

DAILY MARKET WATCH

21<sup>st</sup> October 2026

Wednesday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,927.30

▼ -56.48 · 0.28%

ASPI YTD -11.92%

SL20 YTD -8.13%

Two Fortress Resorts crossings were half the day's turnover, **as the index fell for a third session**

S&P SL20

5,656.91

-0.43%

TURNOVER, LKR MN

1,457.80

+71.8% d/d

MARKET CAP, LKR BN

7,186.78

-0.52%

00 MARKET COMMENTARY

WEDNESDAY · CLOSE OF TRADE

The All Share Price Index fell **0.28%** to **19,927.30**, a third day of losses that leaves it 1.28% below Friday's close. The S&P SL20 fell 0.43% to 5,656.91. The index is 4.26% down on the month and 11.92% on the year, and the RSI reads 29.40, below the oversold line at 30.

**The fall was broad for a third day.** 131 securities fell against 58 that rose. The eight contributors carried here are a net -15.30 points, leaving **-41.18** to everything else.

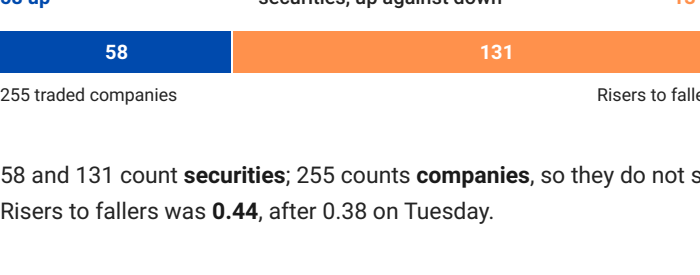
**Commercial Bank's fall of 1.00 to 197.00 accounted for 12.11 points**, Carsons 9.14 and CIC Holdings 6.57. Distilleries added 14.02 on a rise of 0.80 to 52.80, the largest single contribution of the day.

**Turnover rose 72% to LKR 1,457.80 mn**, still 58% below the year-to-date daily average. Two crossings in Fortress Resorts, 34.75 mn shares at LKR 21.00, were 50.1% of it, and all six crossings 58.6%.

**Foreigners were close to balanced:** they sold 1.02 times what they bought, for a net outflow of LKR 1.04 mn. Hatton National Bank was the largest net sale at LKR 33.90 mn and Aitken Spence the largest net buy at LKR 16.62 mn.

01 MARKET BENCHMARK

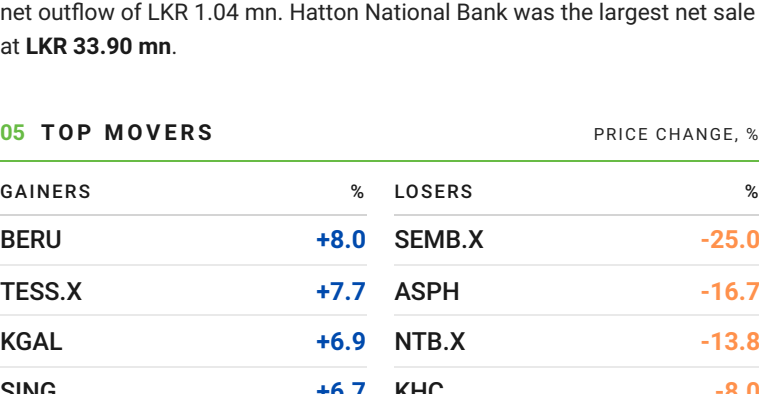
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Thursday 15 October. The index is **0.22% below** that close and 1.28% below Friday's, after three days of losses.

02 CONTRIBUTORS TO ASPI

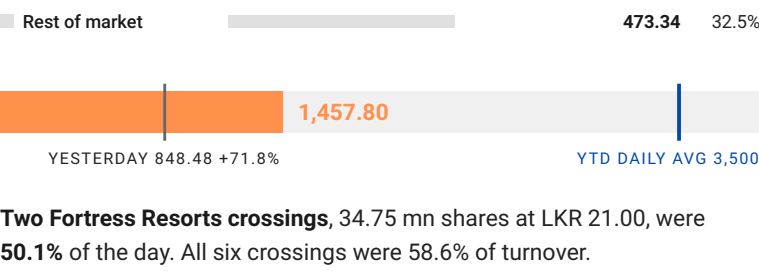
INDEX POINTS



**Net -56.48 points.** The eight shown are a net -15.30, so everything else together took **-41.18**. Commercial Bank accounts for **-12.11** of the total.

03 MARKET BREADTH

255 TRADED



58 and 131 count **securities**; 255 counts **companies**, so they do not sum. Risers to fallers was **0.44**, after 0.38 on Tuesday.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

| BOUGHT                   | 47.42 | SOLD                 | 48.45 |
|--------------------------|-------|----------------------|-------|
| LARGEST NET BUYS         |       | LARGEST NET SELLS    |       |
| Aitken Spence            | 16.62 | Hatton National Bank | 33.90 |
| Softlogic Life Insurance | 8.64  | ACL Cables           | 4.72  |
| Ambeon Capital           | 7.03  | Commercial Bank      | 4.44  |
| John Keells              | 6.51  | Lanka Credit & Bus.  | 2.03  |
| E B Creasy & Co          | 4.76  | Chevron Lubricants   | 0.85  |

**NET OUTFLOW -1.04**

05 TOP MOVERS

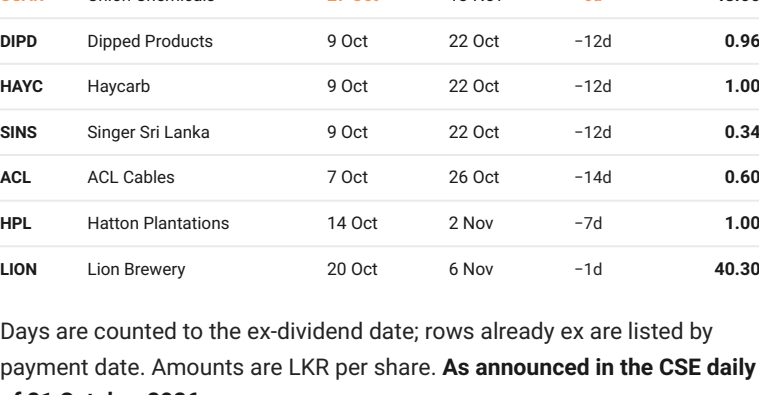
PRICE CHANGE, %

| GAINERS | %    | LOSERS | %     |
|---------|------|--------|-------|
| BERU    | +8.0 | SEMB.X | -25.0 |
| TESS.X  | +7.7 | ASPH   | -16.7 |
| KGAL    | +6.9 | NTB.X  | -13.8 |
| SING    | +6.7 | KHC    | -8.0  |
| MARA    | +6.5 | CITW   | -6.7  |

Beruwala Resorts rose **8.0% to 2.70**. The largest fall was S M B Finance's non-voting shares, **25.0% to 0.30**, a single tick. 131 securities fell against 58.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



**Two Fortress Resorts crossings**, 34.75 mn shares at LKR 21.00, were **50.1%** of the day. All six crossings were 58.6% of turnover.

07 MARKET PERFORMANCE

BASES NAMED BELOW

| METRIC | 21.10 | COMPARED WITH | CHG % |
|--------|-------|---------------|-------|
|--------|-------|---------------|-------|

AGAINST THE PREVIOUS SESSION, 20.10

|                       |           |           |       |
|-----------------------|-----------|-----------|-------|
| All Share Price Index | 19,927.30 | 19,983.78 | -0.28 |
| S&P Sri Lanka 20      | 5,656.91  | 5,681.51  | -0.43 |
| Market cap, LKR bn    | 7,186.78  | 7,224.22  | -0.52 |
| Dividend yield, %     | 3.35      | 3.33      | 0.60  |

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

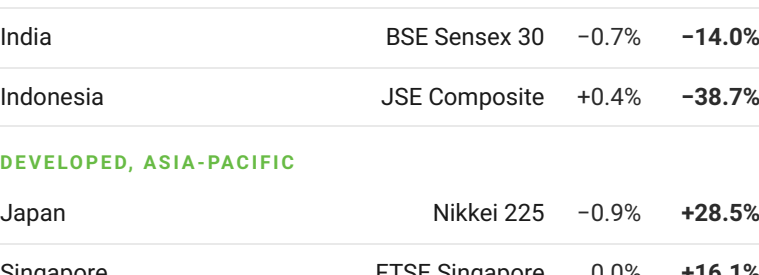
|                  |          |          |        |
|------------------|----------|----------|--------|
| Turnover, LKR mn | 1,457.80 | 3,500.00 | -58.35 |
| Share volume, mn | 65.25    | 135.88   | -51.98 |
| Trades           | 11,517   | 26,600   | -56.70 |

TODAY

|                           |       |   |   |
|---------------------------|-------|---|---|
| Foreign purchases, LKR mn | 47.42 | — | — |
| Foreign sales, LKR mn     | 48.45 | — | — |
| Net foreign flow, LKR mn  | -1.04 | — | — |
| Traded companies          | 255   | — | — |

08 MOMENTUM AND RATES

OVERSOLD



PRIME LENDING RATE

11.11%

AWPR, week to 16 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

10.26x

trailing · CSE p1.3

PRICE TO BOOK

1.19x

market · CSE p1.3

09 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

| CODE | COMPANY | EX-DIV | PAYMENT | TO EX-DIV | LKR/SKARE |
|------|---------|--------|---------|-----------|-----------|
|------|---------|--------|---------|-----------|-----------|

Days are counted to the ex-dividend date; rows already ex are listed by payment date. Amounts are LKR per share. **As announced in the CSE daily of 21 October 2026.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

| INDUSTRY GROUP | TURNOVER | SHARE | PER | PBV | DY |
|----------------|----------|-------|-----|-----|----|
|----------------|----------|-------|-----|-----|----|

BY TURNOVER TODAY, LKR MN

|                         |        |       |       |      |      |
|-------------------------|--------|-------|-------|------|------|
| Consumer services       | 738.50 | 50.7% | 98.93 | 0.84 | 0.58 |
| Banks                   | 273.86 | 18.8% | 4.67  | 0.74 | 4.25 |
| Capital goods           | 128.81 | 8.8%  | 16.68 | 1.02 | 2.36 |
| Food beverage & tobacco | 73.39  | 5.0%  | 14.16 | 1.90 | 4.89 |
| Diversified financials  | 68.44  | 4.7%  | 7.16  | 0.73 | 2.95 |
| Materials               | 48.44  | 3.3%  | 10.60 | 1.54 | 3.21 |
| Health care             | 27.60  | 1.9%  | 9.38  | 1.37 | 0.91 |
| Real estate management  | 23.65  | 1.6%  | 8.90  | 1.08 | 2.25 |

BEST SECTORS YEAR TO DATE

|                            |      |
|----------------------------|------|
| Telecommunication services | +37% |
| Commercial & professional  | +14% |
| Real estate management     | +8%  |
| Transportation             | +1%  |
| Health care equipment      | -6%  |

**Consumer services took 50.7%** of the day's turnover, almost all of it Fortress Resorts, and banks 18.8%. Banks trade on **4.67x** earnings against a market on 10.26x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

| MARKET | INDEX | DAY | YTD |
|--------|-------|-----|-----|
|--------|-------|-----|-----|

FRONTIER, ASIA-PACIFIC

|            |                   |       |        |
|------------|-------------------|-------|--------|
| Bangladesh | DSE Broad         | +0.5% | +12.0% |
| Vietnam    | VN Index          | +2.8% | -2.6%  |
| Pakistan   | Karachi All Share | 0.0%  | -4.3%  |
| Sri Lanka  | CSE All Share     | -0.3% | -11.9% |

EMERGING, ASIA-PACIFIC

|             |                    |       |        |
|-------------|--------------------|-------|--------|
| Taiwan      | Taiwan Weighted    | +0.9% | +61.3% |
| South Korea | KOSPI              | +3.3% | +36.1% |
| Thailand    | SET Index          | -0.2% | +23.2% |
| Philippines | PSEi Composite     | +0.3% | -3.8%  |
| Malaysia    | FTSE Bursa KLCI    | +0.2% | -4.6%  |
| China       | Dow Jones Shanghai | -0.4% | -8.7%  |
| India       | Nifty 50           | -0.7% | -13.0% |
| China       | SZSE Component     | -0.8% | -13.5% |
| India       | BSE Sensex 30      | -0.7% | -14.0% |
| Indonesia   | JSE Composite      | +0.4% | -38.7% |

DEVELOPED, ASIA-PACIFIC

|             |                |       |        |
|-------------|----------------|-------|--------|
| Japan       | Nikkei 225     | -0.9% | +28.5% |
| Singapore   | FTSE Singapore | 0.0%  | +16.1% |
| New Zealand | NZX 50         | +1.0% | +1.6%  |
| Australia   | S&P/ASX 200    | +0.2% | +1.3%  |
| Hong Kong   | Hang Seng      | -0.9% | -7.7%  |

**Sri Lanka fell 0.3% on a day nine of the other eighteen markets rose**, Korea by 3.3% and Vietnam by 2.8%. On the year it is fifteenth of nineteen.

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