CAPITAL TRUST SECURITIES

DAILY MARKET WATCH

25th November 2026

Wednesday

COLOMBO STOCK EXCHANGE — CLOSE OF TRADE

ALL SHARE PRICE INDEX

21,315.83

▲ +73.31 - 0.35% | ASPI YTD +5.78% | SL20 YTD +1.54%

The index rises 0.35% as Distilleries Company of Sri Lanka and PQP Glass Ceylon lead

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
6,062.83	1,453.12	7,693.67
+0.29%	+37.8% d/d	+0.59%

00 MARKET COMMENTARY

WEDNESDAY · CLOSE OF TRADE

The All Share Price Index rose **0.35%** to **21,315.83** after Tuesday's market holiday. The S&P SL20 rose 0.28% to 6,062.83 and is 1.54% down on the year.

The ASPI is 0.25% lower on the week, 5.83% up on the month and 5.78% down on the year, and the RSI rose to 54.43. **Gains led.** 121 securities closed higher against 85 that closed lower. The eight contributors carried here are a net +32.83 points, leaving **+40.48** to everything else.

Distilleries Company of Sri Lanka's rise of 1.00 to 59.00 added 17.51 points, PQP Glass Ceylon 16.91 on a rise of 7.3% to 62.10, and L O L C Holdings B.02. Access Engineering added 7.44 as it rose 3.0% to 84.50. Hatton National Bank took 10.62 on a fall of 3.00 to 391.50, and S M B Finance 5.03 on a fall of 0.10 to 0.90.

Turnover rose 38% to LKR 1,453.12 Mn, 58% below the year-to-date daily average. Crossings made up 24.8% of the day, led by three in Housing Development Finance Corporation Bank of SL: 3.30 Mn shares, about 5.1% of the bank, at LKR 67.00, worth LKR 221.10 Mn. Sri Lanka Telecom went ex-dividend (LKR 0.50) and closed 0.10 higher at 90.20.

Foreigners turned net sellers, of LKR 138.43 Mn. Dialog Axiata was the largest net sale at LKR 125.49 Mn, nearly nine tenths of its LKR 140.24 Mn turnover; Digital Mobility Solutions Lanka was the largest net buy at LKR 38.24 Mn.

01 MARKET BENCHMARK

INDEX LEVEL, LAST FIVE SESSIONS



Rebased to Wednesday 18 November. The index is 0.41% below that close.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net +73.31 points. The eight shown are a net +32.83, so everything else together took **+40.48**. Distilleries Company of Sri Lanka took **+17.51**, the largest contribution either way.

03 MARKET BREADTH

271 TRADED

121 up	securities, up against down	85 down
121		85
271 traded companies		Gains to declines **1.42**

121 and 85 count **securities**; 271 counts **companies**, so they do not sum. Gains to declines was **1.42**, from 0.41 on Monday.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

NET BUYS	74.01	NET SELLS	212.44
LARGEST NET BUYS		LARGEST NET SELLS	
Digital Mobility Solutions Lanka	38.24	Dialog Axiata	125.49
DFCC Bank	13.10	Amana Bank	24.44
Sampath Bank	4.54	The Lanka Hospitals Corporation	16.78
Hayleys	3.79	Harischandra Mills	16.50
Ceylon Grain Elevators	3.06	Aitken Spence	11.55

NET OUTFLOW **−138.43**

Net sells by stock came to **LKR 212.44 Mn** against net buys of 74.01 Mn, a net outflow of LKR 138.43 Mn. Dialog Axiata was the largest net sale at **LKR 125.49 Mn**.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS	%	LOSERS	%
SING	+25.0	SEMB	−10.0
RCH	+8.6	LGL.X	−9.6
MULL	+7.9	MRH	−6.9
GLAS	+7.3	AFSL	−6.9
TESS.X	+7.1	AHPL	−5.5

Standard Capital rose **25.0% to 90.60**. The largest fall was S M B Finance, **10.0% to 0.90**. 121 securities rose against 85.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 1,453.12 MN TURNOVER			100%
HOUSING DEVELOPMENT FINANCE CORPORATION BANK OF SL		281.98	19.4%
DIALOG AXIATA		140.24	9.7%
DIGITAL MOBILITY SOLUTIONS LANKA		89.42	6.2%
LB FINANCE		51.67	3.6%
COMMERCIAL BANK OF CEYLON		46.07	3.2%
Rest of market		843.74	58.1%

1,453.12 — MONDAY 1,054.89 +37.8% — YTD DAILY AVG 3,433

Housing Development Finance Corporation Bank of SL took 19.4% of the day, most of it in three crossings at LKR 67.00. Dialog Axiata followed with 9.7%.

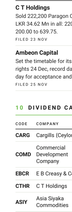
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	25.11	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 23.11			
All Share Price Index	21,315.83	21,242.52	+0.35%
S&P Sri Lanka 20	6,062.83	6,046.17	+0.28%
Market cap, LKR Bn	7,693.67	7,664.22	+0.38%
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR Mn	1,453.12	3,432.58	−57.67%
Share volume, Mn	53.91	131.60	−59.03%
Trades	14,926	25,959	−42.50%
TODAY			
Foreign net buys by stock, LKR Mn	74.01	–	
Foreign net sells by stock, LKR Mn	212.44	–	
Net foreign flow, LKR Mn	−138.43	–	
Traded companies	271	–	

08 MOMENTUM AND RATES

NEUTRAL



PRIME LENDING RATE	POLICY RATE
10.93%	8.75%
AWPR, week to 21 Oct · CBSL	OPR, held 20 Sep · CBSL
TREASURY BILL	INFLATION
9.95%	8.00%
364-day, 9-Nov auction · PDMD	CCPI year-on-year, September · CBSL
MARKET P/E	PRICE TO BOOK
10.99x	1.27x
trailing · CSE	market · CSE

09 CORPORATE DISCLOSURES

AS FILED WITH THE CSE

C T Holdings — **22.21%**

Sold 222,200 Paragon Ceylon shares, 22.21% of the company, on 20 Nov for LKR 34.62 Mn in all: 220,865 at LKR 155.00 and the rest in small lots at LKR 150.00 to 639.75.
FILED 23 NOV

Amboon Capital — **XR 24 Dec**

Set the timetable for its rights issue and private placement: EGM 22 Dec, ex-rights 24 Dec, record date 28 Dec, rights trading from 11 Jan 2027, and last day for acceptance and payment 25 Jan 2027.
FILED 25 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	−8d	7.00
COMD	Commercial Development Company	17 Nov	7 Dec	−8d	4.00
EBCR	E B Creasy & Company	17 Nov	7 Dec	−8d	0.50
CTHR	C T Holdings	18 Nov	8 Dec	−7d	6.00
ASIY	Asia Siyaka Commodities	19 Nov	9 Dec	−6d	0.23
GRAN	Ceylon Grain Elevators	19 Nov	9 Dec	−6d	10.00
TAFL	Three Acre Farms	19 Nov	9 Dec	−6d	35.00
DIAL	Dialog Axiata	20 Nov	10 Dec	−5d	0.70
CTC	Ceylon Tobacco Company	23 Nov	11 Dec	−2d	41.00
SLTL	Sri Lanka Telecom	25 Nov	14 Dec	0d	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		
Banks	541.05	37.2%
Materials	151.09	10.4%
Telecommunications	142.74	9.8%
Capital goods	141.46	9.7%
Diversified financials	114.44	7.9%
Transportation	92.08	6.3%
Food beverage & tobacco	91.65	6.3%
Insurance	45.67	3.1%

Banks took 37.2% of the day's turnover, and materials 10.4%.

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