

DAILY MARKET WATCH

22<sup>nd</sup> October 2026

Thursday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,717.92

▼ -209.38 · 1.05%

ASPI YTD -12.85%

SL20 YTD -8.75%

The index falls 1.05% to a new low for the year, **its fourth loss in a row**

S&P SL20

5,618.48  
-0.68%

TURNOVER, LKR MN

1,101.74  
-24.4% d/d

MARKET CAP, LKR BN

7,123.23  
-0.88%

00 MARKET COMMENTARY

THURSDAY · CLOSE OF TRADE

The All Share Price Index fell **1.05%** to **19,717.92**, a new low for the year and a fourth straight loss that leaves it 2.31% below Friday's close. The S&P SL20 fell 0.68% to 5,618.48, also a low for the year. The index is 5.26% down on the month and 12.85% on the year, and the RSI reads 25.66, below the oversold line at 30.

**The fall was broad.** 162 securities fell against 40 that rose, the weakest ratio of the last five sessions. The eight contributors carried here are a net -77.73 points, leaving **-131.65** to everything else.

**Distilleries' fall of 1.90 to 50.90 accounted for 33.29 points,** Hatton National Bank 15.94 and Dialog Axiata 12.96. Ceylon Tobacco added 2.12, the largest positive contribution of the day.

**Turnover fell 24% to LKR 1,101.74 mn,** 68% below the year-to-date daily average. John Keells took 14.3% of it and Sampath Bank 11.8%, and John Keells closed unchanged at 17.60.

**Foreigners were net buyers:** they bought 1.8 times what they sold, for a net inflow of LKR 39.22 mn. Commercial Credit was the largest net buy at LKR 62.82 mn, most of its LKR 70.34 mn of turnover, and Lanka IOC the largest net sale at LKR 12.93 mn.

01 MARKET BENCHMARK

INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Friday 16 October. The index is **2.31% lower** across the five sessions, with a loss on each of the last four.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



**Net -209.38 points.** The eight shown are a net -77.73, so everything else together took **-131.65**. Distilleries accounts for **-33.29** of the total.

03 MARKET BREADTH

255 TRADED

**40 up** securities, up against down **162 down**



40 and 162 count **securities**; 255 counts **companies**, so they do not sum. Risers to fallers was **0.25**, the weakest of the five sessions shown.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

**BOUGHT 90.26** **SOLD 51.04**

**LARGEST NET BUYS** **LARGEST NET SELLS**

**Commercial Credit 62.82** **Lanka IOC 12.93**

**Maskeliya Plant. 10.00** **Hatton National Bank 11.75**

**John Keells 8.50** **Chevron Lubricants 9.17**

**Ambeon Capital 4.24** **ACL Cables 7.69**

**Prime Lands Resid. 0.68** **Lanka Hospitals 2.99**

**NET INFLOW 39.22**

Foreigners bought **1.8×** what they sold, for a net inflow of LKR 39.22 mn. Commercial Credit was the largest net buy at **LKR 62.82 mn**.

05 TOP MOVERS

PRICE CHANGE, %

**GAINERS** **%** **LOSERS** **%**

**KHC +7.8** **SHAW -9.4**

**CITW +7.1** **AGST.X -9.4**

**HPWR +5.1** **MCPL -8.5**

**MFPE +4.3** **SHOT -8.4**

**ECL +4.2** **WLTH -8.4**

Kandy Hotels rose **7.8% to 11.10**, recovering most of Wednesday's fall. The largest fall was Lee Hedges, **9.4% to 261.50**. 162 securities fell against 40.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

**SHARE OF LKR 1,101.74 MN TURNOVER** **100%**

**JKH 157.39 14.3%**

**SAMPATH 130.08 11.8%**

**SUNSHINE HOLDING 102.61 9.3%**

**COM.CREDIT 70.34 6.4%**

**COMMERCIAL BANK 38.85 3.5%**

**Rest of market 602.47 54.7%**

**1,101.74** **YTD DAILY AVG 3,490**

**John Keells and Sampath Bank took 26.1%** of the day between them, and Sunshine Holdings 9.3%. John Keells closed unchanged at 17.60.

07 MARKET PERFORMANCE

BASES NAMED BELOW

**METRIC 22.10 COMPARED WITH CHG %**

**AGAINST THE PREVIOUS SESSION, 21.10**

**All Share Price Index 19,717.92 19,927.30 -1.05**

**S&P Sri Lanka 20 5,618.48 5,656.91 -0.68**

**Market cap, LKR bn 7,123.23 7,186.78 -0.88**

**Dividend yield, % 3.38 3.35 0.90**

**AGAINST THE YEAR-TO-DATE DAILY AVERAGE**

**Turnover, LKR mn 1,101.74 3,490.00 -68.43**

**Share volume, mn 64.29 135.51 -52.56**

**Trades 15,637 26,540 -41.08**

**TODAY**

**Foreign purchases, LKR mn 90.26 — —**

**Foreign sales, LKR mn 51.04 — —**

**Net foreign flow, LKR mn 39.22 — —**

**Traded companies 255 — —**

08 MOMENTUM AND RATES

OVERSOLD

**70 25.66**



**PRIME LENDING RATE 11.11%**

**AWPR, week to 16 Oct · CBSL**

**TREASURY BILL 9.95%**

**364 day, 14 Oct auction · PDMO**

**MARKET P/E 10.17x**

**trailing · CSE p1.3**

**POLICY RATE 8.75%**

**OPR, held 30 Sep · CBSL**

**INFLATION 8.00%**

**CCPI year on year, September · CBSL**

**PRICE TO BOOK 1.18x**

**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**

**LCBF Lanka Credit & Bus. 26 Oct 12 Nov +4d 0.20**

**UCAR Union Chemicals 27 Oct 13 Nov +5d 48.00**

**ACL ACL Cables 7 Oct 26 Oct -15d 0.60**

**HPL Hatton Plantations 14 Oct 2 Nov -8d 1.00**

**LION Lion Brewery 20 Oct 6 Nov -2d 40.30**

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 22 October 2026.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

**INDUSTRY GROUP TURNOVER SHARE PER PBV DY**

**BY TURNOVER TODAY, LKR MN**

**Banks 249.91 22.7% 4.64 0.73 4.28**

**Capital goods 240.14 21.8% 16.56 1.01 2.38**

**Food beverage & tobacco 189.83 17.2% 14.05 1.89 4.93**

**Diversified financials 127.62 11.6% 7.08 0.72 2.98**

**Materials 81.83 7.4% 10.46 1.52 3.25**

**Real estate management 40.95 3.7% 8.67 1.05 2.31**

**Energy 33.05 3.0% 12.88 0.87 0.00**

**Consumer services 25.06 2.3% 98.47 0.84 0.59**

**BEST SECTORS YEAR TO DATE**

**Telecommunication services +35%**

**Commercial & professional +13%**

**Real estate management +4%**

**Transportation +1%**

**Health care equipment -7%**

**Banks took 22.7%** of the day's turnover, about half of it Sampath, and capital goods 21.8%, nearly two thirds of it John Keells. Banks trade on **4.64x** earnings against a market on 10.17x.

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 +1.2% -1.4%**

**Pakistan Karachi All Share -1.0% -4.8%**

**Sri Lanka CSE All Share -1.1% -12.8%**

**EMERGING, ASIA-PACIFIC**

**Taiwan Taiwan Weighted -1.7% +59.2%**

**South Korea KOSPI -3.5% +31.3%**

**Thailand SET Index +0.5% +24.2%**

**Malaysia FTSE Bursa KLCI +0.4% -4.3%**

**Philippines PSEi Composite -0.7% -4.5%**

**China Dow Jones Shanghai -1.9% -10.4%**

**India Nifty 50 -0.5% -13.1%**

**India BSE Sensex 30 -0.6% -14.0%**

**China SZSE Component -3.0% -16.0%**

**Indonesia JSE Composite +1.1% -37.7%**

**DEVELOPED, ASIA-PACIFIC**

**Japan Nikkei 225 -2.1% +25.3%**

**Singapore FTSE Singapore -0.2% +15.8%**

**New Zealand NZX 50 -0.1% +1.5%**

**Australia S&P/ASX 200 -0.4% +0.9%**

**Hong Kong Hang Seng -3.0% -10.5%**

**Sri Lanka's 1.1% fall came on a weak day for the region:** thirteen of the other eighteen markets fell, Korea by 3.5%. On the year it is fifteenth of nineteen.