

DAILY MARKET WATCH

23rd October 2026

Friday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,684.91

▼ -33.01 · 0.17%

ASPI YTD -12.99%

SL20 YTD -8.83%

The index ends the week at a new low for the year, **its fifth fall in a row**

S&P SL20

5,613.63

-0.09%

TURNOVER, LKR MN

825.15

-25.1% d/d

MARKET CAP, LKR BN

7,107.02

-0.23%

00 MARKET COMMENTARY

FRIDAY · CLOSE OF TRADE

The All Share Price Index fell **0.17%** to **19,684.91**, a fifth straight loss and another low for the year, and ended the week 2.48% lower. The S&P SL20 fell 0.09% to 5,613.63, also a low for the year. The index is 5.42% down on the month and 12.99% on the year, and the RSI reads 25.12, below the oversold line at 30.

Fallers led again, but by less. 129 securities fell against 73 that rose, the best ratio of the week. The eight contributors carried here are a net -5.82 points, leaving **-27.19** to everything else.

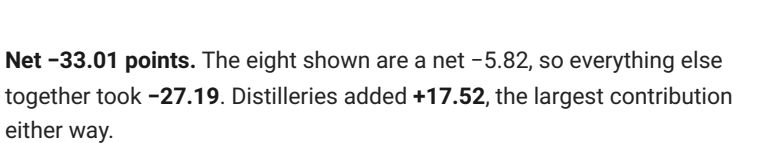
Dialog Axiata's fall of 0.30 to 42.10 accounted for 9.72 points, Panasian Power 7.35 on a 13.7% fall, and Hayleys 5.36. Distilleries added 17.52 on a rise of 1.00 to 51.90, the largest contribution of the day.

Turnover fell 25% to LKR 825.15 mn, 76% below the year-to-date daily average. Sampath Bank took 16.8% of it, and 84% of Sampath's LKR 138.81 mn was arranged in three crossings at LKR 138.00. Seven crossings in all were 28.2% of the day.

Foreigners were net buyers for a second day: they bought 3.1 times what they sold, for a net inflow of LKR 37.59 mn. Dialog Axiata was the largest net buy at LKR 22.92 mn and Lanka Hospitals the largest net sale at LKR 11.96 mn.

01 MARKET BENCHMARK

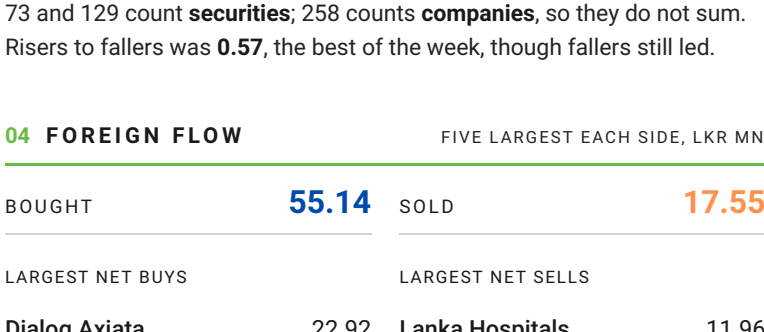
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Monday 19 October. The index is 1.87% below that close, and fell in all five sessions of the week, **2.48%** in all.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net -33.01 points. The eight shown are a net -5.82, so everything else together took **-27.19**. Distilleries added **+17.52**, the largest contribution either way.

03 MARKET BREADTH

258 TRADED

73 up securities, up against down **129 down**

258 traded companies Risers to fallers **0.57**

73 and 129 count **securities**; 258 counts **companies**, so they do not sum. Risers to fallers was **0.57**, the best of the week, though fallers still led.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT 55.14 **SOLD 17.55**

LARGEST NET BUYS **LARGEST NET SELLS**

Dialog Axiata 22.92 **Lanka Hospitals** 11.96

John Keells 10.55 **Hemas** 0.72

Aitken Spence 5.80 **Amana Bank** 0.17

Tokyo Cement Co 1.78 **Haycarb** 0.16

Melstacorp 1.77 **ACL Plastics** 0.06

NET INFLOW 37.59

Foreigners bought **3.1×** what they sold, for a net inflow of LKR 37.59 mn. Dialog Axiata was the largest net buy at **LKR 22.92 mn**.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS % **LOSERS** %

MBSL.P **+7.8** **PAP** **-13.7**

UDPL **+6.8** **RGEM** **-9.2**

BPPL **+5.2** **AINS** **-7.5**

AGST.X **+5.2** **BERU** **-7.4**

RHTL **+5.1** **EML** **-7.3**

Merchant Bank's preference shares rose **7.8% to 9.70**. The largest fall was Panasian Power, **13.7% to 10.10**, on LKR 39.63 mn of turnover. 129 securities fell against 73.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 825.15 MN TURNOVER 100%

SAMPATH **138.81** 16.8%

GRAIN ELEVATORS **72.51** 8.8%

LAUGFS GAS **43.19** 5.2%

PANASIAN POWER **39.63** 4.8%

JKH **31.78** 3.9%

Rest of market **499.23** 60.5%

825.15 **YTD DAILY AVG 3,480**

Sampath Bank took 16.8% of the day, 84% of it in three crossings at LKR 138.00. Seven crossings in all were 28.2% of turnover.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC **23.10** **COMPARED WITH** **CHG %**

AGAINST THE PREVIOUS SESSION, 22.10

All Share Price Index **19,684.91** 19,717.92 **-0.17**

S&P Sri Lanka 20 **5,613.63** 5,618.48 **-0.09**

Market cap, LKR bn **7,107.02** 7,123.23 **-0.23**

Dividend yield, % **3.38** 3.38 **0.00**

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn **825.15** 3,480.00 **-76.29**

Share volume, mn **31.51** 134.99 **-76.66**

Trades **13,305** 26,470 **-49.74**

TODAY

Foreign purchases, LKR mn **55.14** — —

Foreign sales, LKR mn **17.55** — —

Net foreign flow, LKR mn **37.59** — —

Traded companies **258** — —

08 MOMENTUM AND RATES

OVERSOLD



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, 21 Oct auction · PDMO **CCPI year on year, September · CBSL**

MARKET P/E 10.15x **PRICE TO BOOK 1.17x**

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**

LCBF Lanka Credit & Bus. **26 Oct** 12 Nov **+3d** **0.20**

UCAR Union Chemicals **27 Oct** 13 Nov **+4d** **48.00**

ACL ACL Cables 7 Oct 26 Oct **-16d** **0.60**

HPL Hatton Plantations 14 Oct 2 Nov **-9d** **1.00**

LION Lion Brewery 20 Oct 6 Nov **-3d** **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 23 October 2026.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

INDUSTRY GROUP **TURNOVER** **SHARE** **PER** **PBV** **DY**

BY TURNOVER TODAY, LKR MN

Banks **181.18** 22.0% 4.63 0.73 4.28

Food beverage & tobacco **138.46** 16.8% 14.07 1.89 4.92

Capital goods **117.84** 14.3% 16.51 1.01 2.39

Diversified financials **90.08** 10.9% 7.06 0.72 2.99

Utilities **55.08** 6.7% 17.24 1.81 0.92

Materials **53.63** 6.5% 10.49 1.52 3.24

Energy **45.46** 5.5% 12.91 0.87 0.00

Real estate management **42.18** 5.1% 8.60 1.04 2.33

BEST SECTORS YEAR TO DATE

Telecommunication services **+34%**

Commercial & professional **+11%**

Real estate management **+3%**

Transportation **0%**

Food beverage & tobacco **-7%**

Banks took 22.0% of the day's turnover, three quarters of it Sampath, and food, beverage and tobacco 16.8%. Banks traded on **4.63x** earnings against a market on 10.15x.

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** **+0.7%** **-0.6%**

Pakistan **Karachi All Share** **-0.6%** **-5.4%**

Sri Lanka **CSE All Share** **-0.2%** **-13.0%**

EMERGING, ASIA-PACIFIC

Taiwan **Taiwan Weighted** **-1.8%** **+59.0%**

South Korea **KOSPI** **+0.3%** **+31.7%**

Thailand **SET Index** **+0.4%** **+24.1%**

Malaysia **FTSE Bursa KLCI** **+0.2%** **-4.1%**

Philippines **PSEi Composite** **-0.9%** **-5.4%**

China **Dow Jones Shanghai** **+1.5%** **-9.1%**

China **SZSE Component** **+2.8%** **-13.7%**

India **Nifty 50** **-0.8%** **-13.9%**

India **BSE Sensex 30** **-0.3%** **-14.3%**

Indonesia **JSE Composite** **+0.9%** **-37.1%**

DEVELOPED, ASIA-PACIFIC

Japan **Nikkei 225** **+1.1%** **+24.7%**

Singapore **FTSE Singapore** **+0.6%** **+16.5%**

New Zealand **NZX 50** **-0.1%** **+1.4%**

Australia **S&P/ASX 200** **0.0%** **+0.9%**

Hong Kong **Hang Seng** **+0.7%** **-9.9%**

Sri Lanka's 0.2% fall came on a firmer day for the region: eleven of the other eighteen markets rose, Shenzhen by 2.8%. On the year it is fifteenth of nineteen.

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