

NEPAL LIFE CAPITAL

WEEKLY

MARKET UPDATE

Week: (2025-7-20 to 2025-7-25)



NEPAL LIFE
CAPITAL LIMITED
A SUBSIDIARY OF NEPAL LIFE INSURANCE COMPANY LTD.

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Market Movement

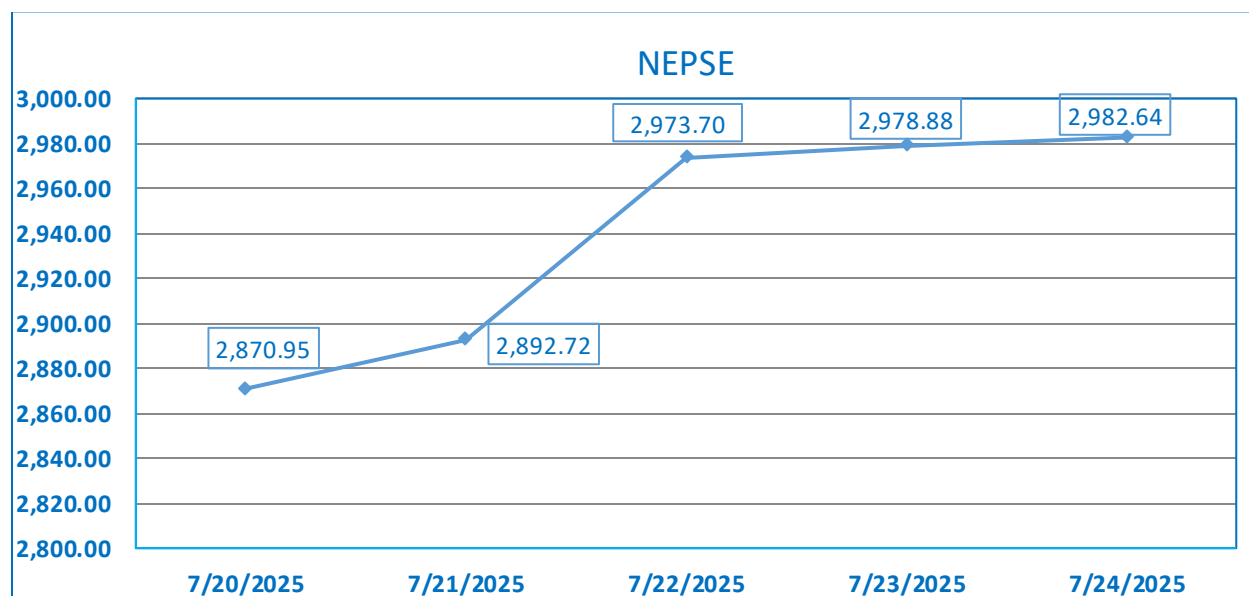


Figure 1: Market Movement for NEPSE index.

For the week of 20th July to 24th July, the NEPSE index traded with an average volume of 19.188 Arba rising 112.01 points (3.90%) to close at 2,982.64.

Daily Turnover

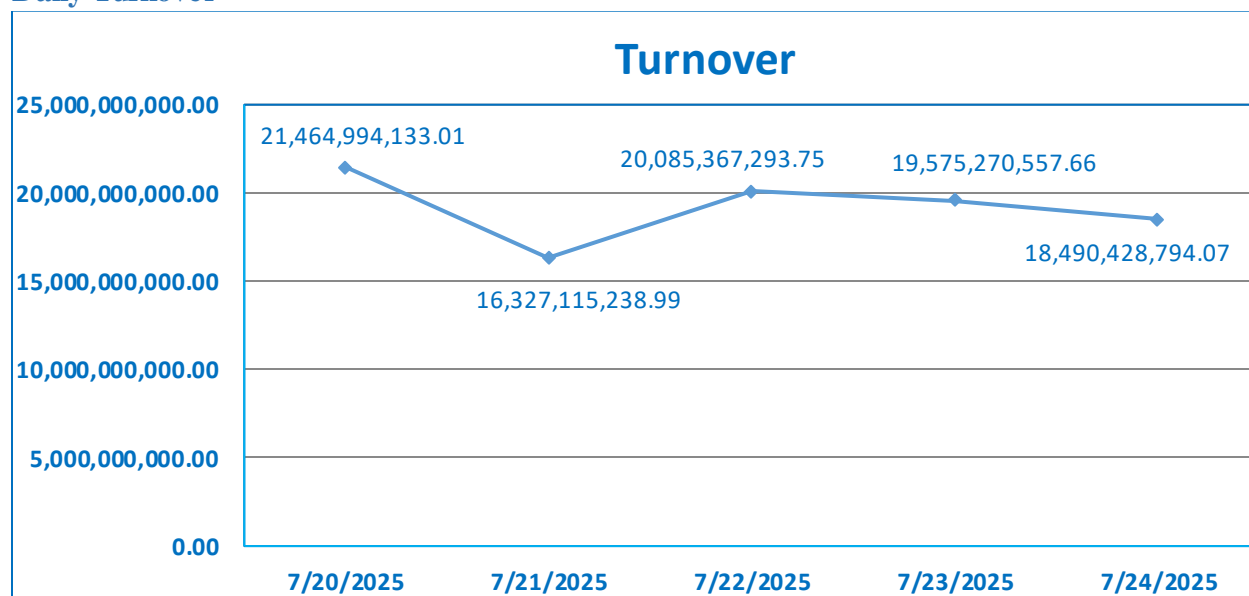


Figure 2: Turnover for NEPSE index.

The turnover for the current week has been displayed above.

Sub-Indices Performance

Indices	18th July	25th July	Return
Others	2472.69	2724.60	10.19%
Life Insurance	13,693.63	14,388.61	5.08%
Microfinance	5,341.03	5,610.06	5.04%
Hydropower	3,757.78	3,941.95	4.90%
Investment	117.02	122.47	4.66%
Hotels and Tourism	7128.97	7440.95	4.38%
Non-Life Insurance	13,014.95	13,542.65	4.05%
Development Bank	6,057.87	6,286.02	3.77%
Manufacturing & Processing	7,572.15	7,849.13	3.66%
Finance	2,643.20	2,698.42	2.09%
Trading	4,221.40	4,286.43	1.54%
Mutual Fund	20.26	20.55	1.43%
Banking	1,543.33	1,547.96	0.30%

Figure 3: Weekly Returns of Sub-indices.

Daily Sector Movement

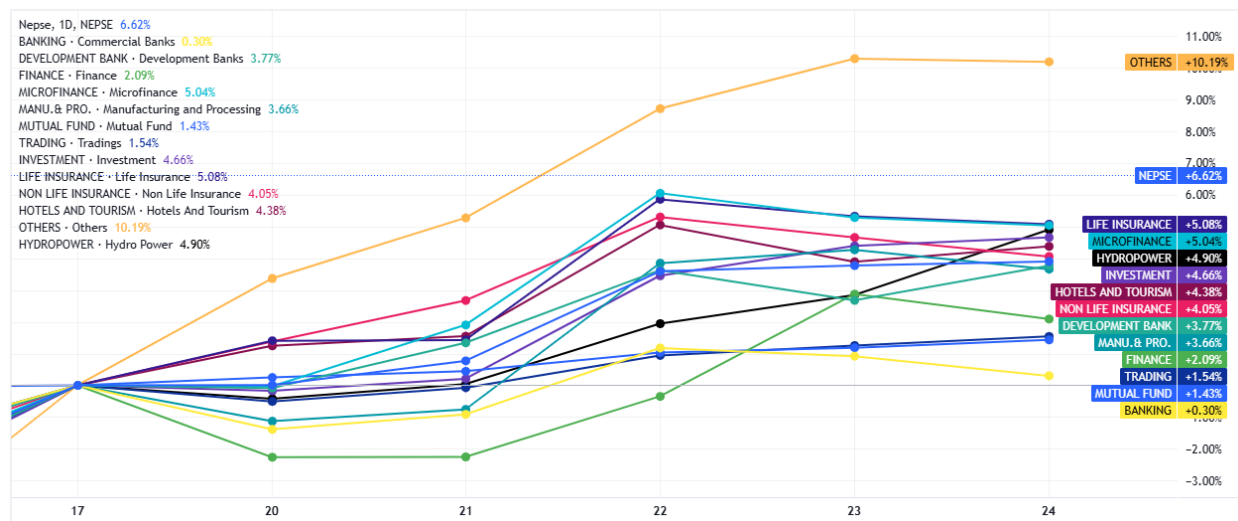


Figure 4: Daily sector movement relative to NEPSE index.

*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.

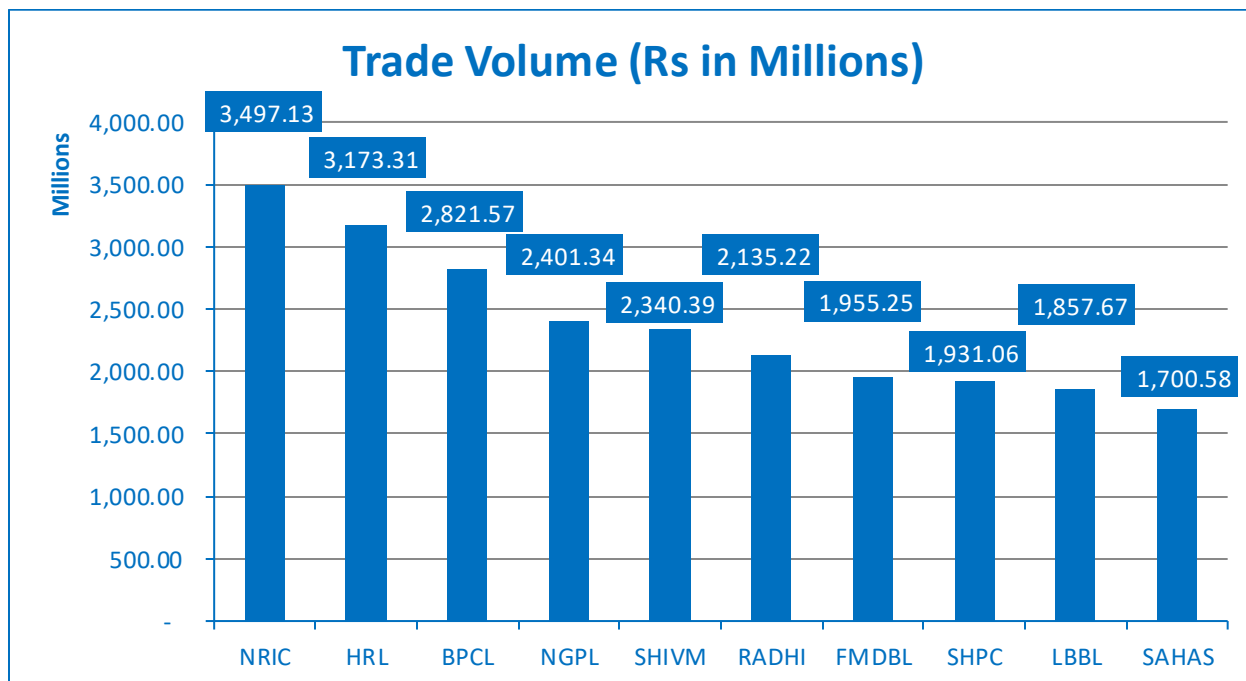


Figure 5: Top 10 Trade volume for the week.

Gainers and Losers

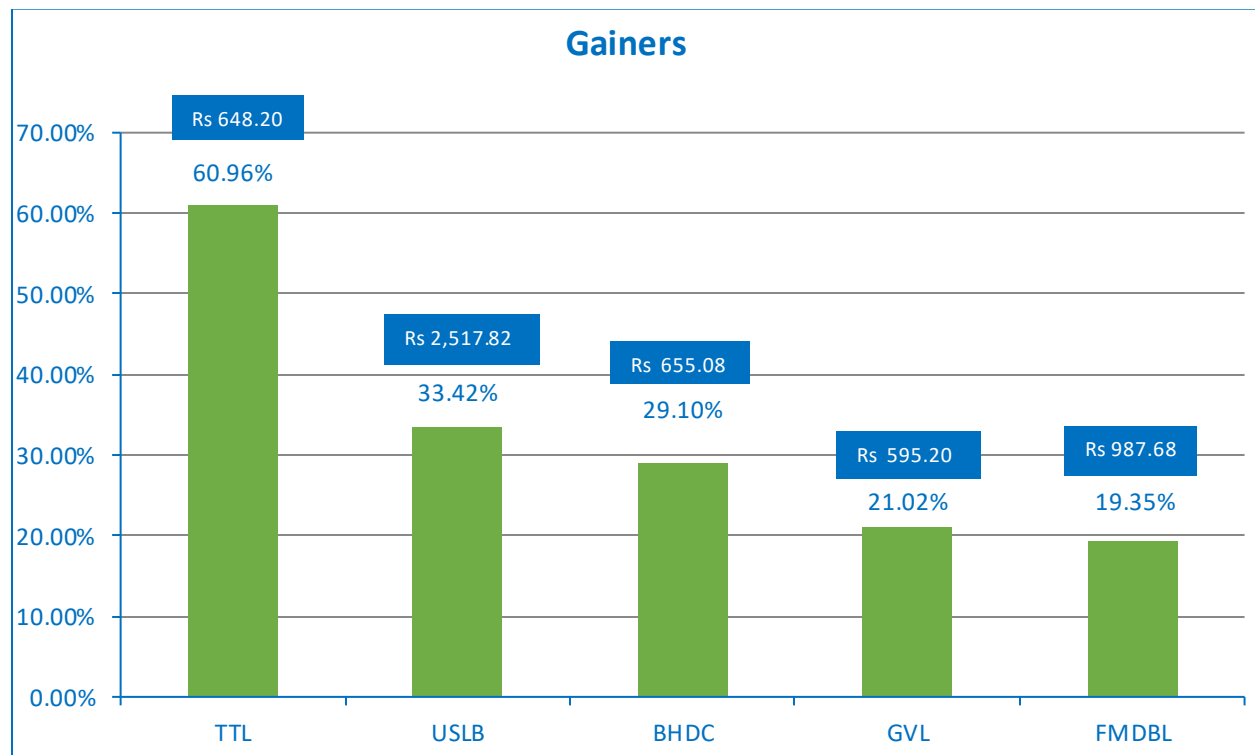


Figure 6: Top 5 Gainers for the week

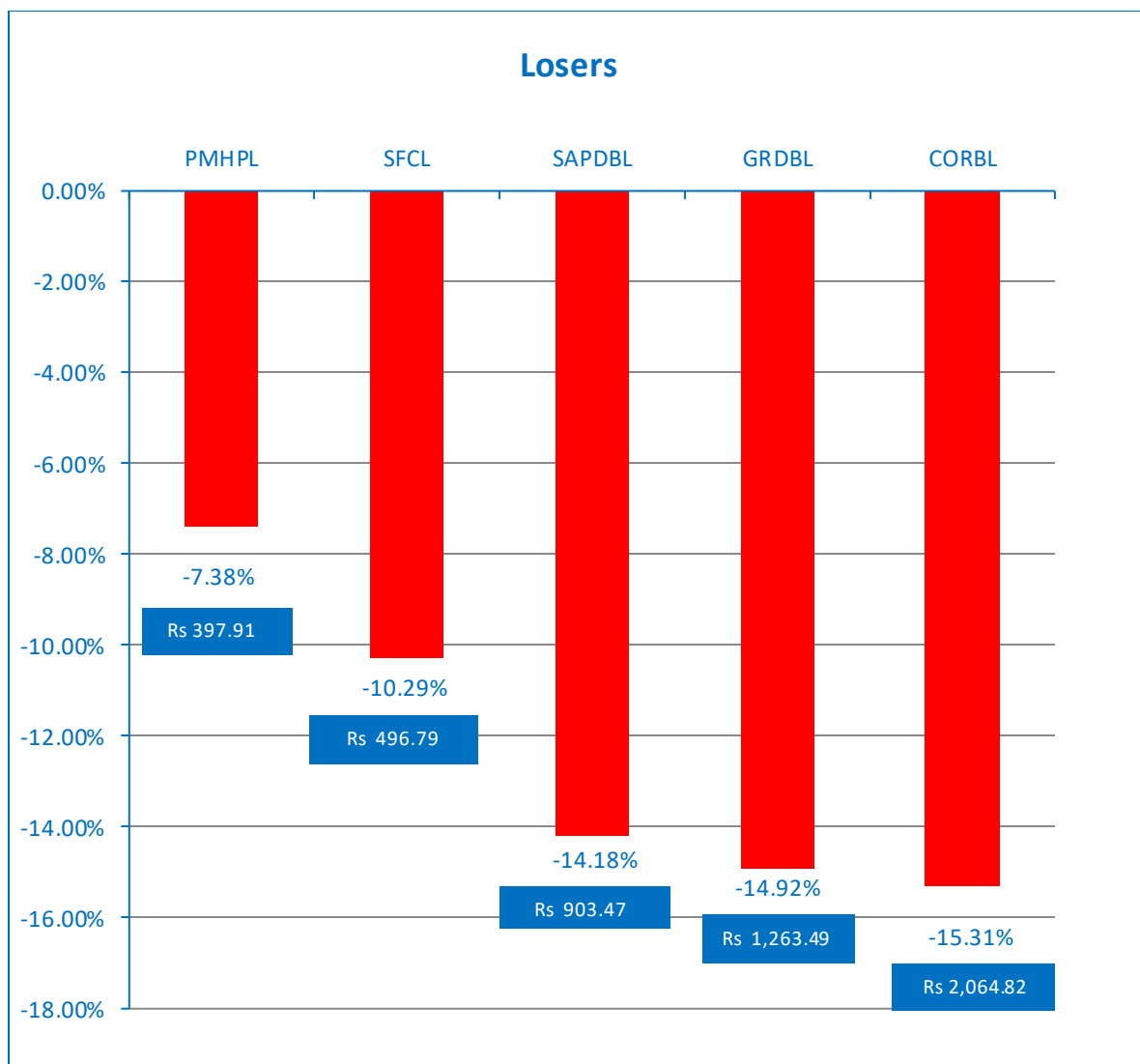


Figure 7: Top 5 Losers for the week

Technical Overview

Last week:

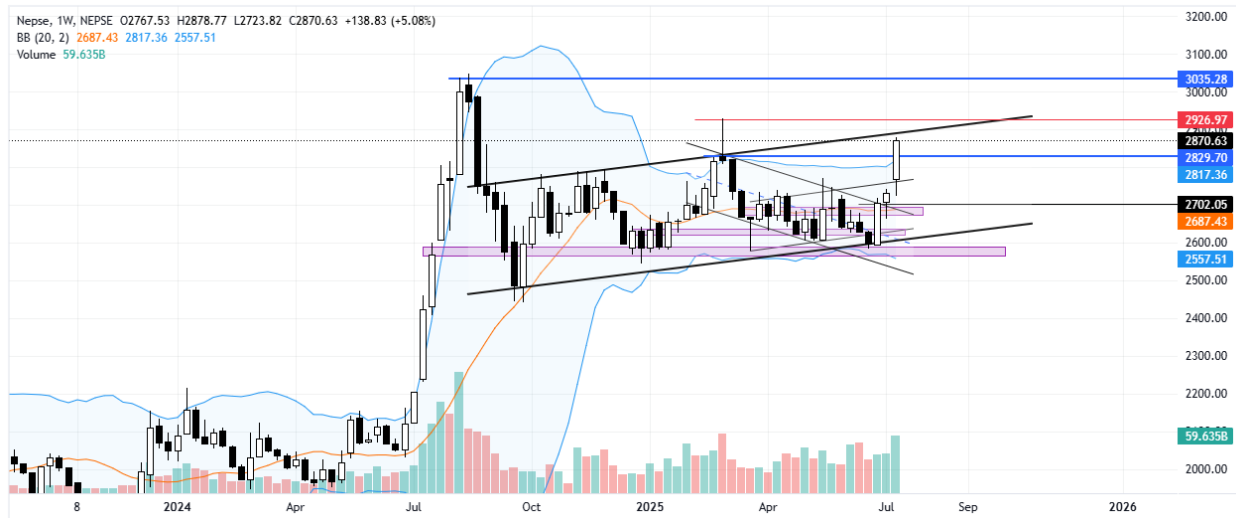


Figure 8: Weekly Time Frame Candlestick Pattern

This week:

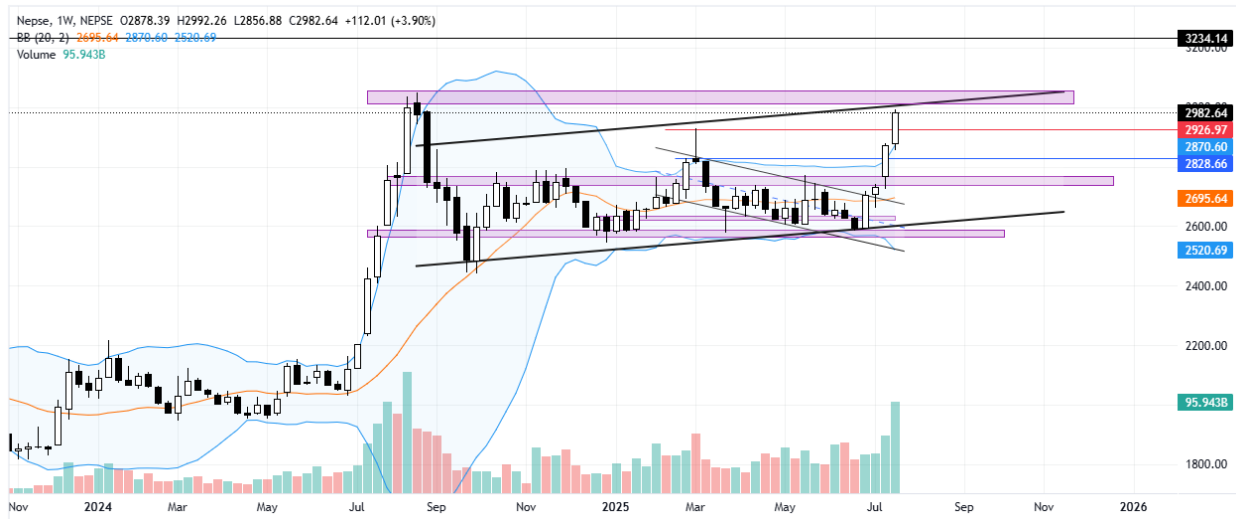


Figure 9: Weekly NEPSE chart

Remarks:

Another strong break out! The volume has reached a major high, 19 arba on average weekly volume is phenomenal. The index broke through another major resistance this time 2926 got penetrated. Like earlier the market does seem really strong but every resistance and every trading day decides the next direction for the market. 3000 – 3060 has been the tallest resistance the market could once again show some signs of rejection as people will most definitely decrease their exposure to the market at this point.

Daily analysis:

Last week:



This week:



Figure 10: Daily NEPSE chart

On a daily timeframe,

The index keeps on moving forward, now it tests the major resistances above the 3000 mark. All eyes on the index. With a larger trading volume comes larger volatility. This week the market sustained at a peak. It does suggest buying volume still present in the market.

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

Support	Resistance
Support 1: 2920	Resistance 1: 3000
Support 2: 2840	Resistance 2: 3030
Support 2: 2770	Resistance 3: 3060

Major Rates and Ratios

Description	As on	Rate/Ratio
CD Ratio	July 21, 2025	75.76
Weighted Average Interbank Interest Rate LCY	July 21, 2025	2.75%
Weighted Average 28 days T-bill rate	July 15, 2025	2.7736%
Weighted Average 91 days T-bill rate	July 22, 2025	2.6539%
Weighted Average 182 days T-bill rate	July 8, 2025	2.9577%
Weighted Average 364 days T-bill rate	July 8, 2025	2.9975%

Average FD Rate for the month of Ashar, 2081.	
Institutional	Individual
4.37%	5.98%%

Upcoming Events

Date	Events
7/27/2025	Closing Day of 2,07,500 units of Bungal Hydro Limited to the Foreign Nepalese Immigrants.
	Closing Day of 8,30,000 units of Bungal Hydro Limited to the project-affected locals of Bajhang District.
	Closing Day of ratio 1:0.50 Right Share of People's Power Limited.
	Closing Day of ratio 1:1 Right Share of Terhathum Power Company Limited.
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7/28/2025	No event!
7/29/2025	Opening day of Auction of 7,04,111 units of Ordinary Right Shares of Rapti Hydro & General Construction Limited. Closing Day of ratio 1:0.42 Right Share of Asian Life Insurance Company Limited.
7/30/2025	Opening day of Auction of 2,98,832 units of Ordinary Right Shares of Chhyangdi Hydropower Company Limited. Opening Day of 57,029 units of Jhapa Energy Limited to the Foreign Nepalese Immigrants. Opening Day of 3,80,190 units of Jhapa Energy Limited to the project-affected locals of Jhapa District. Book Closure Date for SGM of Bhugol Energy Development Company Limited. Book Closure Date for SGM of Dolti Power Company Limited.
7/31/2025	Opening Day of 24,23,185 units IPO shares of Daramkhola Hydro Energy Limited to the general public. Opening Day of ratio 1:0.65 Right Share of Joshi Hydropower Development Company Limited.
8/1/2025	Book Closure Date for 1:1 ratio right share of Shiva Shree Hydropower Limited.
8/2/2025	SGM of Unnati Sahakarya Laghubitta Bittiya Sanstha Limited.

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