DAILY MARKET WATCH

CAPITAL TRUST
RESEARCH

06th October 2026

Tuesday

COLOMBO STOCK EXCHANGE | CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,650.23

▲ +5.97 · 0.03% | ASPI YTD −8.72% | SL20 YTD −5.09%

The index scraped a gain while the S&P SL20 fell: **breadth recovered from 29 risers to 87**, on the thinnest turnover since the run began.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,844.28	**1,065.65**	**7,477.09**
-0.05%	-66.3% d/d	+0.10%

00 MARKET COMMENTARY

TUESDAY · CLOSE OF TRADE

The All Share Price Index rose **0.03%** to **20,650.23**, a gain of 5.97 points and the third rise in three sessions. The S&P SL20 did not join it, easing 0.05% to 5,844.28. The index is **0.78% down on the month** and 8.72% on the year, and the RSI has edged up to 26.21, still well inside oversold.

The recovery was in breadth, not in level. 87 securities rose against 108 that fell, an advance/decline ratio of 0.81 against Monday's 0.17, which was the weakest reading on file. That the SL20 fell while the broad index rose says where the buying was: in the smaller end of the board, not in the large caps.

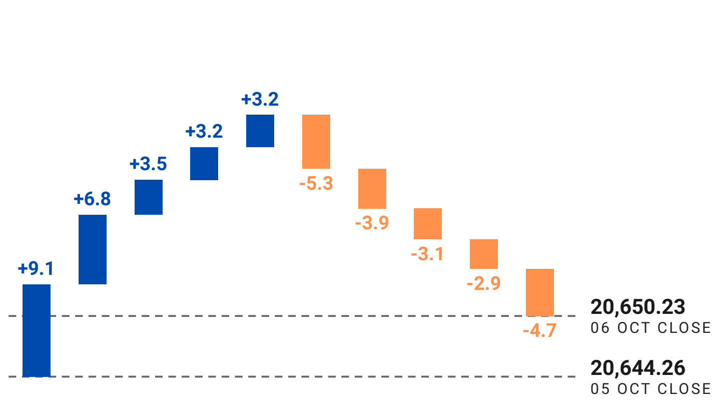
Seven of the twenty contributor rows the note names are not carried here. Their closing prices are identical to Monday's, so they cannot have moved the index. **Two of them are Dialog Axiata at −22.68 points and Commercial Bank at −12.10**, the exact figures the same table printed on Monday, when both were real. Read as printed, the note's twenty rows imply a heavy fall on a day the index rose.

Turnover fell **66% to LKR 1,065.65 mn**, 71% below the year-to-date daily average and the thinnest session of the run, with **27.2% of it arranged** in four crossings worth LKR 289.74 mn. One of those, 3,000,000 Citizens Development Business shares at a flat LKR 33.00, was 97.9% of that counter's entire trade. Foreigners took out a net LKR 29.28 mn, the most even session of the run at 1.3 times sold to bought.

Asiri Surgical is the session in one counter. It fell 21.9% to LKR 10.00 on LKR 156.42 mn, the largest turnover of the day and almost the whole of the health care sector, and foreigners bought **LKR 70.01 mn** of it, 88% of all foreign buying. A fall of that size meeting the day's largest foreign purchase in the same counter is worth watching, in our view. Away from the market the Central Bank held the policy rate at 8.75% on 30 September and the next Treasury bill auction is tomorrow.

01 MARKET BENCHMARK

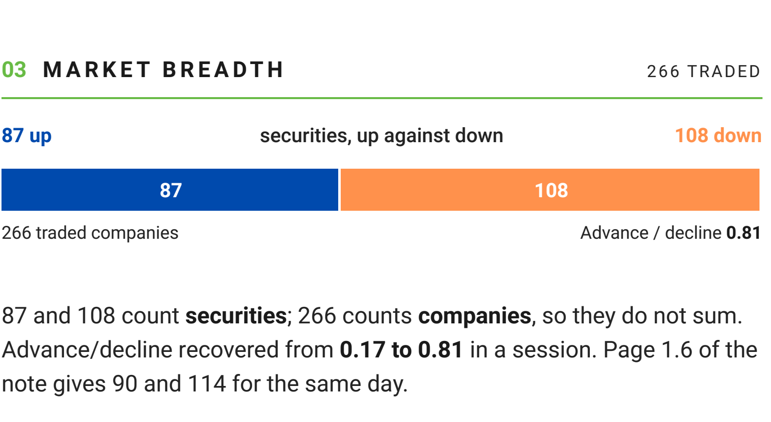
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Wednesday 30 September. The index steadied after Monday's 0.81% fall, but the **S&P SL20 did not**, and the two lines have now parted.

02 CONTRIBUTORS TO ASPI

INDEX POINTS

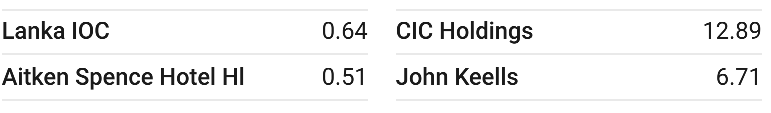


Net +5.97 points. The nine shown are a net +10.63, so everything else together took **−4.66**. Seven of the note's twenty named rows are dropped as dead, Dialog and Commercial Bank among them: both repeat Monday's figures on shares that did not move.

03 MARKET BREADTH

266 TRADED

87 up | securities, up against down | **108 down**



266 traded companies | Advance / decline **0.81**

87 and 108 count **securities**; 266 counts **companies**, so they do not sum. Advance/decline recovered from **0.17 to 0.81** in a session. Page 1.6 of the note gives 90 and 114 for the same day.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT	**86.16**	SOLD	**115.44**
LARGEST NET BUYS		LARGEST NET SELLS	
Asiri Surgical Hosp.	70.01	Commercial Bank	59.80
Ambeon Capital	7.47	Dialog Axiata	23.51
Lanka IOC	0.64	CIC Holdings	12.89
Aitken Spence Hotel Hl	0.51	John Keells	6.71
Nations Trust Bank	0.22	hSenid Business Sol.	2.46

NET OUTFLOW **-29.28**

Foreigners sold **1.3×** what they bought, the most even day of the run. **Asiri Surgical was 88% of all foreign buying** at LKR 70.01 mn, on the day its share fell 21.9%.

05 TOP MOVERS

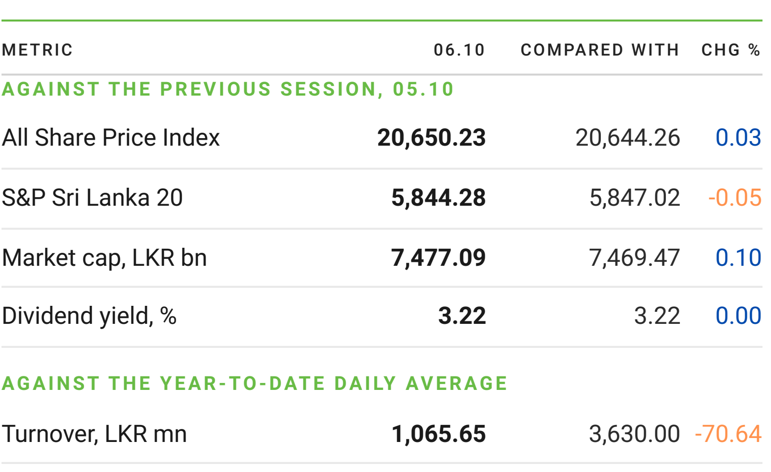
PRICE CHANGE, %

GAINERS	%	LOSERS	%
SHOT	+9.2	AMSL	-21.9
GREG	+8.1	SING	-9.1
CTLD	+7.3	SHL	-7.3
TESS[X]	+7.1	LUMX	-6.8
KAHA	+6.4	CITW	-6.3

Asiri Surgical fell **21.9%** on the heaviest turnover of the day, and was the only counter in either list to move the index. The rest of the board was quiet: 102 securities did not move at all.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



Five counters took **45.6%** of a day two thirds thinner than Monday. **Four crossings worth LKR 289.74 mn** were 27.2% of turnover, so open-market trade was nearer LKR 776 mn.

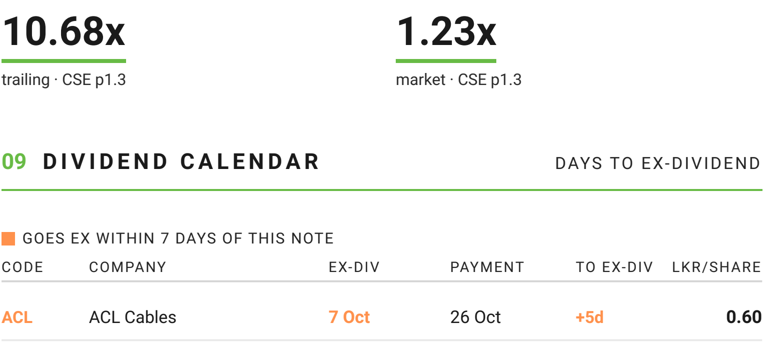
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	06.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 05.10			
All Share Price Index	**20,650.23**	20,644.26	0.03
S&P Sri Lanka 20	**5,844.28**	5,847.02	-0.05
Market cap, LKR bn	**7,477.09**	7,469.47	0.10
Dividend yield, %	**3.22**	3.22	0.00
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	**1,065.65**	3,630.00	-70.64
Share volume, mn	**43.09**	140.33	-69.29
Trades	**12,539**	27,280	-54.04
TODAY			
Foreign purchases, LKR mn	**86.16**	—	—
Foreign sales, LKR mn	**115.44**	—	—
Net foreign flow, LKR mn	**-29.28**	—	—
Traded companies	**266**	—	—

08 MOMENTUM AND RATES

OVERSOLD



PRIME LENDING RATE	POLICY RATE
11.04%	**8.75%**
AWPR, week to 2 Oct · 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
10.68x	**1.23x**
trailing · CSE p1.3	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					
Food beverage & tobacco	243.40	22.8%	14.46	1.94	4.79
Diversified financials	165.71	15.5%	7.72	0.79	2.73
Banks	159.88	15.0%	4.79	0.75	4.14
Health care equipment	158.51	14.9%	9.96	1.45	0.86
Capital goods	121.74	11.4%	17.45	1.06	2.26
Materials	77.63	7.3%	10.99	1.60	3.09
Real estate mgmt & dev	36.34	3.4%	9.44	1.14	2.12
Telecommunication svcs	26.14	2.5%	13.09	2.90	3.82
BEST SECTORS YEAR TO DATE					
Telecommunication services	+44%				
Commercial & professional	+24%				
Real estate management	+14%				
Transportation	+2%				
Health care equipment	0%				

No sector took a fifth of the day. **Health care** is the exception that is not one: its **LKR 158.51 mn** is almost entirely a single counter.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	−0.7%	**+11.9%**
Vietnam	VN Index	+0.2%	**−1.5%**
Pakistan	Karachi All Share	+1.0%	**−3.0%**
Sri Lanka	CSE All Share	0.0%	**−8.7%**
EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	+0.1%	**+71.8%**
South Korea	KOSPI	−0.9%	**+64.7%**
Thailand	SET Index	+0.2%	**+25.4%**
Malaysia	FTSE Bursa KLCI	+0.1%	**−2.8%**
China	Dow Jones Shanghai	0.0%	**−3.6%**
China	SZSE Component	−0.1%	**−4.7%**
Philippines	PSEi Composite	−1.2%	**−6.2%**
India	Nifty 50	+0.7%	**−13.1%**
India	BSE Sensex 30	+0.7%	**−14.5%**
Indonesia	JSE Composite	+1.4%	**−28.2%**
DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	+1.1%	**+40.7%**
Singapore	FTSE Singapore	−0.5%	**+21.3%**
New Zealand	NZX 50	0.0%	**+1.1%**
Australia	S&P/ASX 200	+0.6%	**+0.2%**
Hong Kong	Hang Seng	+1.0%	**−5.3%**

Eleven of the nineteen rose and Sri Lanka was flat on the note's own scale. On the year it is sixteenth of nineteen.

CAPITAL TRUST
RESEARCH

42, Sir Mohammed 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.