CAPITAL TRUST
RESEARCH

DAILY MARKET WATCH

07th October 2026

Wednesday

COLOMBO STOCK EXCHANGE — CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,517.55

▼ −132.68 · 0.64% | ASPI YTD −9.31% | SL20 YTD −5.54%

The index gave up another 0.64%, **and the region went with it**: 13 of the other 18 Asian indices were down too.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,816.40	**1,969.43**	**7,433.05**
-0.48%	+84.8% d/d	-0.59%

00 MARKET COMMENTARY

WEDNESDAY · CLOSE OF TRADE

The All Share Price Index fell **0.64%** to **20,517.55**, the lowest close of the run and a third fall in four sessions. The S&P SL20 eased 0.48% to 5,816.40. The index is **1.42% down on the month** and 9.31% on the year, and the RSI has fallen to 22.72, the deepest reading of this run.

This fall was not ours alone. Monday's was: eleven of the other eighteen indices on the note's global page rose that day while the index here fell. Today thirteen of the other eighteen fell, Korea 2.0% and Malaysia 1.3% among them, and Sri Lanka's 0.6% was the seventh worst rather than an outlier. On the year it is still sixteenth of nineteen.

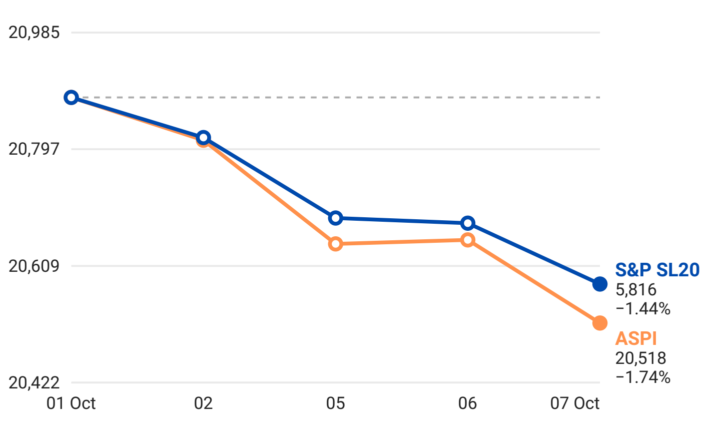
52 securities rose against 158 that fell, an advance/decline ratio of **0.33** after Tuesday's 0.81. The damage sat outside the large names: the ten largest contributors carried here are a net −34.08 points, leaving **−98.60** to everything else. Six of the note's twenty rows are not carried, their closes being identical to Tuesday's, and S M B Finance, Ceylon Beverage and Kotmale have now printed the same figures for a third straight session on shares that have not traded.

Turnover rose **85% to LKR 1,969.43 mn** but was still 46% below the year-to-date daily average, and **44.5% of it was arranged** in seven crossings worth LKR 876.46 mn. All seven sit in three counters: one Lanka IOC block of 3,700,000 shares at LKR 127.00 was 82.7% of that counter's trade, five Ceylon Cold Stores blocks at a flat LKR 118.00 were 91.5% of its, and one John Keells block of 5,000,000 at LKR 18.30 was 78.5% of its. Open-market trade was therefore nearer LKR 1,093 mn.

Foreigners barely participated. Purchases of LKR 8.38 mn against sales of LKR 31.52 mn put them at 1.0% of the day's two-way trade, the lowest of the run against a year-to-date 16.0%. The debt market also traded for the first time in the run, at LKR 338.81 mn. Away from the market, the Treasury bill auction was held today and the result was not published at the time of this note.

01 MARKET BENCHMARK

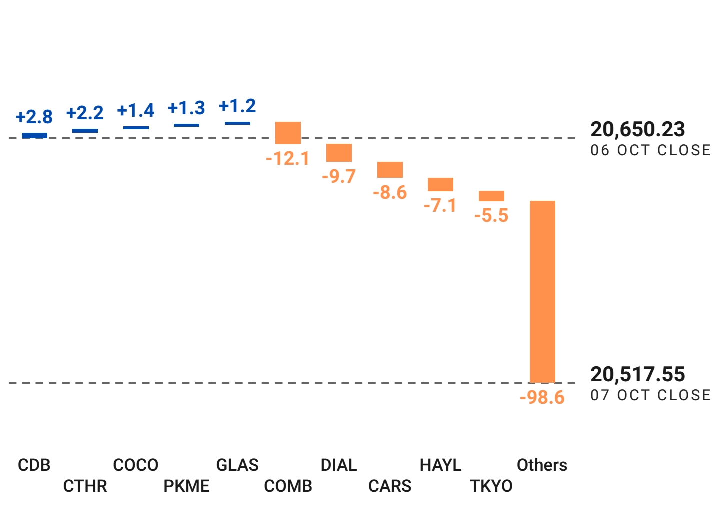
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Thursday 1 October. The index is **1.74% lower** across the five sessions and closed at the lowest point of the run; the SL20 is 1.44% lower.

02 CONTRIBUTORS TO ASPI

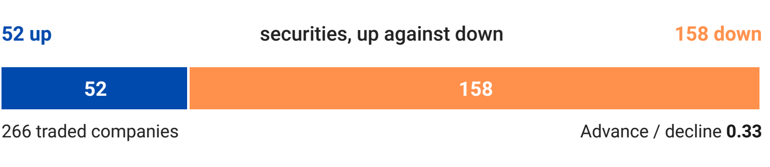
INDEX POINTS



Net −132.68 points. The ten shown are a net −34.08, so everything else together took **−98.60**. Six of the note's twenty named rows are dropped as dead, three of them for a third straight session.

03 MARKET BREADTH

266 TRADED



52 and 158 count **securities**; 266 counts **companies**, so they do not sum. Advance/decline fell from **0.81 back to 0.33**. Page 1.6 of the note gives 55 and 163 for the same day.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT	8.38	SOLD	31.52
LARGEST NET BUYS		LARGEST NET SELLS	
HNB Finance	3.38	ACL Cables	12.17
Chevron Lubricants	2.61	CIC Holdings	5.15
Hatton National Bank	0.32	John Keells	4.91
Commercial Bank	0.25	Lanka Credit & Bus.	3.62
Singhe Hospitals	0.20	Dialog Axiata	1.94

NET OUTFLOW **-23.14**

Foreigners were **1.0% of the day's trade**, the lowest participation of the run, and sold 3.8× what they bought. A C L Cables was LKR 12.17 mn of a LKR 30.80 mn total.

05 TOP MOVERS

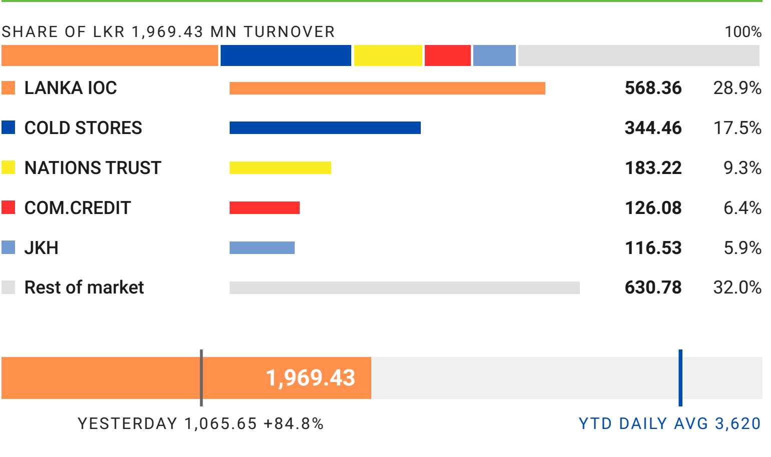
PRICE CHANGE, %

GAINERS	%	LOSERS	%
MRH	+6.3	SING	-10.8
PACK	+3.9	AFS	-10.4
PMB	+3.5	MHDL	-8.2
HDFC	+3.3	COLO	-7.2
SHL	+3.1	LGL[X]	-6.0

Standard Capital fell **10.8% to 42.90**, a second day down, and is now below the 44.30 it closed at on 2 October before a 19.4% gain. The round trip took four sessions.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



Five counters took **68.0%** of the day. **Seven crossings worth LKR 876.46 mn** were 44.5% of turnover and sit in only three names, so open-market trade was nearer LKR 1,093 mn.

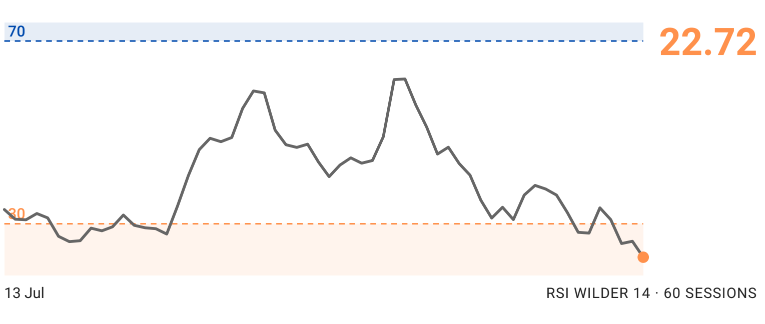
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	07.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 06.10			
All Share Price Index	**20,517.55**	20,650.23	-0.64
S&P Sri Lanka 20	**5,816.40**	5,844.28	-0.48
Market cap, LKR bn	**7,433.05**	7,477.09	-0.59
Dividend yield, %	**3.24**	3.22	0.62
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	**1,969.43**	3,620.00	-45.60
Share volume, mn	**60.40**	139.90	-56.83
Trades	**14,775**	27,210	-45.70
TODAY			
Foreign purchases, LKR mn	**8.38**	—	—
Foreign sales, LKR mn	**31.52**	—	—
Net foreign flow, LKR mn	**-23.14**	—	—
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
10.62x	**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					
Energy	**570.24**	29.0%	13.44	0.90	0.00
Food beverage & tobacco	**406.80**	20.7%	14.39	1.93	4.81
Diversified financials	**212.44**	10.8%	7.65	0.78	2.76
Banks	**208.23**	10.6%	4.77	0.75	4.16
Capital goods	**196.87**	10.0%	17.35	1.06	2.27
Materials	**134.09**	6.8%	10.93	1.59	3.11
Health care equipment	**82.85**	4.2%	9.80	1.43	0.87
Real estate mgmt & dev	**62.95**	3.2%	9.41	1.14	2.13
BEST SECTORS YEAR TO DATE					
Telecommunication services	**+43%**				
Commercial & professional	**+23%**				
Real estate management	**+14%**				
Transportation	**+4%**				
Health care equipment	**-1%**				

Two sectors took **49.7%** of the day, and each one is a single counter and a single block: **energy** is Lanka IOC, **food and beverage** is Cold Stores.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	−0.4%	**+11.5%**
Vietnam	VN Index	−0.3%	**−1.7%**
Pakistan	Karachi All Share	+0.5%	**−2.3%**
Sri Lanka	CSE All Share	−0.6%	**−9.3%**
EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	−0.2%	**+71.6%**
South Korea	KOSPI	−2.0%	**+61.5%**
Thailand	SET Index	+0.3%	**+26.0%**
China	Dow Jones Shanghai	0.0%	**−3.6%**
Malaysia	FTSE Bursa KLCI	−1.3%	**−4.1%**
China	SZSE Component	−0.1%	**−4.7%**
Philippines	PSEi Composite	+1.0%	**−5.2%**
India	Nifty 50	−0.7%	**−13.4%**
India	BSE Sensex 30	−0.7%	**−14.9%**
Indonesia	JSE Composite	−0.7%	**−28.9%**
DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	−0.8%	**+39.4%**
Singapore	FTSE Singapore	+0.5%	**+21.9%**
New Zealand	NZX 50	−0.1%	**+1.0%**
Australia	S&P/ASX 200	−0.1%	**+0.2%**
Hong Kong	Hang Seng	−0.6%	**−5.9%**

Thirteen of the other eighteen fell, the mirror of Monday. Sri Lanka's 0.6% is the seventh worst of the nineteen today and sixteenth on the year.

CAPITAL TRUST
RESEARCH
42, Sir Mohammed Macan Markar Mawatha, Colombo 03
0705 666 777
inquiries@capitaltrust.lk

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