

CAPITALTRUST
SECURITIES

DAILY MARKET WATCH

13th October 2026

Tuesday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,077.48

▼ -182.58 · 0.90%

ASPI YTD -11.26%

SL20 YTD -6.94%

The index set a new low for the year, **and only 36 shares rose against 179**: Dialog Axiata alone took 25.9 points off it.

S&P SL20

5,730.10

-0.92%

TURNOVER, LKR MN

1,148.75

-3.8% d/d

MARKET CAP, LKR BN

7,259.48

-0.92%

00 MARKET COMMENTARY

TUESDAY · CLOSE OF TRADE

The All Share Price Index fell **0.90%** to **20,077.48**, which is the lowest close of the year: the note's own year-low field now reads today's number. The S&P SL20 fell 0.92% to 5,730.10. The index is 3.53% down on the month and 11.26% on the year, and the RSI reads 18.80, deep inside oversold.

The fall was broad. Only 36 securities rose against 179 that fell, barely one riser for every five fallers, after 56 against 152 yesterday. Only 8 October has been worse across the five sessions, at 25 against 195. The eight contributors carried here are a net -68.11 points, leaving **-114.47** to everything else, so the selling reached well past the large caps.

Dialog Axiata took 25.92 points out of the index on its own, a seventh of the day's fall, on a close of 43.60 against 44.40. Commercial Bank and Hatton National Bank took 15.13 and 15.05 between them on falls of 1.25 and 4.25. The three are heavy enough that a move of a rupee in any of them is felt across the whole index.

Foreigners bought for a second day, a net LKR 22.58 mn against 7.25 mn yesterday, after eight consecutive sessions of selling. Lanka Milk Foods carries it: net foreign buying of LKR 20.75 mn matches, to the rupee, one of the three blocks crossed in that counter at a flat LKR 83.00. Foreign activity was 3.0% of buying and 1.0% of selling.

Turnover was thin and ordinary. LKR 1,148.75 mn is 68% below the year-to-date daily average, and only 12.1% of it was arranged, against 56.8% in yesterday's session. York Arcade is the one oddity: it fell 24.7% to 6.40 on 739 trades and still took 4.1% of the day, the third largest turnover on the board.

01 MARKET BENCHMARK

INDEX LEVELS; PATHS REBASED TO COMPARE

20,641

20,415

20,189

19,964

07 Oct

08

09

12

13 Oct

S&P SL20

5,730

-1.48%

ASPI

20,077

-2.15%

Rebased to Wednesday 7 October. The index is **2.15% lower** across the five sessions and closed today at the lowest level of the year.

02 CONTRIBUTORS TO ASPI

INDEX POINTS

+3.4

+2.9

-5.4

-6.4

-6.6

-15.1

-15.1

-25.9

-114.5

20,260.06

12 OCT CLOSE

20,077.48

13 OCT CLOSE

CCS

HHL

DOCK

OSEA

RICH

HNB

COMB

DIAL

Others

Net -182.58 points. The eight shown are a net -68.11, so everything else together took **-114.47**. Dialog Axiata alone is **25.92** of it, on a fall of 80 cents.

03 MARKET BREADTH

261 TRADED

36 up

securities, up against down

179 down

36

179

261 traded companies

Risers to fallers **0.20**

36 and 179 count **securities**; 261 counts **companies**, so they do not sum. Risers to fallers was **0.20**, against 0.37 yesterday. Only 8 October has been weaker in the five sessions, at 25 against 195.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT

34.09

SOLD

11.51

LARGEST NET BUYS

LARGEST NET SELLS

Lanka Milk Foods

20.75

East West Properties

3.34

Ambeon Capital

8.70

Colombo City

2.63

John Keells

0.72

Amana Bank

1.74

Aitken Spence

0.67

Lanka Realty Inv

1.51

CIC Holdings

0.66

Bogala Graphite

0.67

NET INFLOW

+22.58

Foreigners bought **3.0×** what they sold, a second day of net buying. **Lanka Milk Foods was LKR 20.75 mn of it**, which matches one of its three blocks to the rupee.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS

%

LOSERS

%

REEF

+9.4

YORK

-24.7

KGAL

+5.1

SING

-11.1

MADU

+4.8

LALU

-8.1

RHTL

+4.7

CSLK

-7.8

KFP

+4.5

LGIL

-7.7

York Arcade fell **24.7% to 6.40** on 739 trades, the heaviest fall and the third largest turnover of the day. Only 36 securities rose against 179 that fell.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 1,148.75 MN TURNOVER

100%

LANKA MILK FOODS

130.31

11.3%

JOHN KEELLS

81.46

7.1%

YORK ARCADE

46.66

4.1%

LANKA IOC

41.38

3.6%

AITKEN SPENCE

41.21

3.6%

Rest of market

807.73

70.3%

1,148.75

YESTERDAY 1,193.67 -3.8%

YTD DAILY AVG 3,570

Lanka Milk Foods took 11.3% of the day, and three blocks in it at a flat LKR 83.00 were 48% of that counter's own turnover. Five crossings worth LKR 138.85 mn were **12.1%** of trade, against 56.8% yesterday.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC

13.10

COMPARED WITH

CHG %

AGAINST THE PREVIOUS SESSION, 12.10

All Share Price Index

20,077.48

20,260.06

-0.90

S&P Sri Lanka 20

5,730.10

5,783.03

-0.92

Market cap, LKR bn

7,259.48

7,327.15

-0.92

Dividend yield, %

3.31

3.28

0.91

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn

1,148.75

3,570.00

-67.82

Share volume, mn

78.95

138.37

-42.94

Trades

18,646

26,970

-30.86

TODAY

Foreign purchases, LKR mn

34.09

—

—

Foreign sales, LKR mn

11.51

—

—

Net foreign flow, LKR mn

+22.58

—

—

Traded companies

261

—

—

08 MOMENTUM AND RATES

OVERSOLD

70

30

17 Jul

RSI WILDER 14 · 60 SESSIONS

18.80

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

10.37x

trailing · CSE p1.3

PRICE TO BOOK

1.20x

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

-12d

3.00

ALUM

Alumex

9 Oct

21 Oct

-4d

0.20

KVAL

Kelani Valley

9 Oct

21 Oct

-4d

0.20

MGT

Hayleys Fabric

9 Oct

21 Oct

-4d

0.27

TPL

Talawakelle

9 Oct

21 Oct

-4d

0.80

DIPD

Dipped Products

9 Oct

22 Oct

-4d

0.96

HAYC

Haycarb

9 Oct

22 Oct

-4d

1.00

SINS

Singer Sri Lanka

9 Oct

22 Oct

-4d

0.34

ACL

ACL Cables

7 Oct

26 Oct

-6d

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

Food beverage & tobacco

256.78

22.4%

14.18

1.90

4.88

Capital goods

224.06

19.5%

16.97

1.03

2.32

Banks

156.74

13.6%

4.72

0.74

4.20

Diversified financials

104.31

9.1%

7.36

0.75

2.87

Real estate management

94.54

8.2%

8.85

1.07

2.26

Materials

86.55

7.5%

10.57

1.53

3.22

Energy

42.26

3.7%

13.11

0.88

0.00

Consumer services

41.92

3.6%

101.00

0.86

0.57

BEST SECTORS YEAR TO DATE

Telecommunication services

+40%

Commercial & professional

+17%

Real estate management

+7%

Transportation

+2%

Food beverage & tobacco

-6%

Food beverage and tobacco took 22.4% of the day's turnover and capital goods 19.5%, so no single group dominated. Banks still trade on **4.72x** earnings against a market on 10.37x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET

INDEX

DAY

YTD

FRONTIER, ASIA-PACIFIC

Bangladesh

DSE Broad

-0.8%

+11.1%

Vietnam

VN Index

-0.1%

-3.7%

Pakistan

Karachi All Share

+0.2%

-4.1%

Sri Lanka

CSE All Share

-0.9%

-11.3%

EMERGING, ASIA-PACIFIC

Taiwan

Taiwan Weighted

-1.8%

+67.1%

South Korea

KOSPI

-5.5%

+43.2%

Thailand

SET Index

-0.4%

+24.8%

Malaysia

FTSE Bursa KLCI

+0.3%

-3.4%

Philippines

PSEi Composite

-0.7%

-5.8%

China

Dow Jones Shanghai

-0.1%

-5.9%

China

SZSE Component

-0.3%

-8.7%

India

Nifty 50

+1.4%

-13.2%

India

BSE Sensex 30

+1.0%

-14.7%

Indonesia

JSE Composite

-0.5%

-31.7%

DEVELOPED, ASIA-PACIFIC

Japan

Nikkei 225

-0.1%

+34.8%

Singapore

FTSE Singapore

+0.4%

+16.3%

New Zealand

NZX 50

-0.6%

+1.5%

Australia

S&P/ASX 200

0.0%

+0.8%

Hong Kong

Hang Seng

+0.3%

-5.0%

Only six of the other eighteen rose. Korea fell 5.5% and Taiwan 1.8%, while both Indian indices gained. On the year Sri Lanka is sixteenth of nineteen.

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