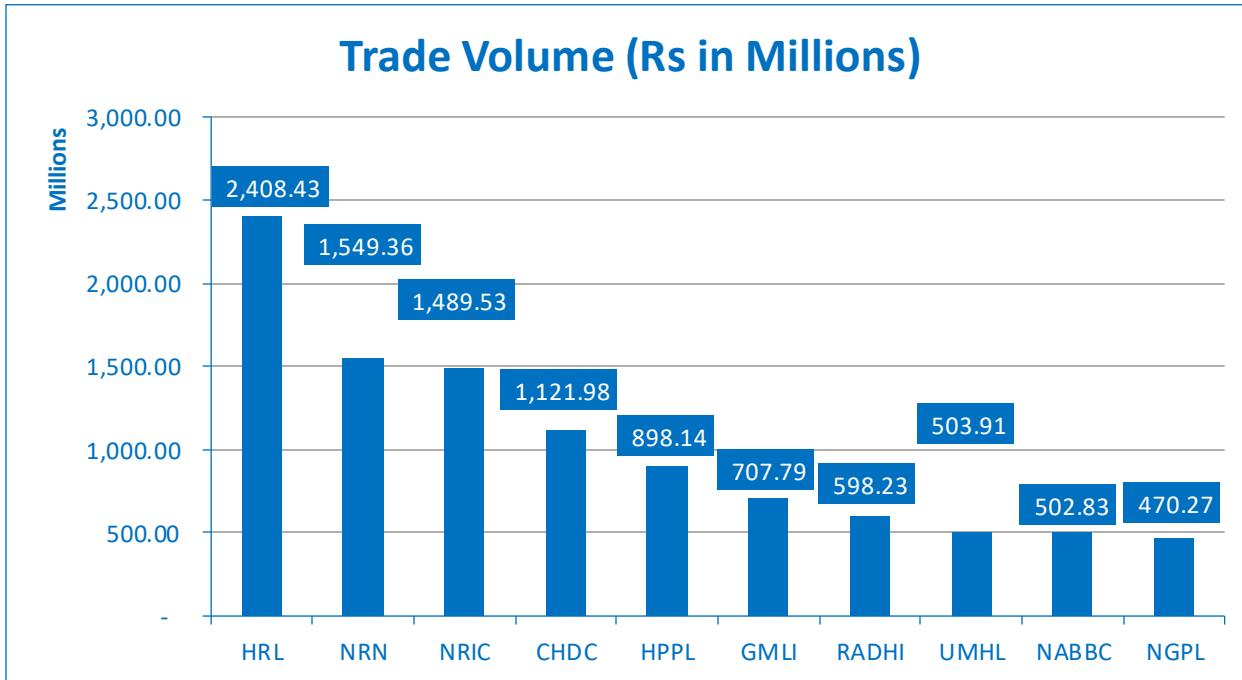


Figure 5: Top 10 Trade volume for the week.

Gainers and Losers

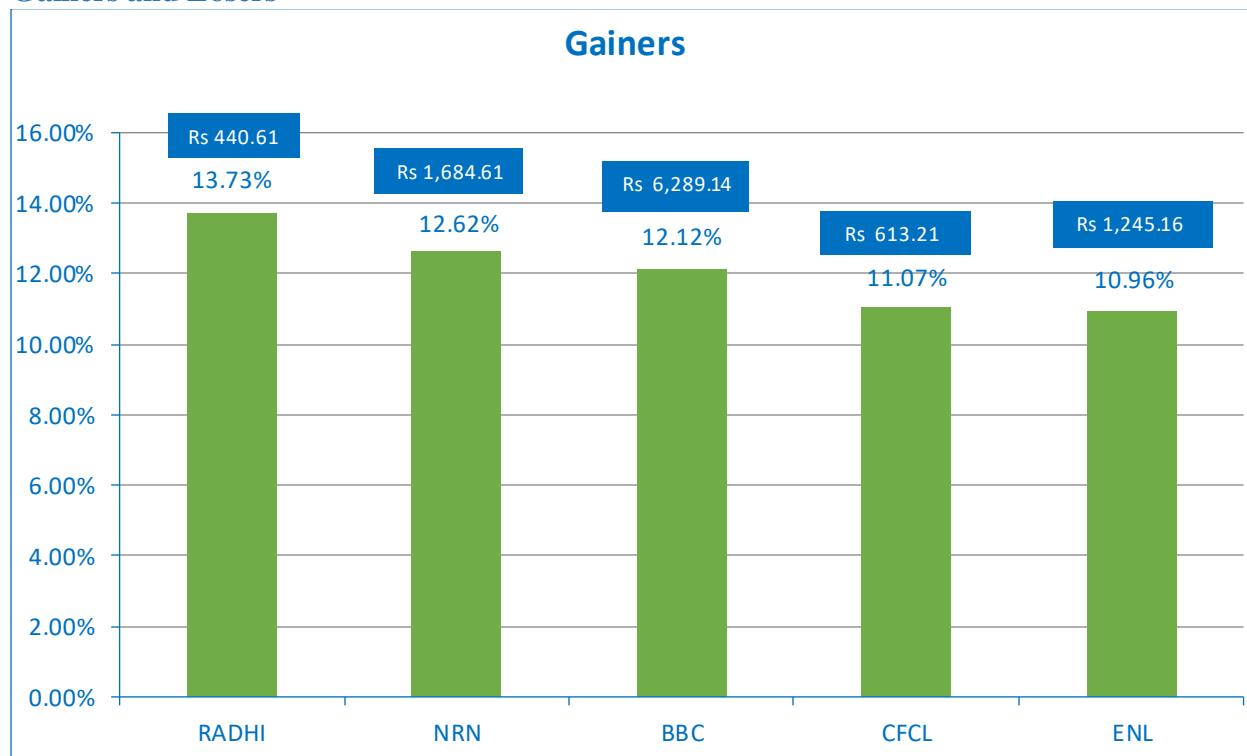


Figure 6: Top 5 Gainers for the week

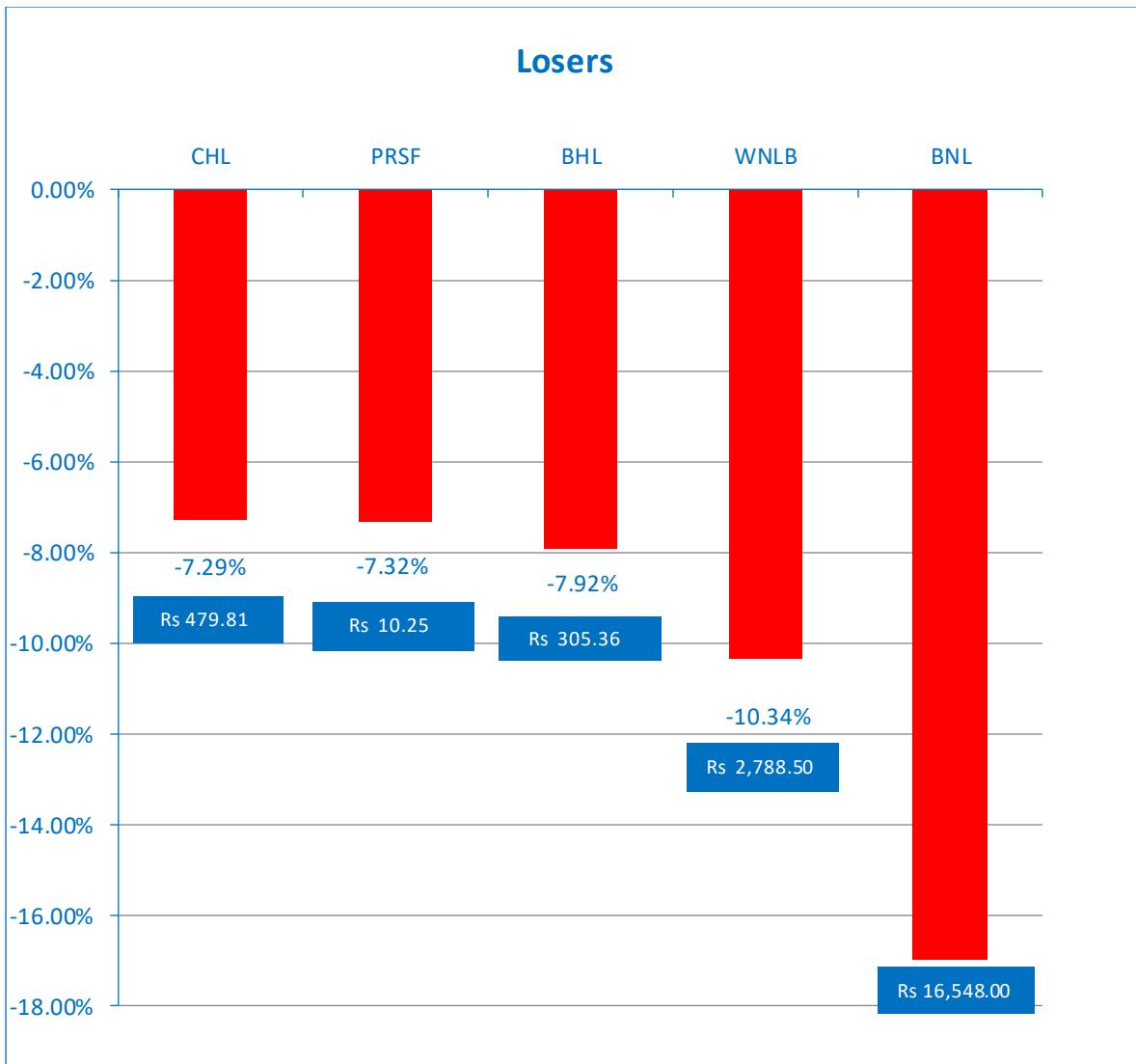


Figure 7: Top 5 Losers for the week

Technical Overview

Overall Trend:

The NEPSE Index (1W chart) closed at 2703.39, rising 40.09 points for the week. The index had experienced sharp, consistent selling from its recent high of 2923, before making a sharp reversal from the 2575 level. In a series of weekly candles, this week's candle confirms the buying strength signaled by last week's hammer pattern. Supported by a bullish RSI divergence, the support area remains strong, keeping the index stable despite the country's political instability. However, the area of rejection at 2760, and the levels above it, remains a key zone to watch.

The MACD did capture the selling pressure, but a consolidation in the upcoming weeks could strengthen the bullish signals in the indicators.



Figure 8: Weekly Time Frame Candlestick Pattern

Daily analysis



Three of the four trading days remained bullish, with the single day of minor selling pressure occurring earlier this week. When zooming into the daily movement in the index, we see that a few companies have experienced significant money flowing into them, indicating that smart money remains confident in the market movement. However, the unpredictability of the political environment poses the greatest threat to the market at the current time.

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

Support	Resistance
Support 1: 2660	Resistance 1: 2800
Support 2: 2600	Resistance 2: 2850
Support 2: 2580	Resistance 3: 2900

Major Rates and Ratios

Description	As on	Rate/Ratio
CD Ratio	March 31, 2025	79.31
Weighted Average Interbank Interest Rate LCY	March 31, 2025	3.00%
Weighted Average 28 days T-bill rate	March 25, 2025	2.9904%
Weighted Average 91 days T-bill rate	April 1, 2025	3.3632%
Weighted Average 182 days T-bill rate	March 18, 2025	2.9857%

Weighted Average 364 days T-bill rate	March 25, 2025	3.0188%
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Average FD Rate for the month of Chaitra, 2081.	
Institutional	Individual
4.52%	6.00%

Upcoming Events

Date	Events
4/6/2025	AGM of Nepal Broadcasting Channel Limited.
4/7/2025	Opening Day of (50,00,000 units @ Rs.1000 per unit) "7% NIC Asia Debenture 2091" of NIC Asia Bank Limited. 10th-22nd AGM of Capital Merchant Banking & Finance Limited.
4/8/2025	Closing day of Auction of 40,000 units of Promoter shares of Saptakoshi Development Bank Limited. Closing Day of 51,292.5 units FPO shares of Wean Nepal Laghubitta Bittiya Sanstha Limited to the general public. Book Closure Date for 8th AGM of Sampada Laghubitta Bittiya Sanstha Limited.
4/9/2025	27th AGM of Raghupati Jute Mills Limited. 12th AGM of Green Development Bank Limited. 11th AGM of United Modi Hydropower Limited.
4/10/2025	Book Closure Date for SGM of Guardian Micro Life Insurance Limited. SGM of Yeti Brewery Limited. Opening Day of 11,95,200 units IPO shares of Pure Energy Limited to the general public. Closing Day of (50,00,000 units @ Rs.1000 per unit) "7% NIC Asia Debenture 2091" of NIC Asia Bank Limited.
4/11/2025	Closing Day of auction of Neco Insurance Limited for 6,00,000 units promoter shares. 43rd AGM of Nepal Oil Corporation Limited.
4/12/2025	AGM of Sabha Pokhari Hydropower Limited

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