

DAILY MARKET WATCH

19th October 2026

Monday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

20,059.42

▼ -125.63 · 0.62%

ASPI YTD -11.34%

SL20 YTD -7.42%

Thinnest turnover since 28 September, **as the index gives back a third of its two-day rebound**

S&P SL20	TURNOVER, LKR MN	MARKET CAP, LKR BN
5,700.75	680.32	7,251.09
-0.66%	-40.5% d/d	-0.58%

00 MARKET COMMENTARY

MONDAY · CLOSE OF TRADE

The All Share Price Index fell **0.62%** to **20,059.42**, giving back 125.63 of the 388.99 points it recovered on Thursday and Friday. The S&P SL20 fell 0.66% to 5,700.75. The index is 3.62% down on the month and 11.34% on the year, and the RSI reads 32.02, just above the oversold line at 30.

The fall was broad. 141 securities fell against 59 that rose, after more than five risers for every faller on Friday. The eight contributors carried here are a net -51.60 points, leaving **-74.03** to everything else.

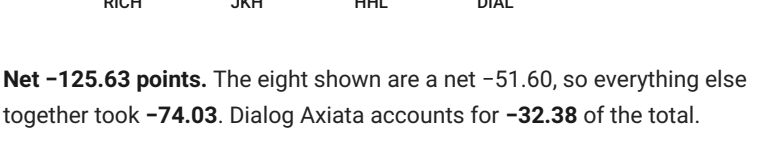
Dialog Axiata's fall alone accounted for 32.38 points, about a quarter of the day's loss, on a close of 43.00 against 44.00. Hatton National Bank took 10.62 and Hemas 5.86. Commercial Bank, Richard Pieris and Cold Stores added 8.47 between them.

Turnover fell 40% to LKR 680.32 mn, the lowest since 28 September and 81% below the year-to-date daily average. John Keells took 16.5% of it and Sampath Bank 16.0%. 18.3% was arranged, in four crossings, three of them in Sampath.

Foreigners were net sellers: they sold 2.4 times what they bought, for a net outflow of LKR 39.29 mn. Hatton National Bank was the largest net sale at LKR 37.47 mn and Aitken Spence the second at LKR 16.38 mn.

01 MARKET BENCHMARK

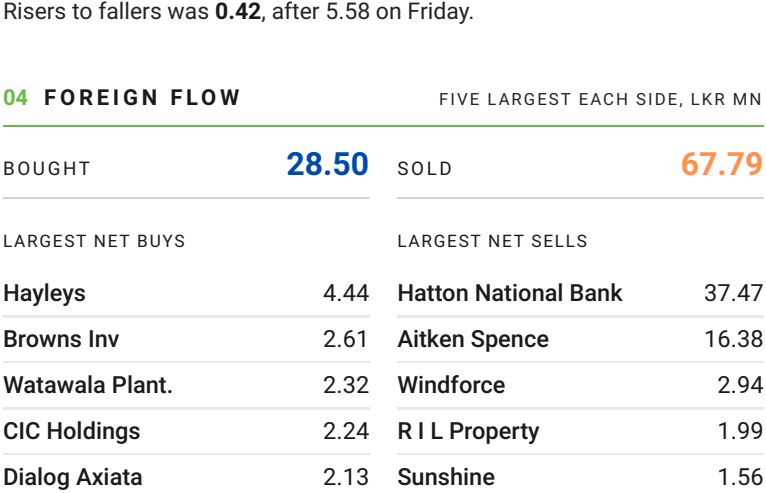
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Tuesday 13 October. The index is **0.09% lower** across the five sessions: Wednesday's low, two days of recovery, and today's fall.

02 CONTRIBUTORS TO ASPI

INDEX POINTS

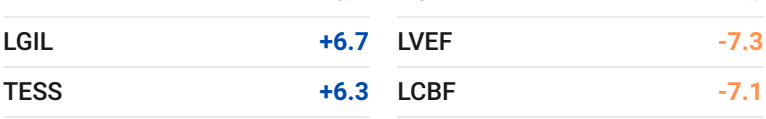


Net -125.63 points. The eight shown are a net -51.60, so everything else together took **-74.03**. Dialog Axiata accounts for **-32.38** of the total.

03 MARKET BREADTH

263 TRADED

59 up securities, up against down **141 down**



263 traded companies Risers to fallers **0.42**

59 and 141 count **securities**; 263 counts **companies**, so they do not sum. Risers to fallers was **0.42**, after 5.58 on Friday.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT **28.50** SOLD **67.79**

LARGEST NET BUYS LARGEST NET SELLS

Hayleys	4.44	Hatton National Bank	37.47
Browns Inv	2.61	Aitken Spence	16.38
Watawala Plant.	2.32	Windforce	2.94
CIC Holdings	2.24	R I L Property	1.99
Dialog Axiata	2.13	Sunshine	1.56

NET OUTFLOW **-39.29**

Foreigners sold **2.4x** what they bought, for a net outflow of LKR 39.29 mn. Hatton National Bank was the largest net sale at **LKR 37.47 mn**.

05 TOP MOVERS

PRICE CHANGE, %

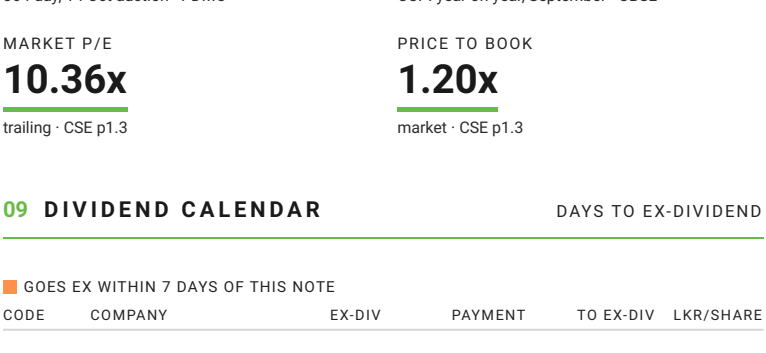
GAINERS	%	LOSERS	%
PEG	+14.0	OFEQ	-19.0
MULL	+8.3	ASPH	-16.7
BRR	+8.2	ASIY	-7.8
LGIL	+6.7	LVEF	-7.3
TESS	+6.3	LCBF	-7.1

Pegasus Hotels rose **14.0% to 19.50** on LKR 0.03 mn of turnover. The largest fall was Office Equipment, **19.0% to 326.25**. 141 securities fell against 59.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 680.32 MN TURNOVER



YESTERDAY 1,143.23 -40.5% YTD DAILY AVG 3,530

John Keells and Sampath Bank took 32.5% of the day between them. Four crossings were **18.3%** of trade; three were in Sampath at LKR 140.00.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC 19.10 COMPARED WITH CHG %

AGAINST THE PREVIOUS SESSION, 16.10

All Share Price Index	20,059.42	20,185.05	-0.62
S&P Sri Lanka 20	5,700.75	5,738.83	-0.66
Market cap, LKR bn	7,251.09	7,293.28	-0.58
Dividend yield, %	3.32	3.30	0.61

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn	680.32	3,530.00	-80.73
Share volume, mn	33.57	136.83	-75.47
Trades	13,302	26,750	-50.27

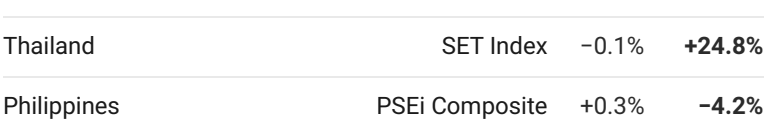
TODAY

Foreign purchases, LKR mn	28.50	—	—
Foreign sales, LKR mn	67.79	—	—
Net foreign flow, LKR mn	-39.29	—	—
Traded companies	263	—	—

08 MOMENTUM AND RATES

NEUTRAL

70 32.02



PRIME LENDING RATE **11.11%** POLICY RATE **8.75%**

AWPR, week to 16 Oct · CBSL OPR, held 30 Sep · CBSL

TREASURY BILL **9.95%** INFLATION **8.00%**

364 day, 14 Oct auction · PDMO CCPI year on year, September · CBSL

MARKET P/E **10.36x** PRICE TO BOOK **1.20x**

trailing · CSE p1.3 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
LION	Lion Brewery	20 Oct	6 Nov	+1d	40.30
LCBF	Lanka Credit & Bus.	26 Oct	12 Nov	+7d	0.20
MCPL	Mahaweli Coconut	1 Oct	20 Oct	-18d	3.00
ALUM	Alumex	9 Oct	21 Oct	-10d	0.20
KVAL	Kelani Valley	9 Oct	21 Oct	-10d	0.20
MGT	Hayleys Fabric	9 Oct	21 Oct	-10d	0.27
TPL	Talawakelle	9 Oct	21 Oct	-10d	0.80
DIPD	Dipped Products	9 Oct	22 Oct	-10d	0.96
HAYC	Haycarb	9 Oct	22 Oct	-10d	1.00
SINS	Singer Sri Lanka	9 Oct	22 Oct	-10d	0.34
ACL	ACL Cables	7 Oct	26 Oct	-12d	0.60
HPL	Hatton Plantations	14 Oct	2 Nov	-5d	1.00

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

Banks	188.71	27.7%	4.72	0.74	4.20
Capital goods	177.78	26.1%	16.85	1.03	2.34
Materials	75.66	11.1%	10.68	1.55	3.18
Diversified financials	57.64	8.5%	7.38	0.75	2.86
Food beverage & tobacco	55.50	8.2%	14.20	1.91	4.87
Real estate management	27.53	4.0%	8.95	1.08	2.24
Retailing	21.85	3.2%	8.32	1.62	2.07
Utilities	20.43	3.0%	18.07	1.89	0.88

Banks took 27.7% of the day's turnover, more than half of it Sampath, and capital goods 26.1%, most of it John Keells. Banks trade on **4.72x** earnings against a market on 10.36x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET INDEX DAY YTD

FRONTIER, ASIA-PACIFIC

Bangladesh	DSE Broad	-0.5%	+11.5%
Pakistan	Karachi All Share	0.0%	-3.6%
Vietnam	VN Index	-0.9%	-5.3%
Sri Lanka	CSE All Share	-0.6%	-11.3%

EMERGING, ASIA-PACIFIC

Taiwan	Taiwan Weighted	-0.8%	+61.3%
South Korea	KOSPI	+1.8%	+36.9%
Thailand	SET Index	-0.1%	+24.8%
Philippines	PSEi Composite	+0.3%	-4.2%
Malaysia	FTSE Bursa KLCI	-0.7%	-5.0%
China	Dow Jones Shanghai	+0.1%	-8.5%
India	Nifty 50	-1.2%	-12.5%
China	SZSE Component	+0.1%	-12.6%
India	BSE Sensex 30	-1.2%	-13.4%
Indonesia	JSE Composite	-3.9%	-42.4%

DEVELOPED, ASIA-PACIFIC

Japan	Nikkei 225	+1.6%	+29.2%
Singapore	FTSE Singapore	+0.2%	+16.1%
Australia	S&P/ASX 200	+0.4%	+1.5%
New Zealand	NZX 50	-0.7%	+0.8%
Hong Kong	Hang Seng	+0.5%	-5.6%

Sri Lanka fell 0.6% on a mixed day for the region: eight of the other eighteen rose and nine fell, with Indonesia down 3.9%. On the year it is fifteenth of nineteen.

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