

DAILY MARKET WATCH

12th October 2026

Monday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,260.06

▼ -56.85 - 0.28%

ASPI YTD -10.45%

SL20 YTD -6.08%

Only 56 shares rose and 152 fell, **yet turnover still went up**: two blocks in one hotel counter did half the day's turnover.

S&P SL20

5,783.03

-0.10%

TURNOVER, LKR MN

1,193.67

+13.6% d/d

MARKET CAP, LKR BN

7,327.15

-0.37%

00 MARKET COMMENTARY

MONDAY · CLOSE OF TRADE

The All Share Price Index fell **0.28%** to **20,260.06**, giving back most of Friday's bounce and closing 26 points above the year low of 20,234.34 set on 8 October. The S&P SL20 fell 0.10% to 5,783.03. The index is 2.66% down on the month and 10.45% on the year, and the RSI reads 29.15, inside oversold.

The fall was much broader than it looks. Only 56 securities rose against 152 that fell, barely one riser for every three fallers, after 132 against 71 on Friday. The eight contributors carried here are a net -0.38 points, which leaves **-56.47** to everything else: no single name drove this, the whole list did.

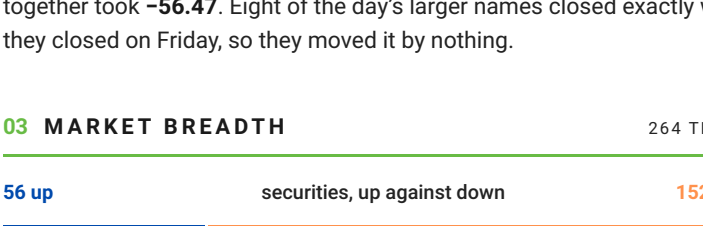
Turnover rose 13.6% to LKR 1,193.67 mn, and one counter was half of it. Ceylon Hotels Corporation traded LKR 601.60 mn, of which LKR 600.00 mn was two blocks at a flat LKR 30.00, 1,593,703 shares and 18,406,297 shares. Strip that out and everything else traded LKR 592.07 mn, which would have been the thinnest session of the run.

Foreigners were net buyers for the first time since 29 September, taking in LKR 7.25 mn after eight consecutive sessions of net selling. The amount is small and one name carries it: Ambeon Capital at LKR 5.80 mn, with Hatton National Bank at 1.84 mn behind it. Foreign activity was 0.8% of buying and 0.2% of selling.

A security that closes where it closed on Friday moves the index by nothing, and eight of today's larger names did exactly that. C T Holdings is the clearest: it last traded at LKR 546.00, up 19.00 on the day, but its published closing price stayed at 527.00, and the closing price is what the index is built on. The contributions carried above are the ones a price move accounts for.

01 MARKET BENCHMARK

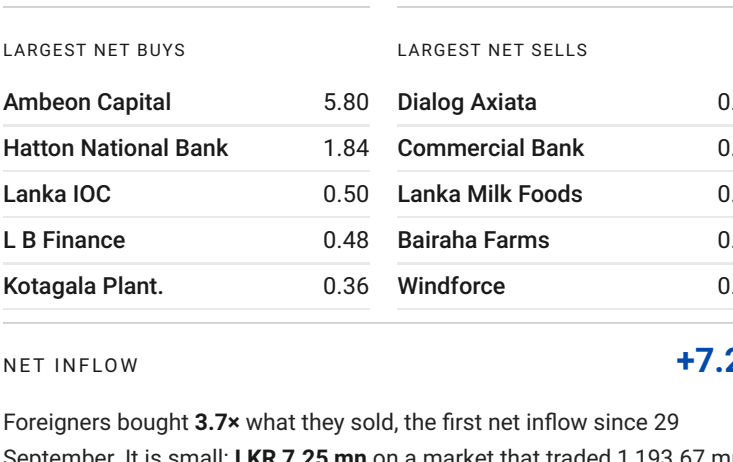
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Tuesday 6 October. The index is **1.89% lower** across the five sessions and gave back most of Friday's bounce today.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net -56.85 points. The eight shown are a net -0.38, so everything else together took **-56.47**. Eight of the day's larger names closed exactly where they closed on Friday, so they moved it by nothing.

03 MARKET BREADTH

264 TRADED

56 up securities, up against down **152 down**

264 traded companies Risers to fallers **0.37**

56 and 152 count **securities**; 264 counts **companies**, so they do not sum. Risers to fallers was **0.37**, against 1.86 on Friday.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT 9.93 **SOLD 2.67**

LARGEST NET BUYS

Ambeon Capital 5.80

Hatton National Bank 1.84

Lanka IOC 0.50

L B Finance 0.48

Kotagala Plant. 0.36

LARGEST NET SELLS

Dialog Axiata 0.55

Commercial Bank 0.51

Lanka Milk Foods 0.51

Bairaha Farms 0.51

Windforce 0.30

NET INFLOW

+7.25

Foreigners bought **3.7x** what they sold, the first net inflow since 29 September. It is small: **LKR 7.25 mn** on a market that traded 1,193.67 mn, and Ambeon Capital was 5.80 mn of it.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS % **LOSERS** %

CALF +12.1 **OFEQ -10.7**

RGEM +6.4 **SHL -8.8**

CIT +5.5 **SHOT -7.8**

SING +5.4 **MHDL -7.6**

ODEL +5.0 **CITW -6.3**

Dialog Finance rose **12.1% to 113.50**, the day's largest gain, and Office Equipment fell **10.7% to 402.75**. Only 56 securities rose against 152 that fell.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 1,193.67 MN TURNOVER 100%

CEYLON HOTELS 601.60 50.4%

COMMERCIAL BANK 46.15 3.9%

CIC 38.59 3.2%

HAYCARB 33.50 2.8%

HEMAS 28.79 2.4%

Rest of market 445.04 37.3%

YESTERDAY 1,050.46 +13.6% **YTD DAILY AVG 3,590**

Ceylon Hotels Corporation alone took 50.4% of the day's turnover. Five crossings worth LKR 677.62 mn were **56.8%** of trade, and two of them, both in that counter at a flat LKR 30.00, came to exactly LKR 600.00 mn.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC 12.10 COMPARED WITH CHG %

AGAINST THE PREVIOUS SESSION, 09.10

All Share Price Index 20,260.06 20,316.91 -0.28

S&P Sri Lanka 20 5,783.03 5,788.75 -0.10

Market cap, LKR bn 7,327.15 7,354.72 -0.37

Dividend yield, % 3.28 3.27 0.31

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn 1,193.67 3,590.00 -66.75

Share volume, mn 46.58 138.68 -66.41

Trades 12,971 27,010 -51.98

TODAY

Foreign purchases, LKR mn 9.93 — —

Foreign sales, LKR mn 2.67 — —

Net foreign flow, LKR mn +7.25 — —

Traded companies 264 — —

08 MOMENTUM AND RATES

OVERSOLD

70 29.15

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 · CBSL

INFLATION

8.00%

CCPI year on year, September · CBSL

MARKET P/E

10.46x

trailing · CSE p1.3

PRICE TO BOOK

1.21x

market · CSE p1.3

09 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

ALL ROWS HAVE GONE EX; PAYMENT DATES AHEAD

CODE COMPANY EX-DIV PAYMENT TO EX-DIV LKR/SHARE

MCPL Mahaweli Coconut 1 Oct 20 Oct -11d 3.00

ALUM Alumex 9 Oct 21 Oct -3d 0.20

KVAL Kelani Valley 9 Oct 21 Oct -3d 0.20

MGT Hayleys Fabric 9 Oct 21 Oct -3d 0.27

TPL Talawakelle 9 Oct 21 Oct -3d 0.80

DIPD Dipped Products 9 Oct 22 Oct -3d 0.96

HAYC Haycarb 9 Oct 22 Oct -3d 1.00

SINS Singer Sri Lanka 9 Oct 22 Oct -3d 0.34

ACL ACL Cables 7 Oct 26 Oct -5d 0.60

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

Consumer services 608.02 50.9% 102.17 0.87 0.57

Capital goods 114.80 9.6% 17.19 1.05 2.29

Materials 114.51 9.6% 10.70 1.55 3.18

Banks 93.18 7.8% 4.75 0.75 4.17

Diversified financials 65.90 5.5% 7.45 0.76 2.83

Food beverage & tobacco 65.06 5.5% 14.22 1.91 4.87

Real estate management 29.46 2.5% 9.12 1.10 2.20

Retailing 27.89 2.3% 8.51 1.66 2.02

BEST SECTORS YEAR TO DATE

Telecommunication services +42%

Commercial & professional +19%

Real estate management +10%

Transportation +3%

Health care equipment -5%

Consumer services took 50.9% of the day's turnover, and Ceylon Hotels Corporation was 98.9% of that group. Banks still trade on **4.75x** earnings against a market on 10.46x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET INDEX DAY YTD

FRONTIER, ASIA-PACIFIC

Bangladesh DSE Broad -0.4% +12.0%

Vietnam VN Index -0.8% -3.5%

Pakistan Karachi All Share -0.6% -4.0%

Sri Lanka CSE All Share -0.3% -10.5%

EMERGING, ASIA-PACIFIC

Taiwan Taiwan Weighted -0.0% +70.2%

South Korea KOSPI -3.6% +51.5%

Thailand SET Index -0.5% +24.6%

Malaysia FTSE Bursa KLCI +0.6% -3.7%

Philippines PSEI Composite +0.7% -5.1%

China Dow Jones Shanghai -0.9% -5.7%

China SZSE Component -2.0% -8.4%

India Nifty 50 -0.9% -14.6%

India BSE Sensex 30 -0.9% -15.7%

Indonesia JSE Composite -2.5% -31.3%

DEVELOPED, ASIA-PACIFIC

Japan Nikkei 225 -0.0% +37.1%

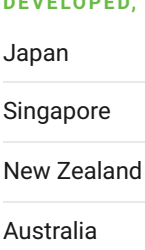
Singapore FTSE Singapore -0.3% +15.9%

New Zealand NZX 50 +0.6% +2.1%

Australia S&P/ASX 200 +0.8% +0.8%

Hong Kong Hang Seng +0.2% -5.3%

Only five of the other eighteen rose. Korea fell 3.6% and Indonesia 2.5%. On the year Sri Lanka is sixteenth of nineteen; only the two Indian indices and Indonesia sit lower.



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