CAPITAL TRUST SECURITIES

DAILY MARKET WATCH

23rd November 2026

Monday

COLOMBO STOCK EXCHANGE — CLOSE OF TRADE

ALL SHARE PRICE INDEX

21,242.52

▼ -127.20 : -0.60% | ASPI YTD: -6.11% | SL20 YTD: -1.67%

The index slips 0.60% to start the week as Dialog Axiata and Carson Cumberbatch weigh

S&P SL20	TURNOVER, LKR MN	MARKET CAP., LKR BN
6,054.76	1,054.89	7,661.97
-0.34%	-54.7% d/d	-0.66%

00 MARKET COMMENTARY

MONDAY CLOSE OF TRADE

The All Share Price Index slipped **0.60%** to **21,242.52** to start the week. The S&P SL20 fell 0.34% to 6,054.76 and is 1.67% down on the year.

The ASPI is 5.46% up on the month and 6.11% down on the year, and the RSI eased to 53.01. **Declines led.** 152 securities closed lower against 63 that closed higher. The market's top contributors carried here are a net -34.59 points, leaving **~92.61** to everything else: the fall was broad.

Dialog Axiata's fall of 0.50 to 47.50 took 16.19 points; Carson Cumberbatch took 10.84 on a fall of 14.25 to 680.00, on just 102 shares, and Hayleys 8.03. Dilmah Ceylon Tea Company gave back Friday's rise, falling 10.4% to 1,407.75 on 192 shares. Digital Mobility Solutions Lanka added 8.33 on a rise of 9.00 to 185.00, the largest positive contributor of the day.

Turnover fell 55% to LKR 1,054.89 Mn, 69% below the year-to-date daily average. Bairaha Farms led with LKR 147.09 Mn, 13.9% of the day, and rose 1.7% to 85.40; Digital Mobility Solutions Lanka followed with 10.5%. Ceylon Tobacco Company went ex-dividend (LKR 41.00) and closed 23.50 lower at 1,821.00.

Foreigners turned net buyers after three days of selling, of LKR 29.94 Mn. Access Engineering was the largest net buy at LKR 20.50 Mn, after disclosing three expressway contracts worth LKR 68.00 Bn on Friday; Dialog Axiata was the largest net sale at LKR 29.01 Mn.

01 MARKET BENCHMARK

INDEX LEVEL, LAST FIVE SESSIONS



Rebased to Tuesday 17 November. The index is 2.11% below that close.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net **-127.20 points**. The eight shown are a net -34.59, so everything else together took **~92.61**. Dialog Axiata took **~16.19**, the largest contribution either way.

03 MARKET BREADTH

24/7 TRADED

63 up	securities, up against down	152 down
63		152

257 traded companies — Gains to declines **0.41**

63 and 152 count **securities**; 267 counts **companies**, so they do not sum. Gains to declines was **0.41**, from 0.36 on Friday.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

NET BUYS	61.91	NET SELLS	31.97
LARGEST NET BUYS		LARGEST NET SELLS	
Access Engineering	20.50	Dialog Axiata	29.01
Digital Mobility Solutions Lanka	8.93	Amana Bank	1.26
Hayleys	8.27	Haycarb	0.75
Ambeon Capital	5.53	The Lanka Hospitals Corporation	0.33
Sampath Bank	3.89	Kelani Cables	0.32

NET INFLOW

+29.94

Net sells by stock came to **LKR 31.97 Mn** against net buys of 61.91 Mn, a net inflow of LKR 29.94 Mn. Dialog Axiata was the largest net sale at **LKR 29.01 Mn**.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS	%	LOSERS	%
TESS	+11.8	CTEA	-10.4
LPL-X	+7.3	KGAL	-6.9
PHAR	+6.0	COLO	-6.4
LPL	+5.9	CITW	-6.3
PKME	+5.1	HNBF-X	-5.8

Tess Agro rose **11.8%** to **1.90**. The largest fall was Dilmah Ceylon Tea Company, **10.4%** to **1,407.75**. 152 securities fell against 63.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



Bairaha Farms took 13.9% of the day across 60 trades. Digital Mobility Solutions Lanka followed with 10.5%.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	23.11	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 20.11			
All Share Price Index	21,242.52	21,369.72	-0.60%
S&P Sri Lanka 20	6,054.76	6,075.28	-0.34%
Market cap, LKR Bn	7,661.97	7,712.53	-0.66%
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR Mn	1,054.89	3,441.61	-69.35%
Share volume, Mn	46.55	131.96	-64.72%
Trades	14,906	26,009	-42.69%
TODAY			
Foreign net buys by stock, LKR Mn	61.91	–	–
Foreign net sells by stock, LKR Mn	31.97	–	–
Net foreign flow, LKR Mn	+29.94	–	–
Traded companies	267	–	–

08 MOMENTUM AND RATES

NEUTRAL



PRIME LENDING RATE	POLICY RATE
10.93%	8.75%
AWPR, week to 21 Oct · CBSL	OPR, held 30 Sep · CBSL
TREASURY BILL	INFLATION
91-day, 6 Nov auction · PDMD	8.00%
MARKET P/E	PRICE TO BOOK
10.94x	1.27x
trailing · LSE	market · LSE

CCPI inflation per year, September · CBSL

09 CORPORATE DISCLOSURES

AS FILED WITH THE CSE

Access Engineering — LKR 68.00 Bn

Received letters of acceptance dated 19 Nov from the Road Development Authority for three expressway contracts worth LKR 68.00 Bn excluding VAT: Central Expressway Section 4 Package 1J (LKR 22.39 Bn) and Ruwanpura Expressway Phase 1 Packages 1E (LKR 27.99 Bn) and 1G (LKR 17.62 Bn).
FILED 20 NOV

Paragon Ceylon — 60.24%

EDNA Holdings (Private) Limited bought 602,555 shares, 60.24% of the company, at LKR 155.00 a share on 20 Nov; LKR 93.40 Mn in all. CT Holdings sold its 22.08%.
FILED 20 NOV

Sierra Cables — 6.33%

Iconic Trust (Private) Limited sold 34.00 Mn shares, 6.33% of the company, on 17 Nov at an average LKR 36.03; LKR 1.23 Bn in all. It keeps 24.11%, and the public holding rose to 49.72%.
FILED 20 NOV

10 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

CODE	COMPANY	EX-DIV	PAYMENT	TO EX-DIV	LKR/SHARE
CARG	Cargills (Ceylon)	17 Nov	7 Dec	−6d	2.00
COMD	Commercial Development Company	17 Nov	7 Dec	−6d	4.00
EBCR	E B Creasy & Company	17 Nov	7 Dec	−6d	0.50
CTHR	C T Holdings	18 Nov	8 Dec	−5d	6.00
ASIY	Asia Siyaka Commodities	19 Nov	9 Dec	−4d	0.23
GRAN	Ceylon Grain Elevators	19 Nov	9 Dec	−4d	10.00
TAFL	Three Acre Farms	19 Nov	9 Dec	−4d	35.00
DIAL	Dialog Axiata	20 Nov	10 Dec	−3d	0.70
CTC	Ceylon Tobacco Company	23 Nov	11 Dec	0d	41.00
SLTL	Sri Lanka Telecom	25 Nov	14 Dec	2d	0.50

Days are counted to the ex-dividend date; rows already ex are listed by payment date. Amounts are LKR per share.

11 SECTOR STATISTICS

TURNOVER

INDUSTRY GROUP	TURNOVER	SHARE
BY TURNOVER TODAY, LKR MN		
Food beverage & tobacco	248.25	23.5%
Capital goods	161.79	15.3%
Diversified financials	129.67	12.3%
Banks	128.89	12.2%
Transportation	112.46	10.7%
Materials	102.94	9.8%
Telecommunications	41.85	4.0%
Insurance	29.05	2.8%

Food beverage & tobacco took 23.5% of the day's turnover, and capital goods 15.3%.

CAPITAL TRUST SECURITIES

42, Sir Mohammmed Macan Markar Mawatha, Colombo 03

0705 666 777

inquiries@capitaltrust.lk

Scan the QR Code now to receive updates

Capital Trust Securities · CapitalTrustRe · Capital Trust Securities · Capital Trust Securities · Capital Trust Securities · Capital Trust Securities

For information only. This document is not an offer to buy or sell any security and does not constitute investment advice. Source: Colombo Stock Exchange, Central Bank of Sri Lanka.