

DAILY MARKET WATCH

02nd October 2026

Friday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,812.64

▼ -68.26 · 0.33%

ASPI YTD -8.00%

SL20 YTD -4.45%

Yesterday's gain handed straight back, **and the month is flat before it starts**, on the thinnest open-market turnover of the week.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,883.50	873.38	7,534.53
-0.31%	-39.1% d/d	-0.38%

00 MARKET COMMENTARY

FRIDAY · CLOSE OF TRADE

The All Share Price Index fell **0.33%** to **20,812.64**, handing back the whole of yesterday's 67.97-point gain and nine cents more. The S&P SL20 eased 0.31% to 5,883.50. Two sessions into October the index is **0.00% on the month** and 8.00% down on the year, and the RSI has slipped back to 30.96, within a point of the oversold line it crossed yesterday.

Breadth collapsed. **78 securities rose against 116 that fell**, an advance/decline ratio of 0.67 against 1.07 a day earlier, and the weakest of the week. The damage was broad rather than concentrated: the ten largest named contributors are a net -23.48 points, leaving **-44.78** to everything else. Carsons took 14.84 points on its own and Commercial Bank 12.10. Seven of the twenty rows the note names are not carried here, their closing prices being identical to yesterday's; Kotmale has now printed the same -4.54 on four consecutive sessions on a share that has not traded.

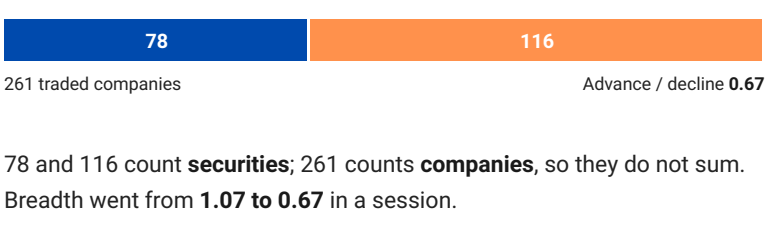
Turnover fell **39% to LKR 873.38 mn**, 76% below the year-to-date daily average of LKR 3.64 bn and the thinnest session of the week, and **42.4% of it was arranged** in nine crossings worth LKR 370.28 mn. Open-market trade was therefore nearer LKR 503 mn. Foreigners took out a net **LKR 140.21 mn**, selling 4.2 times what they bought, and two counters were 95% of that: Standard Capital at LKR 116.35 mn and the National Development Bank at LKR 55.30 mn.

Standard Capital is the session in one counter. It closed 21.4% higher at 44.30 on LKR 157.29 mn, the largest turnover of the day. But four crossings struck at a flat **LKR 40.00** accounted for LKR 156.35 mn of that, 99.4% of the counter's entire trade, while foreigners sold LKR 116.35 mn net. A 21% gain recorded on a day when almost nothing changed hands at the closing price is a number to treat with care, in our view.

Away from the market, nothing new was published. The Central Bank held the Overnight Policy Rate at **8.75%** on 30 September and CCPI inflation was unchanged at **8.0%** in September, with core accelerating to 5.4%. The 364-day Treasury bill cleared at **9.95%** at the 30 September auction; the next is on 7 October.

01 MARKET BENCHMARK

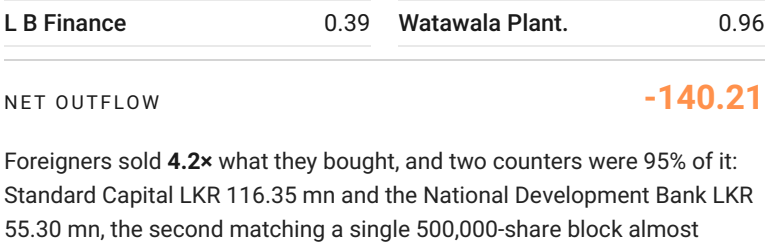
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Monday 28 September. Yesterday's **0.33%** gain is handed back in full, and both lines finish the week within 0.01 of each other at 99.4.

02 CONTRIBUTORS TO ASPI

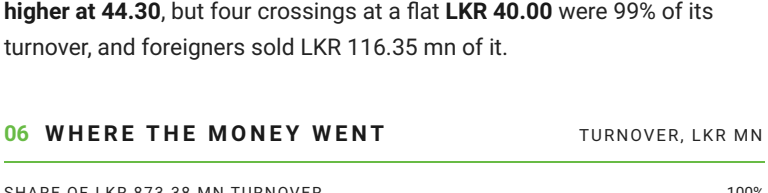
INDEX POINTS



Net -68.26 points. The ten shown are a net -23.48, so everything else together took **-44.78**. Seven of the note's twenty named rows are dropped: their closes are identical to yesterday's, and Kotmale has now printed -4.54 on four consecutive sessions without trading.

03 MARKET BREADTH

261 TRADED



78 and 116 count **securities**; 261 counts **companies**, so they do not sum. Breadth went from **1.07 to 0.67** in a session.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT **43.46** SOLD **183.67**

LARGEST NET BUYS	LARGEST NET SELLS
Ambeon Capital 33.00	Standard Capital 116.35
SMB Finance 4.82	National Development Bank 55.30
Chevron Lubricants 1.56	John Keells 3.57
Browns Inv 0.50	Sunshine 2.59
L B Finance 0.39	Watawala Plant. 0.96

NET OUTFLOW **-140.21**

Foreigners sold **4.2x** what they bought, and two counters were 95% of it: Standard Capital LKR 116.35 mn and the National Development Bank LKR 55.30 mn, the second matching a single 500,000-share block almost exactly.

05 TOP MOVERS

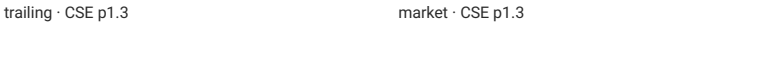
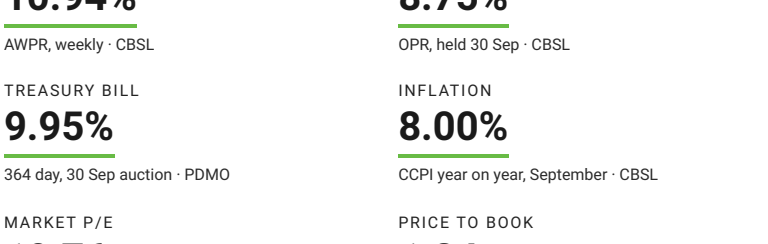
PRICE CHANGE, %

GAINERS	%	LOSERS	%
SING	+21.4	SEMB[X]	-25.0
TESS[X]	+7.1	SEMB	-8.3
HUNA	+6.3	CITW	-6.3
LCEY	+5.8	COCO[X]	-5.2
CPRT	+5.4	MDL	-5.1

The largest gainer is the day's largest story. Standard Capital closed **21.4% higher at 44.30**, but four crossings at a flat **LKR 40.00** were 99% of its turnover, and foreigners sold LKR 116.35 mn of it.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



Five counters took **45.9%** of a day that was itself 39% thinner than yesterday. **Nine crossings worth LKR 370.28 mn** were 42.4% of turnover, so open-market trade was nearer LKR 503 mn.

07 MARKET PERFORMANCE

BASES NAMED BELOW

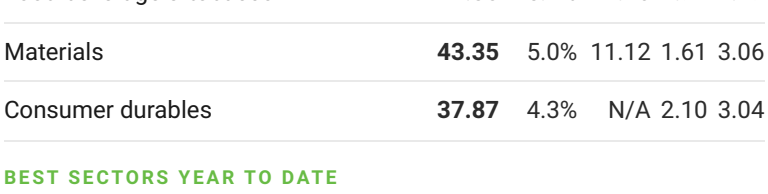
METRIC	02.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 01.10			
All Share Price Index	20,812.64	20,880.90	-0.33
S&P Sri Lanka 20	5,883.50	5,901.65	-0.31
Market cap, LKR bn	7,534.53	7,563.18	-0.38
Dividend yield, %	3.19	3.18	0.31

AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	873.38	3,640.00	-76.01
Share volume, mn	29.94	141.26	-78.81
Trades	10,591	27,420	-61.37

TODAY			
Foreign purchases, LKR mn	43.46	—	—
Foreign sales, LKR mn	183.67	—	—
Net foreign flow, LKR mn	-140.21	—	—
Traded companies	261	—	—

08 MOMENTUM AND RATES

NEUTRAL



PRIME LENDING RATE	POLICY RATE
10.94%	8.75%
AWPR, weekly · CBSL	OPR, held 30 Sep · CBSL

TREASURY BILL	INFLATION
9.95%	8.00%
364 day, 30 Sep auction · PDMO	CCPI year on year, September · CBSL

MARKET P/E	PRICE TO BOOK
10.76x	1.24x
trailing · CSE p1.3	market · CSE p1.3

09 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

CODE	COMPANY	EX-DIV	PAYMENT	TO EX-DIV	LKR/SHARE
ACL	ACL Cables	7 Oct	26 Oct	+5d	0.60
ALUM	Alumex	9 Oct	21 Oct	+7d	0.20
DIPD	Dipped Products	9 Oct	22 Oct	+7d	0.96
HAYC	Haycarb	9 Oct	22 Oct	+7d	1.00
KVAL	Kelani Valley	9 Oct	21 Oct	+7d	0.20
MGT	Hayleys Fabric	9 Oct	21 Oct	+7d	0.27
SINS	Singer Sri Lanka	9 Oct	22 Oct	+7d	0.34
TPL	Talawakelle	9 Oct	21 Oct	+7d	0.80
LPRT	Lake House Printers	1 Oct	7 Oct	-1d	4.00
MCPL	Mahaweli Coconut	1 Oct	20 Oct	-1d	3.00

The rule beside each row is the wait from ex-dividend to payment. Amounts are LKR per share. **Dates to be confirmed against the CSE announcements.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

INDUSTRY GROUP	TURNOVER	SHARE	PER	PBV	DY
BY TURNOVER TODAY, LKR MN					
Banks	244.40	28.0%	4.82	0.76	4.11
Real estate mgmt & dev	177.44	20.3%	9.55	1.15	2.10
Diversified financials	93.79	10.7%	7.85	0.80	2.69
Capital goods	72.50	8.3%	17.57	1.07	2.24
Energy	71.03	8.1%	13.73	0.92	0.00
Food beverage & tobacco	47.36	5.4%	14.46	1.94	4.79
Materials	43.35	5.0%	11.12	1.61	3.06
Consumer durables	37.87	4.3%	N/A	2.10	3.04

BEST SECTORS YEAR TO DATE					
Telecommunication services	+46%				
Commercial & professional	+24%				
Real estate management	+16%				
Health care equipment	+3%				
Transportation	+2%				

Two sectors took **48.3%** of the day. Banks trade on **4.82x** earnings and 0.76x book against a market on 10.76x and 1.24x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	-0.3%	+13.7%
Pakistan	Karachi All Share	-0.1%	-2.5%
Vietnam	VN Index	-0.5%	-2.5%
Sri Lanka	CSE All Share	-0.3%	-8.0%

EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	+0.3%	+67.4%
South Korea	KOSPI	+0.5%	+66.2%
Thailand	SET Index	+0.5%	+24.8%
Malaysia	FTSE Bursa KLCI	0.0%	-2.9%
China	Dow Jones Shanghai	0.0%	-3.6%
China	SZSE Component	-0.1%	-4.7%
Philippines	PSEi Composite	0.0%	-7.0%
India	Nifty 50	-0.9%	-14.2%
India	BSE Sensex 30	-0.8%	-15.6%
Indonesia	JSE Composite	+0.4%	-30.2%

DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	-0.3%	+35.8%
Singapore	FTSE Singapore	-0.7%	+22.3%
New Zealand	NZX 50	-0.9%	+1.0%
Australia	S&P/ASX 200	+0.8%	-0.4%
Hong Kong	Hang Seng	-2.6%	-6.5%

Sri Lanka is **fifteenth of seventeen** on the year and the weakest frontier market in the table. Only India's Sensex and Indonesia have done worse.

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