CAPITALTRUST SECURITIES

DAILY MARKET WATCH

15th October 2026

Thursday

COLOMBO STOCK EXCHANGE | CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,971.15

▲+175.09 · 0.88% | ASPI YTD −11.73% | SL20 YTD −7.44%

Most shares rose today, 164 against 57, **but foreigners sold a net LKR 76 mn**: LKR 72.6 mn of it was Dialog Axiata.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,699.02 +0.40%	1,498.99 -22.2% d/d	7,214.16 +0.82%

00 MARKET COMMENTARY

THURSDAY · CLOSE OF TRADE

The All Share Price Index rose **0.88%** to **19,971.15**, recovering part of yesterday's fall but still below 20,000. The S&P SL20 rose 0.40% to 5,699.02. The index is 4.04% down on the month and 11.73% on the year, and the RSI reads 24.86, still inside oversold.

The turn in breadth was sharp. 164 securities rose against 57 that fell, almost three risers for every faller, a day after one riser for every ten. The eight contributors carried here are a net +74.32 points, leaving **+100.77** to everything else, so the rise was broad rather than led.

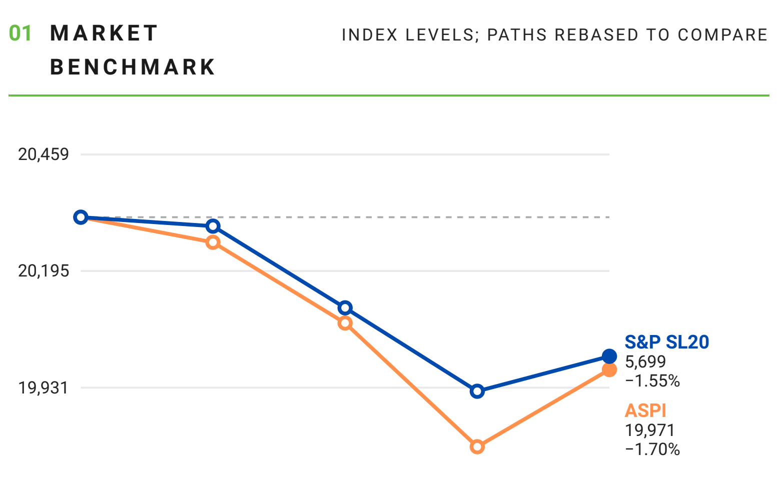
Carson Cumberbatch's rise alone accounted for 33.87 points, a fifth of the day's gain, on a jump of LKR 44.50 to 700.00, a day after it fell 33.50. Distilleries added 15.76 and Commercial Bank 9.08.

Foreigners sold into the rise, 2.7 times what they bought, for a net outflow of LKR 76.18 mn. Dialog Axiata was LKR 72.56 mn of it, 95% of the whole net outflow and three quarters of Dialog's own turnover of LKR 96.70 mn. John Keells Holdings was a further LKR 28.09 mn of selling.

Turnover fell 22% to LKR 1,498.99 mn, 58% below the year-to-date daily average, and 33.0% of it was arranged in seven crossings. One Ceylon Tobacco block of 100,000 shares at LKR 1,750.00 was LKR 175.00 mn, most of that counter's trade.

01 MARKET BENCHMARK

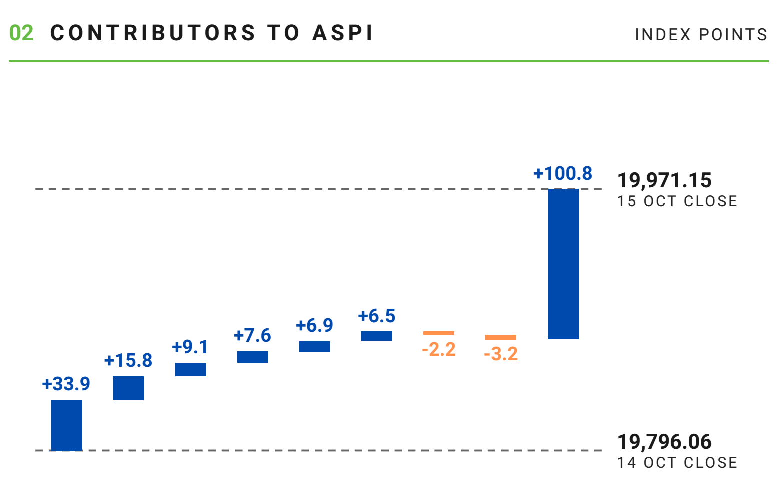
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Friday 9 October. The index is **1.70% lower** across the five sessions, and today recovered part of yesterday's fall.

02 CONTRIBUTORS TO ASPI

INDEX POINTS

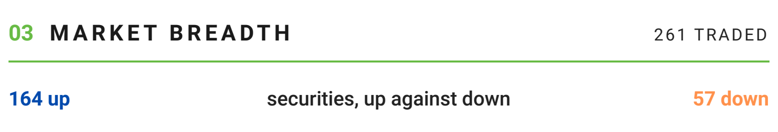


Net +175.09 points. The eight shown are a net +74.32, so everything else together added **+100.77**. Carson Cumberbatch alone is **33.87** of it.

03 MARKET BREADTH

261 TRADED

164 up | securities, up against down | **57 down**



261 traded companies

Risers to fallers **2.88**

164 and 57 count **securities**; 261 counts **companies**, so they do not sum. Risers to fallers was **2.88**, the strongest of the five sessions shown, a day after the weakest.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT **44.82** | SOLD **121.00**

LARGEST NET BUYS		LARGEST NET SELLS	
Maskeliya Plant.	12.38	**Dialog Axiata**	72.56
Commercial Credit	6.78	**John Keells**	28.09
Ambeon Capital	5.61	**Digital Mobility**	11.24
Hatton National Bank	4.88	**Teejay Lanka**	1.49
Commercial Bank	4.77	**Hayleys Fibre**	1.41

NET OUTFLOW **-76.18**

Foreigners sold **2.7×** what they bought. **Dialog Axiata was LKR 72.56 mn** of the net selling, 95% of the day's whole net outflow and three quarters of Dialog's own turnover.

05 TOP MOVERS

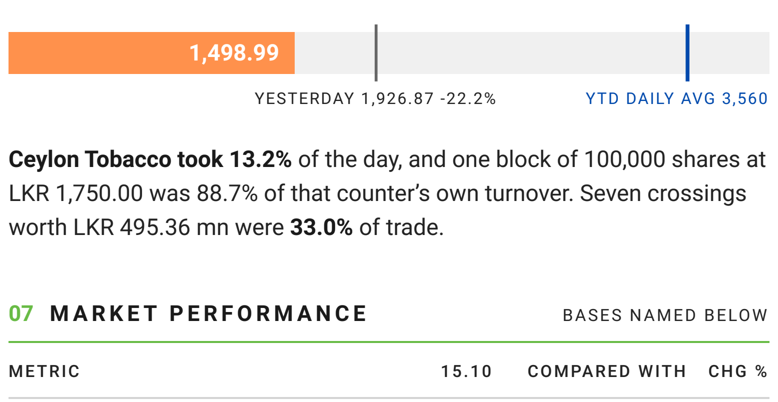
PRICE CHANGE, %

GAINERS	%	LOSERS	%
SEMB.X	+50.0	BOPL	-6.0
YORK	+17.5	LVEN	-3.9
SEMB	+11.1	MDL	-3.5
EMER	+10.6	TAJ	-3.5
MSL	+10.5	KVAL	-3.3

York Arcade rose **17.5% to 6.70** a day after falling, and Bogawantalawa fell **6.0% to 64.30**, the day's largest fall. 164 securities rose against 57.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



🟧 CEYLON TOBACCO	197.34	13.2%
🟦 DIALOG	96.70	6.5%
🟨 SINGER SRI LANKA	93.59	6.2%
🟥 SAMPATH	93.40	6.2%
🟦 COM.CREDIT	90.79	6.1%
⬜ Rest of market	927.17	61.9%

Ceylon Tobacco took 13.2% of the day, and one block of 100,000 shares at LKR 1,750.00 was 88.7% of that counter's own turnover. Seven crossings worth LKR 495.36 mn were **33.0%** of trade.

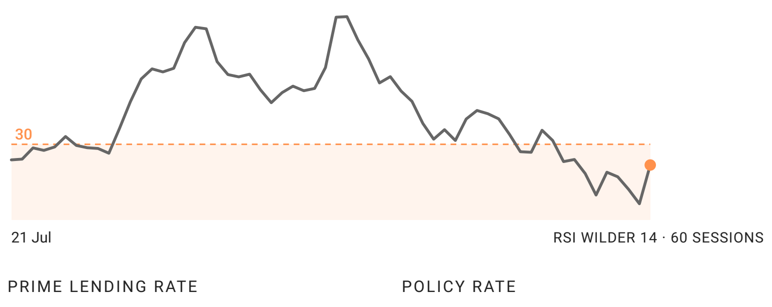
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	15.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 14.10			
All Share Price Index	19,971.15	19,796.06	0.88
S&P Sri Lanka 20	5,699.02	5,676.43	0.40
Market cap, LKR bn	7,214.16	7,155.40	0.82
Dividend yield, %	3.33	3.36	-0.89
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	1,498.99	3,560.00	-57.89
Share volume, mn	51.56	137.73	-62.56
Trades	14,459	26,880	-46.21
TODAY			
Foreign purchases, LKR mn	44.82	—	—
Foreign sales, LKR mn	121.00	—	—
Net foreign flow, LKR mn	-76.18	—	—
Traded companies	261	—	—

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, 14 Oct auction · PDMO

INFLATION
8.00%
CCPI year on year, September · CBSL

MARKET P/E
10.30x
trailing · CSE p1.3

PRICE TO BOOK
1.19x
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	−14d	3.00
ALUM	Alumex	9 Oct	21 Oct	−6d	0.20
KVAL	Kelani Valley	9 Oct	21 Oct	−6d	0.20
MGT	Hayleys Fabric	9 Oct	21 Oct	−6d	0.27
TPL	Talawakelle	9 Oct	21 Oct	−6d	0.80
DIPD	Dipped Products	9 Oct	22 Oct	−6d	0.96
HAYC	Haycarb	9 Oct	22 Oct	−6d	1.00
SINS	Singer Sri Lanka	9 Oct	22 Oct	−6d	0.34
ACL	ACL Cables	7 Oct	26 Oct	−8d	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	377.58	25.2%	14.12	1.89	4.90
Diversified financials	206.45	13.8%	7.36	0.75	2.87
Retailing	196.21	13.1%	8.33	1.62	2.07
Capital goods	185.65	12.4%	16.89	1.03	2.33
Banks	185.37	12.4%	4.70	0.74	4.22
Materials	100.86	6.7%	10.60	1.54	3.21
Telecommunication	99.94	6.7%	12.36	2.74	4.04
Consumer services	49.29	3.3%	99.50	0.85	0.58
BEST SECTORS YEAR TO DATE					
Telecommunication services	+36%				
Commercial & professional	+12%				
Real estate management	+7%				
Transportation	+2%				
Health care equipment	-7%				

Food beverage and tobacco took 25.2% of the day's turnover, and Ceylon Tobacco was over half of that group. Banks trade on **4.70x** earnings against a market on 10.30x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	+0.4%	**+11.6%**
Pakistan	Karachi All Share	+0.7%	**−3.5%**
Vietnam	VN Index	−0.4%	**−4.9%**
Sri Lanka	CSE All Share	+0.9%	**−11.7%**
EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	−3.4%	**+62.2%**
South Korea	KOSPI	−7.6%	**+31.8%**
Thailand	SET Index	−0.4%	**+24.6%**
Malaysia	FTSE Bursa KLCI	−0.2%	**−3.4%**
Philippines	PSEi Composite	+0.8%	**−6.4%**
China	Dow Jones Shanghai	−1.9%	**−8.7%**
India	Nifty 50	+1.4%	**−12.2%**
China	SZSE Component	−2.4%	**−12.6%**
India	BSE Sensex 30	+2.0%	**−12.9%**
Indonesia	JSE Composite	−1.6%	**−32.4%**
DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	−2.0%	**+28.1%**
Singapore	FTSE Singapore	+0.2%	**+16.6%**
New Zealand	NZX 50	+0.5%	**+2.1%**
Australia	S&P/ASX 200	−0.1%	**+0.1%**
Hong Kong	Hang Seng	−1.0%	**−6.1%**

Sri Lanka's 0.9% rise was the third best of the nineteen, behind the two Indian indices, on a day Korea fell 7.6%. On the year it is now fifteenth of nineteen.

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