

NEPAL LIFE CAPITAL

WEEKLY

MARKET UPDATE

Week: (2025-2-16 to 2025-2-21)



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Market Movement

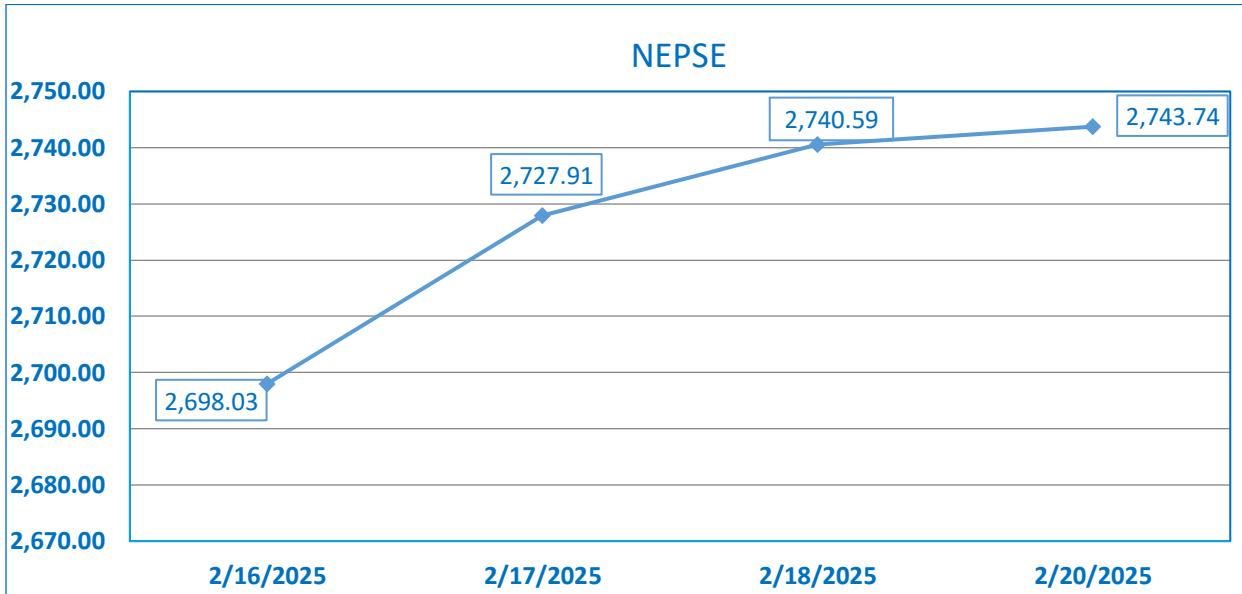


Figure 1: Market Movement for NEPSE index.

For the week of 16th February to 21st February, the NEPSE index traded with an average volume of 9.646Arba gaining 65.27 points (-0.79%) to close at 2743.74.

Daily Turnover

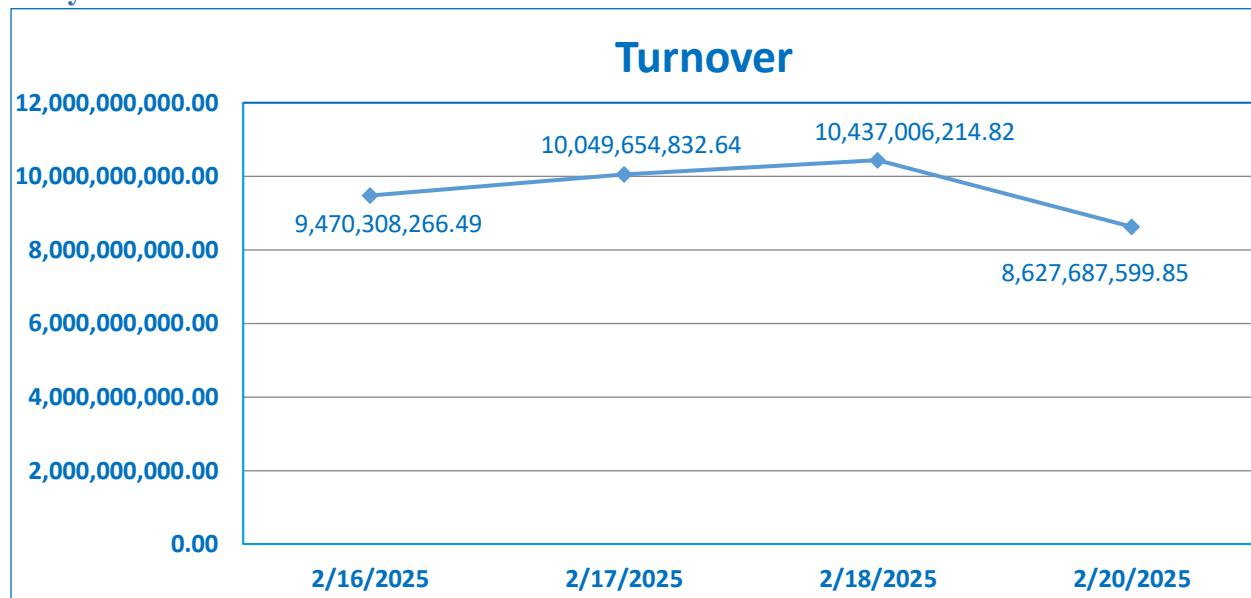


Figure 2: Turnover for NEPSE index.

The turnover for the current week has been displayed above.

Sub-Indices Performance

Indices	14th February	21st February	Return
Others	2088.22	2239.45	7.24%
Life Insurance	13,019.45	13,742.27	5.55%
Microfinance	5,137.45	5,302.90	3.22%
Trading	4,287.55	4,421.98	3.14%
Hotels and Tourism	6614.67	6804.94	2.88%
Banking	1,345.21	1,383.26	2.83%
Finance	2,795.67	2,862.13	2.38%
Investment	107.30	109.73	2.26%
Non-Life Insurance	12,863.96	12,978.96	0.89%
Manufacturing & Processing	6,971.49	6,975.90	0.06%
Mutual Fund	20.19	20.18	-0.05%
Hydropower	3,798.12	3,778.59	-0.51%
Development Bank	5,791.45	5,684.31	-1.85%

Figure 3: Weekly Returns of Sub-indices.

Daily Sector Movement

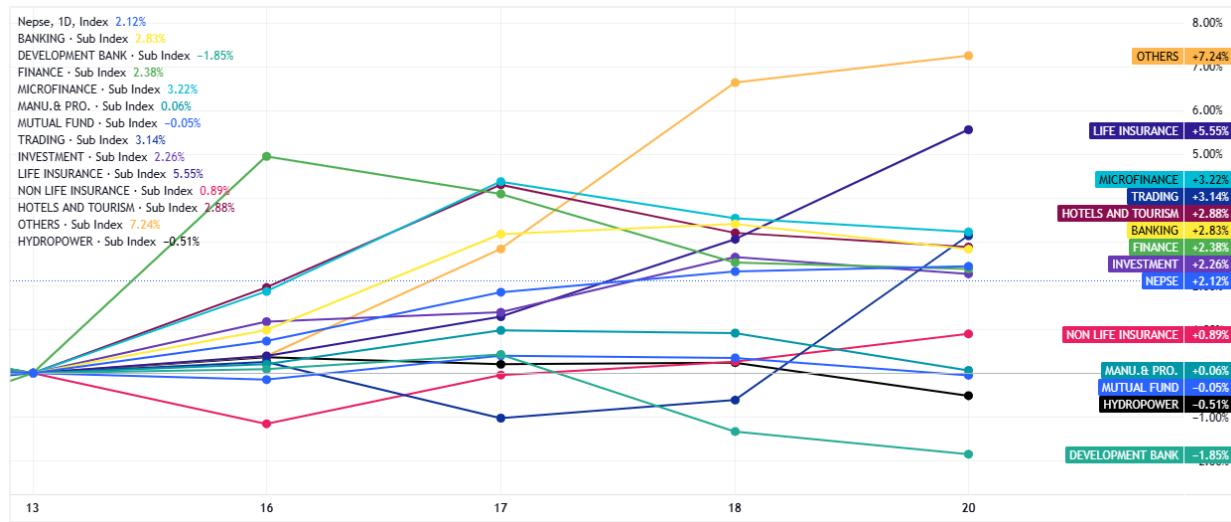


Figure 4: Daily sector movement relative to NEPSE index.

*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.

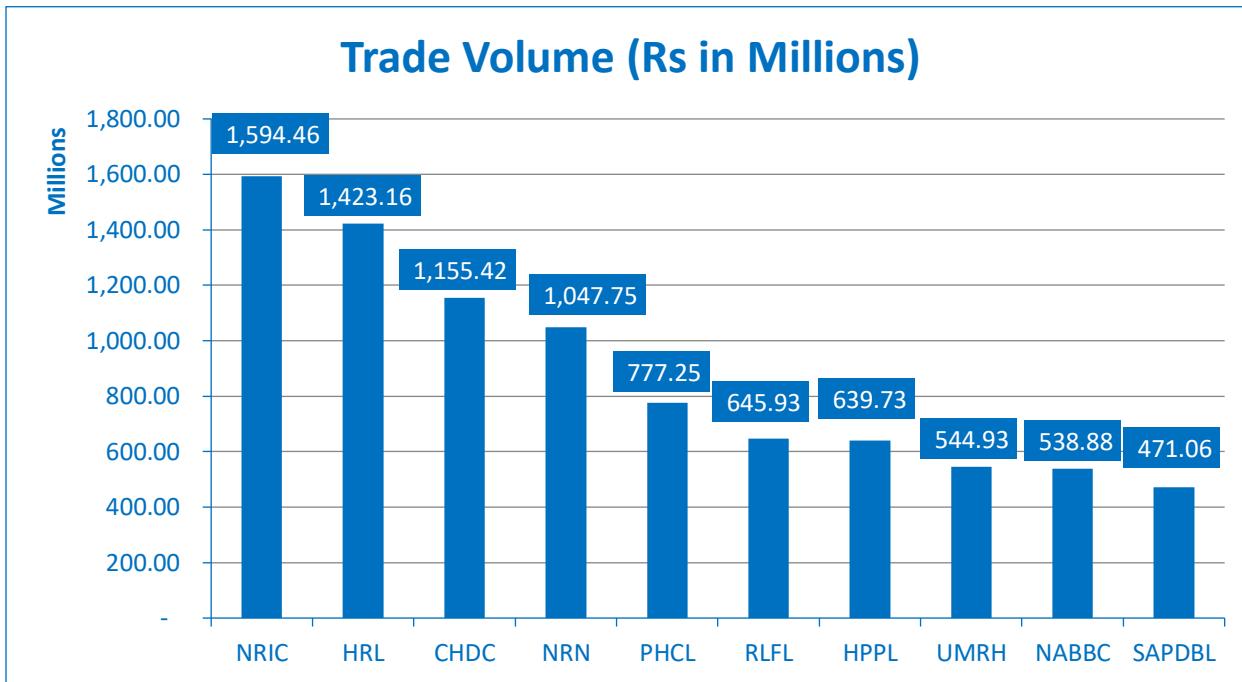


Figure 5: Top 10 Trade volume for the week.

Gainers and Losers

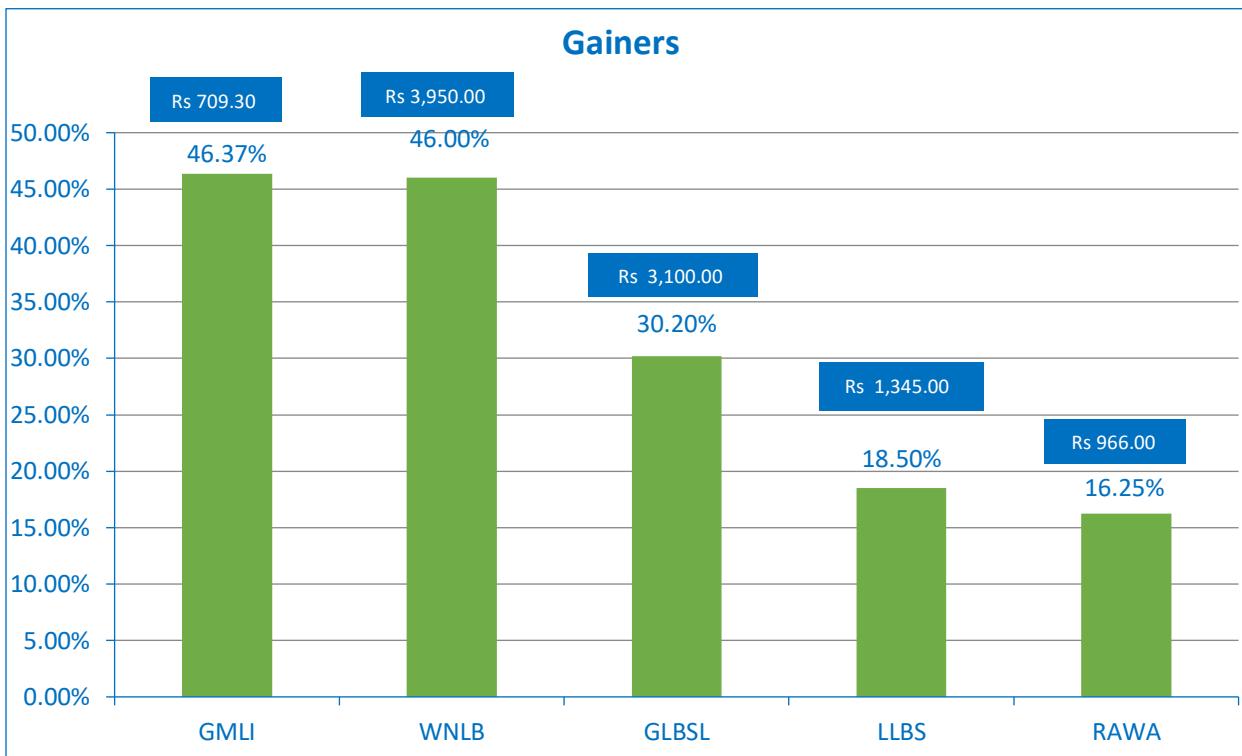


Figure 6: Top 5 Gainers for the week

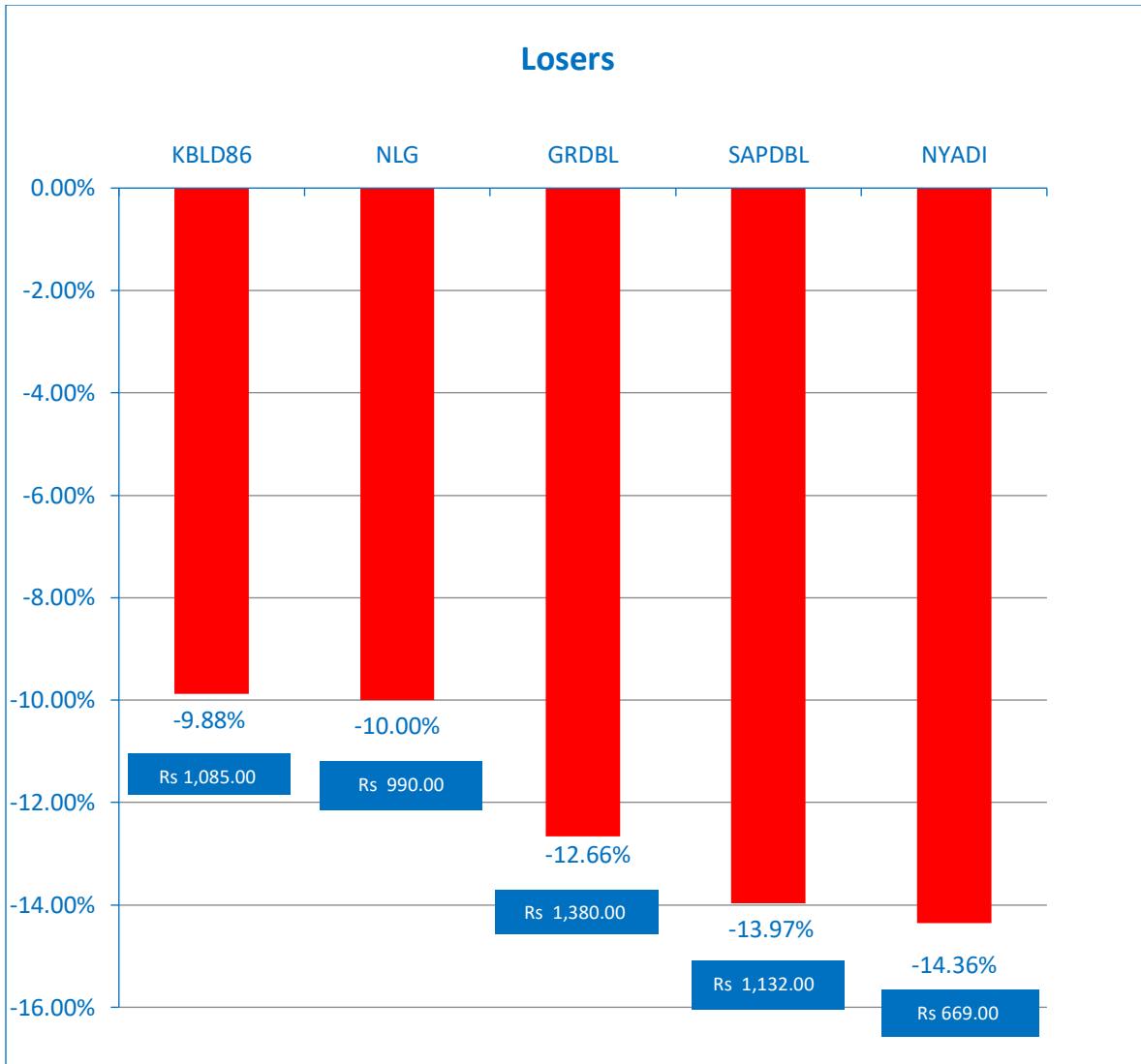


Figure 7: Top 5 Losers for the week

Technical Overview

Weekly analysis - NEPSE Index Weekly Interpretation (Price Action Focused):

The NEPSE index exhibited bullish behavior this week, closing with a significant gain of 2.44%. This positive change is supported by a substantial volume of 38.5858 (Arba), suggesting strong participation and interest in the market. The increased volume reinforces the bullish sentiment, indicating that the price rise is not just a minor fluctuation but rather a more convincing move. The index opened at 2676.92, reached a high of 2757.31, and closed at 2743.74. While the high was slightly above the closing, the fact that the close is near the high point of the week suggests buyers were in control.

Breakout Potential:

Whether the index has a higher chance of a breakout depends on several factors that need further analysis beyond what's immediately visible in the image.

- **Super trend Resistance:** The Super trend indicator currently sits at 2815.31. This acts as a dynamic resistance level. For a sustained bullish breakout, the index would need to convincingly close above this level with strong volume.
- **Resistance Levels:** Identify previous significant highs on the chart. These act as static resistance levels. A breakout above these levels would signal further potential upside.
- **Consolidation:** The chart shows the index has been consolidating within a range. The recent bullish move could be a sign of breaking out of this consolidation. However, we need to see if this move is sustained in the coming weeks.
- **MACD Caution:** While the MACD has shown a bullish crossover, the negative histogram indicates weakening upward momentum. This is a note of caution. If the histogram starts turning positive again, it will strengthen the breakout argument.

Overall:

The NEPSE index shows promising signs of a potential breakout with the strong bullish move and increased volume. However, the Super trend line and other resistance levels still pose challenges. The weakening MACD momentum is a point to watch. A confirmed breakout would require the index to close decisively above the key resistance levels with continued strong volume and a positive MACD histogram.



Figure 8: Weekly Time Frame Candlestick Pattern

Daily analysis



On daily graph,

Overall Uptrend: The chart clearly shows an overall uptrend in the daily prices over the past several days/weeks (including the last four). The price has been making higher highs and higher lows, confirming this trend.

Consolidation/Slight Slowing: While the overall trend is up, the smaller price change on the last day (0.11%) and the lower volume suggest that the upward momentum might be slowing down, or the market might be consolidating. This is a common occurrence after a strong move up.

Approaching Resistance: As mentioned before, the price is nearing a resistance zone around 2800. This could be a factor in the recent slowing of momentum as the market might be pausing to see if it has enough strength to break through that resistance.

Support	Resistance
Support 1: 2660	Resistance 1: 2750
Support 2: 2630	Resistance 2: 2850
	Resistance 3: 3000

Major Rates and Ratios

Description	As on	Rate/Ratio
CD Ratio	February 17, 2025	79.56
Weighted Average Interbank Interest Rate LCY	February 17, 2025	3.00%
Weighted Average 28 days T-bill rate	February 11, 2025	2.9956%
Weighted Average 91 days T-bill rate	February 11, 2025	2.8883%
Weighted Average 182 days T-bill rate	February 18, 2025	2.9767%
Weighted Average 364 days T-bill rate	February 4, 2025	2.9744%

Average FD Rate for the month of Fagun, 2081.

Institutional	Individual
4.52%	6.00%

Upcoming Events

Date	Events
2/23/2025	Book Closure Date for AGM of All Nepal Infrastructure Development Company Limited
	Opening Day of 18,45,000 units IPO shares of Nepal Micro Insurance Company Limited to the general public.
	Closing Day of 100 million units of Rs 10 face value each of "Sanima Flexi Fund".
	17th AGM of Himalayan Life Insurance Limited.
	11th AGM of Samata Gharelu Laghubitta Bittiya Sanstha Limited.

2/24/2025	Closing day of auction of different companies' shares of "Sanimax Equity Fund" Book Closure Date for 27th AGM of IGI Prudential Insurance Limited. 1st AGM of Bizwell Limited.
2/25/2025	Closing day of Auction of 8,45,226 units of Promoter shares of Jeevan Bikas Laghubitta Bittiya Sanstha Limited. 20th AGM of Shikhar Insurance Company Limited.
2/26/2025	No events!
2/27/2025	Book Closure Date for 1:1 ratio right share of Dordi Khola Hydropower Company Limited. Book Closure Date for 8th AGM of IME Life Insurance Company Limited. Book Closure Date for 31st AGM of Himalayan Everest Insurance Limited. Book Closure Date for 14th and 15th AGM of Sindhu Bikash Bank Limited. Closing Day of 18,45,000 units IPO shares of Nepal Micro Insurance Company Limited to the general public. 31st AGM of Siddhartha Premier Insurance Limited. 38th AGM of Nepal Investment Mega Bank.
2/28/2025	31st AGM of Himal Power Limited.
3/1/2025	No events!

..... End.....

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