CAPITAL TRUST
SECURITIES

DAILY MARKET WATCH

16th October 2026

Friday

COLOMBO STOCK EXCHANGE · CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,185.05

▲ +213.90 · 1.07% · ASPI YTD −10.78% · SL20 YTD −6.80%

The index is back above 20,000, **with 184 shares up and just 33 down**: Dialog Axiata's rise alone was 49 of the 214 points gained.

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,738.83	1,143.23	7,293.28
+0.70%	−23.7% d/d	+1.10%

00 MARKET COMMENTARY

FRIDAY · CLOSE OF TRADE

The All Share Price Index rose **1.07%** to **20,185.05**, back above 20,000 two sessions after its first close below that level this year. Over those two sessions it has recovered 388.99 points, or 1.96%. The S&P SL20 rose 0.70% to 5,738.83. The index is 3.02% down on the month and 10.78% on the year, and the RSI reads 34.66, back above the oversold line at 30.

The rise was broad for a second day. 184 securities rose against 33 that fell, more than five risers for every faller, after almost three yesterday. The eight contributors carried here are a net +94.82 points, leaving **+119.08** to everything else.

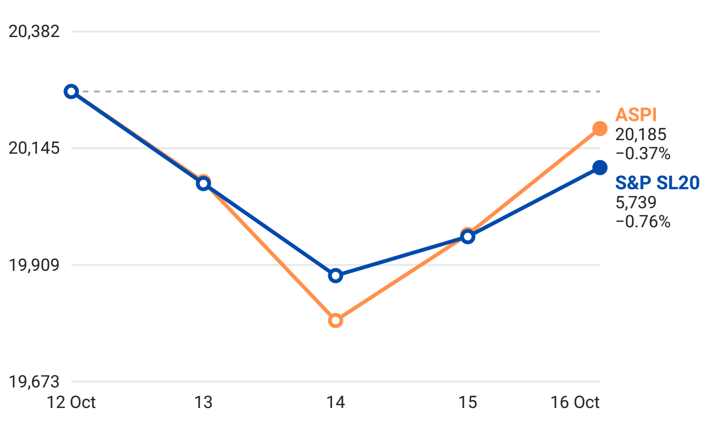
Dialog Axiata's rise alone accounted for 48.58 points, more than a fifth of the day's gain, on a close of 44.00 against 42.50. Distilleries added 26.26 and Cold Stores 14.31. Carsons gave back 16.36 points after yesterday's jump.

Turnover fell 24% to LKR 1,143.23 mn, 68% below the year-to-date daily average. CIC Holdings took 16.1% of it, mostly in its non-voting shares, and Commercial Bank 11.7%, though Commercial Bank closed unchanged at 198.00. Only 10.7% was arranged, in five crossings.

Foreigners were small net sellers: they sold 1.2 times what they bought, for a net outflow of LKR 8.71 mn. R I L Property was the largest net sale at LKR 12.96 mn and Dialog Axiata the second at LKR 8.43 mn.

01 MARKET BENCHMARK

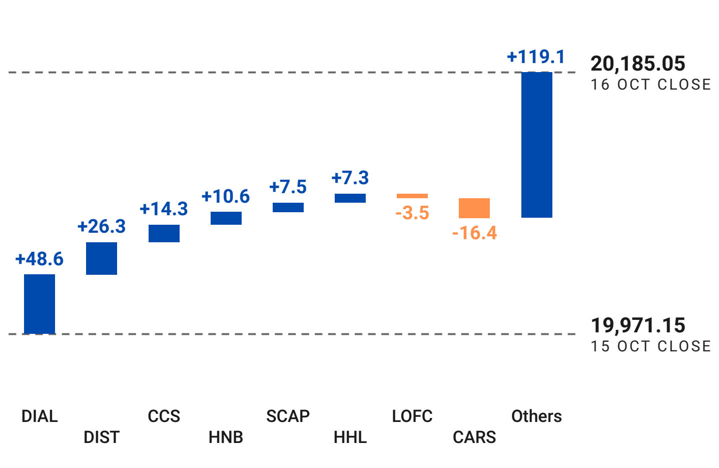
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Monday 12 October. The index is **0.37% lower** across the five sessions, having recovered most of the week's fall in the last two.

02 CONTRIBUTORS TO ASPI

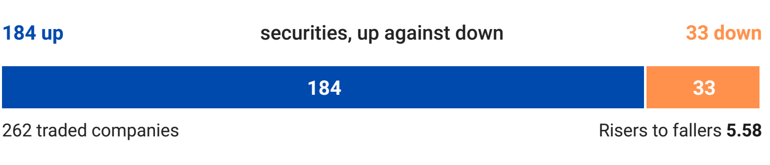
INDEX POINTS



Net +213.90 points. The eight shown are a net +94.82, so everything else together added **+119.08**. Dialog Axiata alone is **48.58** of it.

03 MARKET BREADTH

262 TRADED



184 and 33 count **securities**; 262 counts **companies**, so they do not sum. Risers to fallers was **5.58**, the strongest of the five sessions shown and a second strong day running.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT	46.09	SOLD	54.80
LARGEST NET BUYS		**LARGEST NET SELLS**	
E B Creasy & Co	5.04	R I L Property	12.96
Hayleys	4.60	Dialog Axiata	8.43
Aitken Spence	3.34	Digital Mobility	4.06
Browns Inv	2.04	Amana Bank	2.21
Chevron Lubricants	2.04	Janashakthi Insurance	0.60

NET OUTFLOW · -8.71

Foreigners sold **1.2×** what they bought, a small net outflow of LKR 8.71 mn. R I L Property was the largest net sale at **LKR 12.96 mn**.

05 TOP MOVERS

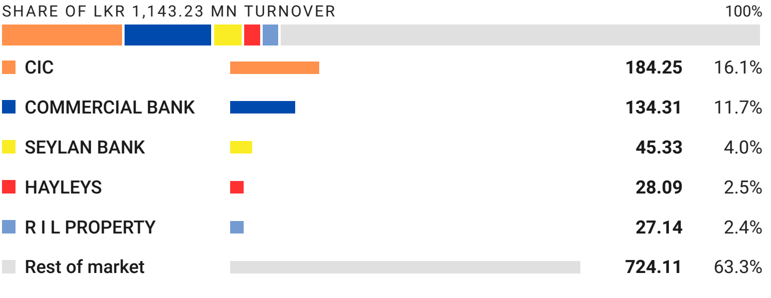
PRICE CHANGE, %

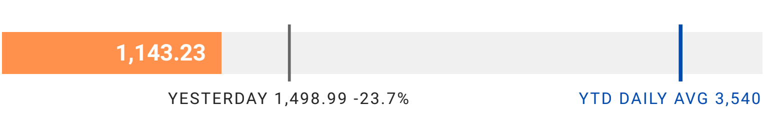
GAINERS	%	LOSERS	%
ASPH	+20.0	EDEN	-3.3
CRL	+17.2	EMER	-3.2
SCAP	+15.4	CARS	-3.1
ACME	+14.7	NEH	-3.1
KPHL	+10.3	MAL.X	-3.0

Softlogic Capital rose **15.4% to 9.00** and added 7.54 points. The largest fall was Eden Hotel Lanka, **3.3% to 8.70**. 184 securities rose against 33.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN





CIC Holdings took 16.1% of the day, over two thirds of it in its non-voting shares. Five crossings were **10.7%** of trade, two of them in CIC at LKR 26.00.

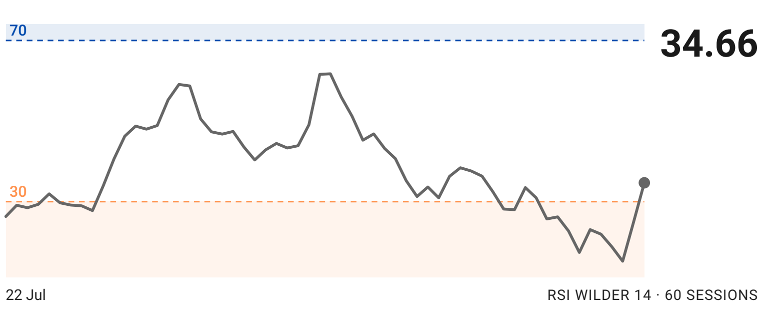
07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	16.10	COMPARED WITH	CHG %
AGAINST THE PREVIOUS SESSION, 15.10			
All Share Price Index	20,185.05	19,971.15	1.07
S&P Sri Lanka 20	5,738.83	5,699.02	0.70
Market cap, LKR bn	7,293.28	7,214.16	1.10
Dividend yield, %	3.30	3.33	-0.90
AGAINST THE YEAR-TO-DATE DAILY AVERAGE			
Turnover, LKR mn	1,143.23	3,540.00	-67.71
Share volume, mn	68.44	137.37	-50.18
Trades	15,863	26,820	-40.85
TODAY			
Foreign purchases, LKR mn	46.09	—	—
Foreign sales, LKR mn	54.80	—	—
Net foreign flow, LKR mn	-8.71	—	—
Traded companies	262	—	—

08 MOMENTUM AND RATES

NEUTRAL



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
10.42x
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	−15d	3.00
ALUM	Alumex	9 Oct	21 Oct	−7d	0.20
KVAL	Kelani Valley	9 Oct	21 Oct	−7d	0.20
MGT	Hayleys Fabric	9 Oct	21 Oct	−7d	0.27
TPL	Talawakelle	9 Oct	21 Oct	−7d	0.80
DIPD	Dipped Products	9 Oct	22 Oct	−7d	0.96
HAYC	Haycarb	9 Oct	22 Oct	−7d	1.00
SINS	Singer Sri Lanka	9 Oct	22 Oct	−7d	0.34
ACL	ACL Cables	7 Oct	26 Oct	−9d	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					
Materials	273.33	23.9%	10.75	1.56	3.16
Banks	236.30	20.7%	4.73	0.74	4.19
Capital goods	148.84	13.0%	17.01	1.04	2.32
Diversified financials	133.72	11.7%	7.44	0.76	2.84
Real estate management	81.64	7.1%	9.06	1.10	2.21
Food beverage & tobacco	73.91	6.5%	14.20	1.91	4.87
Retailing	38.63	3.4%	8.41	1.64	2.05
Insurance	26.11	2.3%	7.53	0.97	5.01
BEST SECTORS YEAR TO DATE					
Telecommunication services	+40%				
Commercial & professional	+13%				
Real estate management	+10%				
Transportation	+2%				
Health care equipment	-5%				

Materials took 23.9% of the day's turnover, two thirds of it CIC Holdings, and banks 20.7%. Banks trade on **4.73x** earnings against a market on 10.42x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
FRONTIER, ASIA-PACIFIC			
Bangladesh	DSE Broad	+0.4%	**+12.1%**
Pakistan	Karachi All Share	+0.3%	**−3.3%**
Vietnam	VN Index	+0.4%	**−4.4%**
Sri Lanka	CSE All Share	+1.1%	**−10.8%**
EMERGING, ASIA-PACIFIC			
Taiwan	Taiwan Weighted	+0.5%	**+62.9%**
South Korea	KOSPI	+2.0%	**+34.5%**
Thailand	SET Index	−0.2%	**+24.9%**
Malaysia	FTSE Bursa KLCI	−1.0%	**−4.3%**
Philippines	PSEi Composite	+2.1%	**−4.5%**
China	Dow Jones Shanghai	+0.2%	**−8.6%**
India	Nifty 50	+0.5%	**−11.5%**
India	BSE Sensex 30	+0.3%	**−12.5%**
China	SZSE Component	−0.1%	**−12.7%**
Indonesia	JSE Composite	−11.3%	**−39.8%**
DEVELOPED, ASIA-PACIFIC			
Japan	Nikkei 225	+0.3%	**+30.1%**
Singapore	FTSE Singapore	−0.3%	**+16.2%**
New Zealand	NZX 50	−0.6%	**+1.5%**
Australia	S&P/ASX 200	+1.0%	**+1.1%**
Hong Kong	Hang Seng	+0.5%	**−5.6%**

Sri Lanka's 1.1% rise was the third best of the nineteen, behind the Philippines and Korea, on a day Indonesia fell 11.3%. On the year it is fifteenth of nineteen.

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SECURITIES

42, Sir Mohammed Macan Markar Mawatha, Colombo 03
0705 666 777
inquiries@capitaltrust.lk

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