

CAPITALTRUSTRESEARCH

DAILY MARKET WATCH

08th October 2026

Thursday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,234.34

▼ -283.21 · 1.38%

ASPI YTD -10.56%

SL20 YTD -6.41%

The lowest close of the year, and only 25 securities rose: nearly eight shares fell for every one that rose.

S&P SL20

5,762.56

-0.93%

TURNOVER, LKR MN

2,741.07

+39.2% d/d

MARKET CAP, LKR BN

7,329.64

-1.39%

00 MARKET COMMENTARY

THURSDAY · CLOSE OF TRADE

The All Share Price Index fell 1.38% to 20,234.34, the largest fall of the run and the lowest close of the year: the note's own year-low field now reads today's close. The S&P SL20 fell 0.93% to 5,762.56. The index is 2.78% down on the month and 10.56% on the year, and the RSI has fallen to 17.41.

Breadth broke again, further than Monday. Only 25 securities rose against 195 that fell, which is nearly eight fallers for every riser and the weakest of the five sessions plotted here. None of the ten largest gainers moved more than 5.9%. The fall was almost entirely outside the named rows: the ten largest contributors carried here are a net -82.95 points, leaving -200.26 to everything else.

Four of the note's twenty rows are not carried, their closes being identical to yesterday's, and Ceylinco Holdings has now printed the same +6.84 for a fourth straight session on a share that has not traded. All four are on the positive side. Every one of the ten negative rows is real, which on a day this broad is what one would expect: there is nothing for a stale row to hide behind.

Turnover rose 39% to LKR 2,741.07 mn but was still 24% below the year-to-date daily average, and 53.9% of it was arranged in thirteen crossings worth LKR 1,478.84 mn. That is the first session of the run where more than half the market was arranged rather than traded on screen. Seven of the thirteen are Lanka Milk Foods at a flat LKR 83.00, LKR 1,053.89 mn in all and 94.7% of that counter's entire turnover; three more are Sunshine Holdings at LKR 322.40 mn, 85.1% of its.

The fall was regional. Fifteen of the other eighteen indices on the exchange's global page fell, Korea 2.6% and the Philippines 2.2% among them, and Sri Lanka's 1.4% was the seventh worst of the nineteen. On the year it is sixteenth of nineteen. Away from the market the Treasury bill auction was held yesterday; its result does not appear in this note either, so the 364-day rate below is still the 30 September figure and needs replacing from the PDMO before the next edition.

01 MARKET BENCHMARK

INDEX LEVELS; PATHS REBASED TO COMPARE

20,958

20,667

20,376

20,084

02 Oct

05

06

07

08 Oct

S&P SL20

5,763

-2.06%

ASPI

20,234

-2.78%

Rebased to Friday 2 October. The index is 2.78% lower across the five sessions and closed at the lowest point of the year; the SL20 is 2.06% lower.

02 CONTRIBUTORS TO ASPI

INDEX POINTS

+1.8

+1.5

+1.0

+0.8

+0.8

-26.3

-19.4

-18.1

-13.3

-11.7

-200.3

20,517.55

07 OCT CLOSE

20,234.34

08 OCT CLOSE

HAYL

HASU

RHL

ODEL

COLO

DIST

DIAL

CARS

HNB

HHL

Others

Net -283.21 points. The ten shown are a net -82.95, so everything else together took -200.26. All ten negative rows are real today; the four dropped as dead are all on the positive side.

03 MARKET BREADTH

264 TRADED

25 up

securities, up against down

195 down

264 traded companies

Advance / decline 0.13

25 and 195 count securities; 264 counts companies, so they do not sum. Risers to fallers fell from 0.33 to 0.13, below Monday's 0.17 and the weakest of the run.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT

14.65

SOLD

32.03

LARGEST NET BUYS

LARGEST NET SELLS

Ambeon Capital

8.85

Sunshine

23.24

HNB Finance

1.69

John Keells

6.04

Singhe Hospitals

0.68

Haycarb

1.19

Aitken Spence

0.67

Watawala Plant.

0.46

Dialog Axiata

0.47

Jetwing Symphony

0.28

NET OUTFLOW

-17.38

Foreigners sold 2.2x what they bought on a small two-way total. Sunshine Holdings was 73% of all foreign selling at LKR 23.24 mn, on the day three blocks took 85% of its turnover.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS

%

LOSERS

%

COLO

+5.9

EXT

-10.5

SHOT

+5.5

BRR

-8.2

SING

+4.9

CHL

-8.0

RFL

+3.2

ASIR

-7.7

HASU

+3.0

CABO

-6.8

Only 25 securities rose and none of the ten largest gainers moved more than 5.9%. Standard Capital bounced 4.9% to 45.00 after two days down, and is back above the 44.30 it closed at on 2 October.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 2,741.07 MN TURNOVER

100%

LMF

1,113.09

40.6%

SUNSHINE HOLDING

378.79

13.8%

COM.CREDIT

163.52

6.0%

HAYLEYS

99.02

3.6%

SAMPATH

80.30

2.9%

Rest of market

906.35

33.1%

YESTERDAY 1,969.43 +39.2%

2,741.07

YTD DAILY AVG 3,610

Five counters took 66.9% of the day. Thirteen crossings worth LKR 1,478.84 mn were 53.9% of turnover, the first session of the run where arranged trade was more than half the market.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC

08.10

COMPARED WITH

CHG %

AGAINST THE PREVIOUS SESSION, 07.10

All Share Price Index

20,234.34

20,517.55

-1.38

S&P Sri Lanka 20

5,762.56

5,816.40

-0.93

Market cap, LKR bn

7,329.64

7,433.05

-1.39

Dividend yield, %

3.28

3.24

1.23

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn

2,741.07

3,610.00

-24.07

Share volume, mn

71.98

139.54

-48.42

Trades

19,466

27,170

-28.35

TODAY

Foreign purchases, LKR mn

14.65

—

—

Foreign sales, LKR mn

32.03

—

—

Net foreign flow, LKR mn

-17.38

—

—

Traded companies

264

—

—

08 MOMENTUM AND RATES

OVERSOLD

70

30

17.41

14 Jul

RSI WILDER 14 · 60 SESSIONS

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

10.47x

trailing · CSE p1.3

PRICE TO BOOK

1.21x

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/SKARE

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

1,589.43

58.0%

14.18

1.90

4.88

Capital goods

316.64

11.6%

17.15

1.04

2.30

Diversified financials

277.04

10.1%

7.54

0.77

2.80

Banks

184.55

6.7%

4.73

0.74

4.20

Materials

98.11

3.6%

10.79

1.57

3.15

Energy

50.72

1.9%

13.21

0.89

0.00

Real estate mgmt & dev

35.08

1.3%

9.18

1.11

2.18

Health care equipment

30.91

1.1%

9.40

1.37

0.91

BEST SECTORS YEAR TO DATE

Telecommunication services

+41%

Commercial & professional

+19%

Real estate management

+11%

Transportation

+2%

Health care equipment

-6%

One sector was 58.0% of the day's turnover, and that sector is one counter: Lanka Milk Foods, on seven blocks at a flat LKR 83.00.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET

INDEX

DAY

YTD

FRONTIER, ASIA-PACIFIC

Bangladesh

DSE Broad

+0.7%

+12.3%

Vietnam

VN Index

-0.7%

-2.5%

Pakistan

Karachi All Share

-0.5%

-3.1%

Sri Lanka

CSE All Share

-1.4%

-10.6%

EMERGING, ASIA-PACIFIC

Taiwan

Taiwan Weighted

-0.7%

+70.7%

South Korea

KOSPI

-2.6%

+57.2%

Thailand

SET Index

-0.9%

+24.6%

Malaysia

FTSE Bursa KLCI

-0.7%

-4.7%

China

Dow Jones Shanghai

-1.4%

-4.9%

China

SZSE Component

-2.1%

-6.7%

Philippines

PSEI Composite

-2.2%

-7.3%

India

Nifty 50

-1.7%

-15.0%

India

BSE Sensex 30

-1.6%

-16.1%

Indonesia

JSE Composite

-1.7%

-30.1%

DEVELOPED, ASIA-PACIFIC

Japan

Nikkei 225

-0.9%

+37.6%

Singapore

FTSE Singapore

+0.6%

+22.7%

New Zealand

NZX 50

+0.1%

+1.1%

Australia

S&P/ASX 200

-0.8%

-0.6%

Hong Kong

Hang Seng

-1.4%

-7.2%

Only three of the nineteen rose. Sri Lanka's 1.4% fall is the seventh worst today and sixteenth of nineteen on the year.

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