DAILY MARKET WATCH

CAPITAL TRUST RESEARCH

05th October 2026

Monday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,644.26

▼ −168.38 · 0.81% | ASPI YTD −8.75% | SL20 YTD −5.04%

Breadth broke down: **171 securities fell against 29 that rose**, the weakest reading of the run, on a day most of Asia spent higher.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,847.02	3,160.80	7,469.47
-0.62%	+261.9% d/d	-0.86%

00 MARKET COMMENTARY

MONDAY · CLOSE OF TRADE

The All Share Price Index fell **0.81%** to **20,644.26**, the largest fall of the run and the fifth down session in six. The S&P SL20 eased 0.62% to 5,847.02. The index is **0.81% down on the month** and 8.75% on the year, and the RSI has fallen to 25.73, back below the oversold line it crossed on Thursday.

Breadth did not weaken, it broke. **29 securities rose against 171 that fell**, an advance/decline ratio of **0.17** against 0.67 on Friday and the weakest reading on file. The fall was almost entirely outside the named rows: the ten largest contributors carried here are a net −49.61 points, leaving **−118.77** to everything else. Dialog alone took 22.68 points on a 70-cent fall. Six of the note's twenty rows are not carried, their closes being identical to Friday's, and Carsons prints the same −14.84 it printed then on a share that has not moved since.

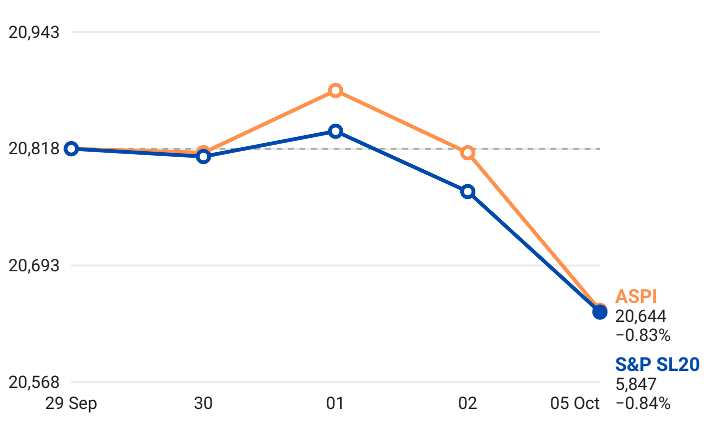
Turnover rose **262% to LKR 3,160.80 mn**, the heaviest session of the run though still 13% below the year-to-date daily average, and **40.6% of it was arranged** in twenty-three crossings worth LKR 1,282.61 mn. Open-market trade was therefore nearer LKR 1,878 mn. Foreigners took out a net **LKR 112.45 mn**, selling 4.5 times what they bought, and the National Development Bank was LKR 59.95 mn of that on a single block.

Access Engineering is the session in one counter. It traded LKR 1,448.85 mn, 45.8% of the whole market, of which nine crossings at a flat **LKR 79.50** were LKR 622.83 mn. Unlike Friday's Standard Capital blocks, these were struck at the market: the screen closed at 79.40, ten cents away. Foreigners sold LKR 31.80 mn of it. Standard Capital meanwhile rose another 19.4%, this time on LKR 1.65 mn and no blocks at all.

The fall was local. **Twelve of the nineteen Asian markets the note tracks rose**, Taiwan 2.5% and the Philippines 2.0% among them, and Sri Lanka had the second-worst day of the nineteen. Away from the market the Central Bank held the Overnight Policy Rate at **8.75%** on 30 September and the 364-day Treasury bill cleared at **9.95%** at that auction; the next is on Wednesday 7 October.

01 MARKET BENCHMARK

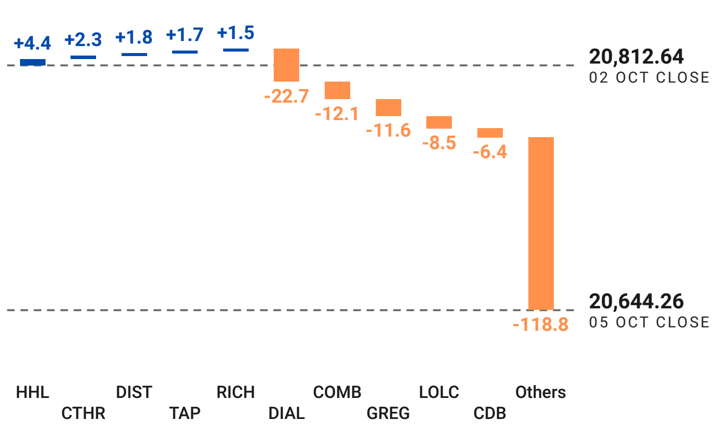
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Tuesday 29 September. The index gave up **0.81%** in a session, the largest fall of the five, and both lines close below where the week began.

02 CONTRIBUTORS TO ASPI

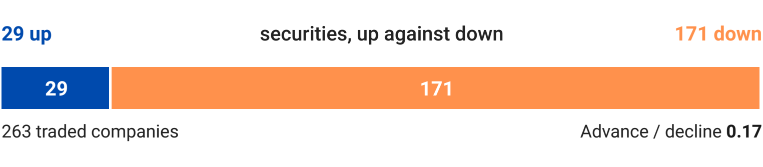
INDEX POINTS



Net −168.38 points. The ten shown are a net −49.61, so everything else together took **−118.77**. Six of the note's twenty named rows are dropped as dead and two more as unverifiable; Carsons prints the same −14.84 it printed on Friday on a share that has not moved.

03 MARKET BREADTH

263 TRADED



29 and 171 count **securities**; 263 counts **companies**, so they do not sum. Advance/decline fell from **0.67 to 0.17**. Page 1.6 of the note gives 32 and 182 for the same session.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT	32.57	SOLD	145.01
LARGEST NET BUYS		LARGEST NET SELLS	
Vidullanka	4.16	**NDB Bank**	59.95
L B Finance	1.49	**Access Engineering**	31.80
SMB Finance	0.55	**John Keells**	9.95
Browns Inv	0.49	**Dialog Axiata**	7.18
Digital Mobility	0.38	**Tokyo Cement Co**	5.92

NET OUTFLOW **-112.45**

Foreigners sold **4.5×** what they bought. The National Development Bank accounted for **LKR 59.95 mn** of it, matching a single 545,000-share block at 110.00 to the rupee.

05 TOP MOVERS

PRICE CHANGE, %

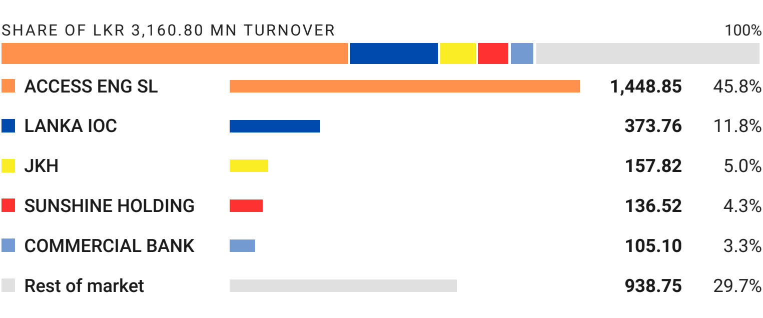
GAINERS	%	LOSERS	%
SING	+19.4	SHOT	-10.1
CITW	+6.7	GREG	-9.3
TESS	+5.9	WAPO	-7.6
RPBH	+3.8	KAHA	-7.2
LUMX	+3.5	TSML	-6.8

Standard Capital rose **19.4%** for a second session, this time on LKR 1.65 mn of trade and no crossings at all. Friday's 21% came with LKR 156 mn of blocks struck at a flat LKR 40.00.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 3,160.80 MN TURNOVER



ACCESS ENG SL	**1,448.85**	45.8%
LANKA IOC	**373.76**	11.8%
JKH	**157.82**	5.0%
SUNSHINE HOLDING	**136.52**	4.3%
COMMERCIAL BANK	**105.10**	3.3%
Rest of market	**938.75**	29.7%

Five counters took **70.3%** of a day 3.6 times heavier than Friday. **Twenty-three crossings worth LKR 1,282.61 mn** were 40.6% of turnover, so open-market trade was nearer LKR 1,878 mn.

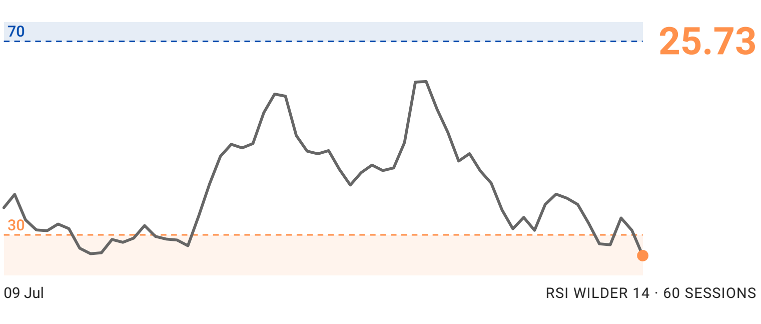
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	05.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 02.10			
All Share Price Index	**20,644.26**	20,812.64	-0.81
S&P Sri Lanka 20	**5,847.02**	5,883.50	-0.62
Market cap, LKR bn	**7,469.47**	7,534.53	-0.86
Dividend yield, %	**3.22**	3.19	0.94
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	**3,160.80**	3,640.00	-13.16
Share volume, mn	**67.64**	140.86	-51.98
Trades	**16,131**	27,360	-41.04
TODAY			
Foreign purchases, LKR mn	**32.57**	—	—
Foreign sales, LKR mn	**145.01**	—	—
Net foreign flow, LKR mn	**-112.45**	—	—
Traded companies	**263**	—	—

08 MOMENTUM AND RATES

OVERSOLD



PRIME LENDING RATE **11.04%** AWPR, week to 2 Oct · CBSL	POLICY RATE **8.75%** OPR, held 30 Sep · CBSL
TREASURY BILL **9.95%** 364 day, 30 Sep auction · PDMO	INFLATION **8.00%** CCPI year on year, September · CBSL
MARKET P/E **10.67x** trailing · CSE p1.3	PRICE TO BOOK **1.23x** market · CSE p1.3

09 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

■ GOES EX WITHIN 7 DAYS OF THIS NOTE

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					
Capital goods	**1,722.33**	54.5%	17.45	1.06	2.26
Energy	**373.98**	11.8%	13.67	0.92	0.00
Food beverage & tobacco	**364.89**	11.5%	14.44	1.94	4.79
Banks	**269.09**	8.5%	4.80	0.76	4.13
Diversified financials	**143.24**	4.5%	7.70	0.79	2.74
Materials	**74.95**	2.4%	11.02	1.60	3.09
Utilities	**47.92**	1.5%	19.11	2.00	0.83
Transportation	**40.86**	1.3%	N/A	0.44	14.99
BEST SECTORS YEAR TO DATE					
Telecommunication services	**+44%**				
Commercial & professional	**+24%**				
Real estate management	**+15%**				
Transportation	**+3%**				
Health care equipment	**+2%**				

One sector took **54.5%** of the day. Capital goods trade on **17.45x** earnings against a market on 10.67x, and banks on 4.80x and 0.76x book.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	−0.9%	**+12.7%**
Vietnam	VN Index	+0.9%	**−1.8%**
Pakistan	Karachi All Share	−1.2%	**−3.9%**
Sri Lanka	CSE All Share	−0.8%	**−8.8%**
EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	+2.5%	**+71.5%**
South Korea	KOSPI	+0.5%	**+66.2%**
Thailand	SET Index	+0.2%	**+25.0%**
Malaysia	FTSE Bursa KLCI	+0.1%	**−2.9%**
China	Dow Jones Shanghai	0.0%	**−3.6%**
China	SZSE Component	−0.1%	**−4.7%**
Philippines	PSEi Composite	+2.0%	**−5.1%**
India	Nifty 50	+0.6%	**−13.7%**
India	BSE Sensex 30	+0.5%	**−15.2%**
Indonesia	JSE Composite	+1.1%	**−29.4%**
DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	+0.5%	**+39.0%**
Singapore	FTSE Singapore	−0.5%	**+21.3%**
New Zealand	NZX 50	+0.1%	**+1.1%**
Australia	S&P/ASX 200	0.0%	**−0.3%**
Hong Kong	Hang Seng	+0.3%	**−6.2%**

Twelve of the nineteen rose and Sri Lanka had the second-worst day of the set. On the year it is sixteenth of nineteen.

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