DAILY MARKET WATCH

09th October 2026

Friday

COLOMBO STOCK EXCHANGE — CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,316.91

▲ +82.57 · 0.41% | ASPI YTD −10.20% | SL20 YTD −5.99%

Most shares rose today, **but foreign money went the other way**: foreign selling was 15.9% of everything that traded.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,788.75	1,050.46	7,354.72
+0.45%	-61.7% d/d	+0.34%

00 MARKET COMMENTARY

FRIDAY · CLOSE OF TRADE

The All Share Price Index rose **0.41%** to **20,316.91**, its first gain in three sessions and a bounce off the year low of 20,234.34 set yesterday. The S&P SL20 rose 0.45% to 5,788.75. The index is 2.38% down on the month and 10.20% on the year, and the RSI has recovered to 23.06, still well inside oversold.

The turn in breadth was sharper than the turn in the index. 132 securities rose against 71 that fell, after 25 against 195 yesterday. Risers to fallers went from 0.13 to 1.86 in a session. The gain was broad rather than led: the eight largest contributors carried here are a net +37.36 points, leaving **+45.21** to everything else.

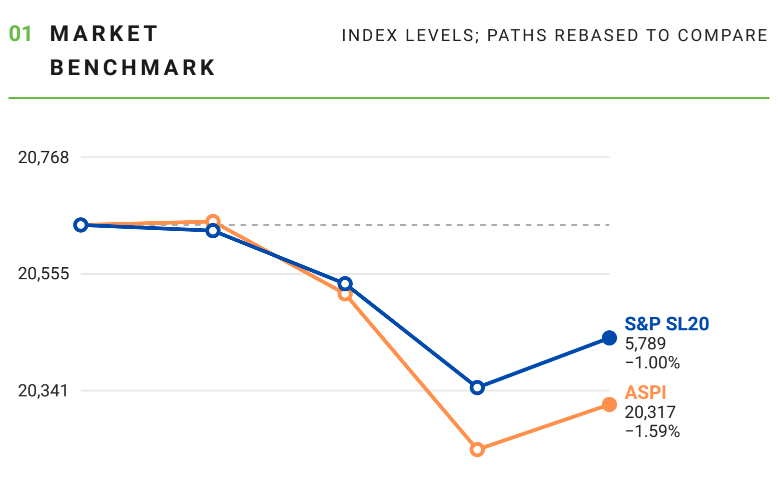
Foreigners sold 17.9 times what they bought, the most lopsided session of the run by a wide margin, taking out a net **LKR 157.47 mn** on a day the whole market traded LKR 1,050.46 mn. Selling was 15.9% of all turnover against buying at 0.9%. Lanka Milk Foods was LKR 102.71 mn of it, 72% of that counter's own trade, a day after seven blocks changed hands in it at a flat LKR 83.00.

Turnover fell **62% to LKR 1,050.46 mn**, the thinnest of the run and 71% below the year-to-date daily average. Only **20.2% was arranged**, in five crossings worth LKR 212.29 mn, which is the smallest arranged share of the run and comes directly after the session where it passed half. One Muller & Phipps block of 28,300,000 shares at LKR 2.20 was 92.5% of that counter's turnover.

Nine of the twenty contributor rows the note names are not carried here, the most of any session this kit has run, their closing prices being identical to yesterday's. S M B Finance is the instructive one: it printed −5.03 on four consecutive notes while its price sat at 1.10, and today it fell to 1.00 and printed −5.03 again. This time it is real. The figure never changed; only one of the five days earns it.

01 MARKET BENCHMARK

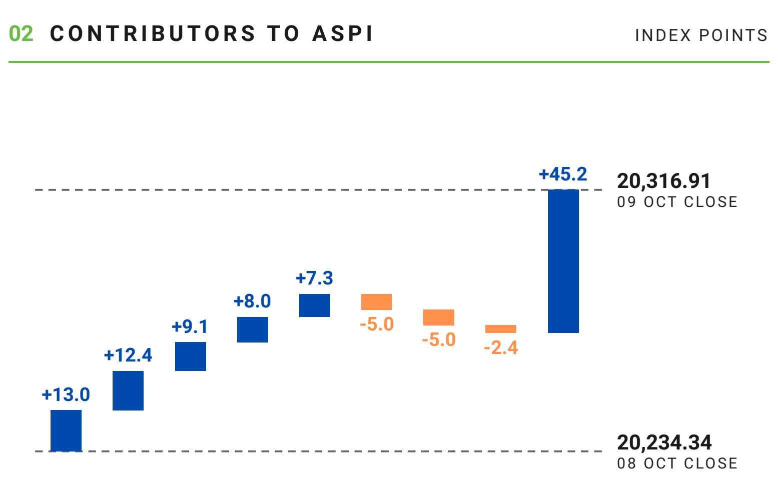
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Monday 5 October. The index is **1.59% lower** across the five sessions but turned up today, off the year low set yesterday.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net +82.57 points. The eight shown are a net +37.36, so everything else together added **+45.21**. Nine of the note's twenty named rows are dropped as dead, the most of any session this kit has run.

03 MARKET BREADTH

265 TRADED

132 up — securities, up against down — 71 down

265 traded companies

Advance / decline **1.86**

132 and 71 count **securities**; 265 counts **companies**, so they do not sum. Risers to fallers went from **0.13 to 1.86** in a session, the sharpest turn of the run.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT	9.30	SOLD	166.77
LARGEST NET BUYS		**LARGEST NET SELLS**	
Distilleries	5.10	Lanka Milk Foods	102.71
Digital Mobility	3.80	John Keells	37.52
Dipped Products	0.14	Asiri Surgical Hosp.	20.60
NDB Bank	0.04	Dialog Axiata	2.78
Sierra Cables	0.03	Sunshine	2.23

NET OUTFLOW **−157.47**

Foreigners sold **17.9×** what they bought, the most lopsided day of the run. **Lanka Milk Foods was LKR 102.71 mn of it**, 72% of that counter's own turnover.

05 TOP MOVERS

PRICE CHANGE, %

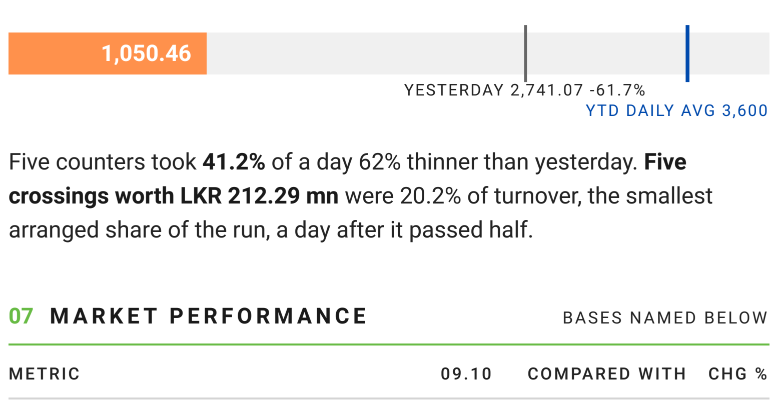
GAINERS	%	LOSERS	%
BERU	+8.0	ASPH	-16.7
LGL	+7.4	SEMB	-9.1
CITW	+6.7	SMOT	-9.0
EMER	+6.6	CALF	-8.4
KHC	+6.0	SLND	-8.1

Laugfs Gas rose **7.4% to 40.90** and was the day's fifth largest contributor on 2.604 points a rupee. S M B Finance fell 9.1% to 1.00, its first move in five sessions.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 1,050.46 MN TURNOVER



LMF	141.96	13.5%
HNB FINANCE	79.01	7.5%
JKH	77.25	7.4%
COM.CREDIT	67.68	6.4%
MULLERS	67.32	6.4%
Rest of market	617.24	58.8%

Five counters took **41.2%** of a day 62% thinner than yesterday. **Five crossings worth LKR 212.29 mn** were 20.2% of turnover, the smallest arranged share of the run, a day after it passed half.

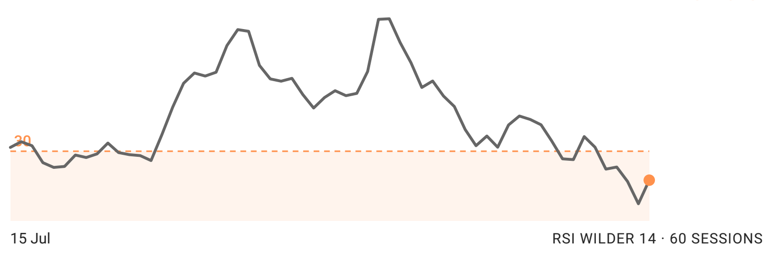
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	09.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 08.10			
All Share Price Index	20,316.91	20,234.34	0.41
S&P Sri Lanka 20	5,788.75	5,762.56	0.45
Market cap, LKR bn	7,354.72	7,329.64	0.34
Dividend yield, %	3.27	3.28	-0.30
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	1,050.46	3,600.00	-70.82
Share volume, mn	67.31	139.17	-51.63
Trades	12,144	27,090	-55.17
TODAY			
Foreign purchases, LKR mn	9.30	—	—
Foreign sales, LKR mn	166.77	—	—
Net foreign flow, LKR mn	-157.47	—	—
Traded companies	265	—	—

08 MOMENTUM AND RATES

OVERSOLD



PRIME LENDING RATE **11.16%** AWPR, week to 9 Oct · CBSL	POLICY RATE **8.75%** OPR, held 30 Sep · CBSL
TREASURY BILL **9.95%** 364 day, 7 Oct auction · PDMO	INFLATION **8.00%** CCPI year on year, September · CBSL
MARKET P/E **10.50x** 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/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
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					
Diversified financials	233.70	22.2%	7.52	0.77	2.81
Capital goods	200.10	19.0%	17.25	1.05	2.29
Food beverage & tobacco	187.69	17.9%	14.19	1.90	4.88
Banks	107.30	10.2%	4.76	0.75	4.17
Health care equipment	95.12	9.1%	9.40	1.37	0.91
Materials	92.16	8.8%	10.79	1.57	3.15
Transportation	32.36	3.1%	N/A	0.44	14.98
Consumer durables	24.01	2.3%	N/A	2.03	3.15
BEST SECTORS YEAR TO DATE					
Telecommunication services	+42%				
Commercial & professional	+19%				
Real estate management	+12%				
Transportation	+3%				
Health care equipment	-6%				

No sector took more than **22.2%** of the day's turnover, the first session of the run without one dominating. Banks still trade on **4.76x** earnings against a market on 10.50x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	+0.2%	**+12.5%**
Vietnam	VN Index	−0.1%	**−2.6%**
Pakistan	Karachi All Share	−0.1%	**−3.3%**
Sri Lanka	CSE All Share	+0.4%	**−10.2%**
EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	−1.0%	**+70.3%**
South Korea	KOSPI	−2.6%	**+57.2%**
Thailand	SET Index	+0.3%	**+25.0%**
Malaysia	FTSE Bursa KLCI	+0.5%	**−4.3%**
China	Dow Jones Shanghai	+0.1%	**−4.9%**
Philippines	PSEi Composite	+1.6%	**−5.8%**
China	SZSE Component	+0.2%	**−6.5%**
India	Nifty 50	+1.4%	**−13.8%**
India	BSE Sensex 30	+1.4%	**−14.8%**
Indonesia	JSE Composite	+0.9%	**−29.6%**
DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	+0.9%	**+37.4%**
Singapore	FTSE Singapore	−1.7%	**+20.6%**
New Zealand	NZX 50	+0.4%	**+1.5%**
Australia	S&P/ASX 200	+0.6%	**0.0%**
Hong Kong	Hang Seng	+1.8%	**−5.5%**

Thirteen of the other eighteen rose and the region turned with us. On the year Sri Lanka is still sixteenth of nineteen.

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