

DAILY MARKET WATCH

26th October 2026

Monday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,640.56

▼ -44.35 · 0.23%

ASPI YTD -13.19%

SL20 YTD -9.02%

The index sets another low for the year, **its sixth fall in a row**

S&P SL20

5,601.87

-0.21%

TURNOVER, LKR MN

666.31

-19.2% d/d

MARKET CAP, LKR BN

7,093.15

-0.20%

00 MARKET COMMENTARY

MONDAY · CLOSE OF TRADE

The All Share Price Index fell **0.23%** to **19,640.56**, a sixth straight loss and another low for the year. The S&P SL20 fell 0.21% to 5,601.87, also a low for the year. The index is 5.63% down on the month and 13.19% on the year, and the RSI reads 24.37, below the oversold line at 30.

Breadth improved again, though fallers still led. 123 securities fell against 80 that rose, a ratio of 0.65 and the best in six sessions. The eight contributors carried here are a net -15.55 points, leaving **-28.80** to everything else.

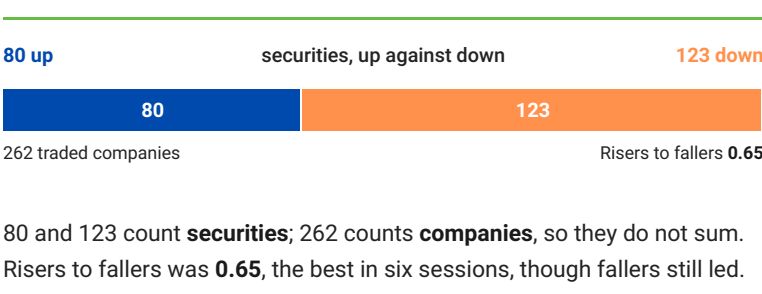
Commercial Bank's fall of 0.75 to 195.25 accounted for 9.08 points, Distilleries 5.26 on a fall of 0.30 to 51.60, and Hayleys 4.46. Singer Sri Lanka added 4.73 on a rise of 1.20 to 70.00, the largest positive contribution of the day.

Turnover fell 19% to LKR 666.31 mn, 81% below the year-to-date daily average. Commercial Bank took 15.6% of it and Access Engineering 12.5%. Three crossings in the two came to LKR 133.59 mn, 20.0% of the day.

Foreigners turned net sellers after two days of net buying: they sold 2.2 times what they bought, for a net outflow of LKR 6.59 mn. Sampath Bank was the largest net sale at LKR 3.86 mn.

01 MARKET BENCHMARK

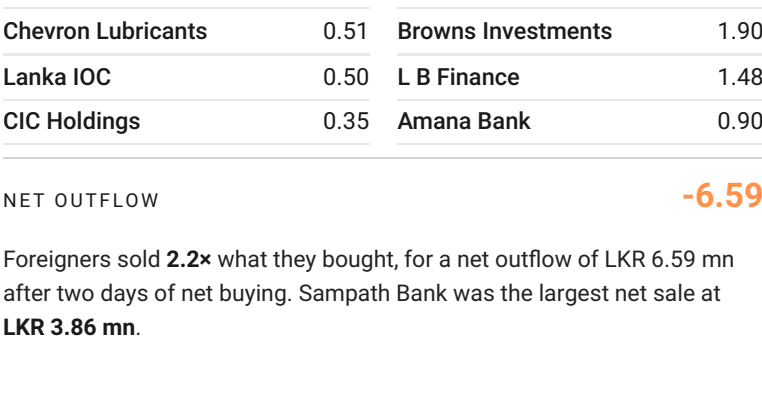
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Tuesday 20 October. The index is 1.72% below that close, and has fallen for **six sessions** in a row.

02 CONTRIBUTORS TO ASPI

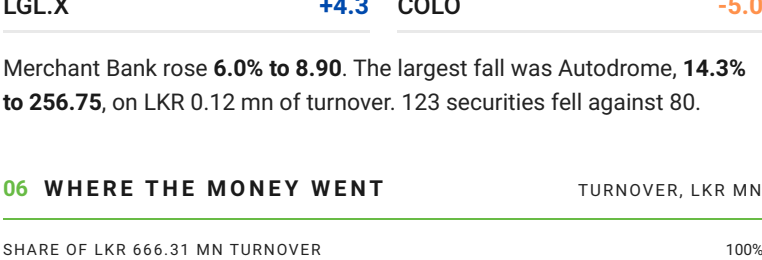
INDEX POINTS



Net -44.35 points. The eight shown are a net -15.55, so everything else together took **-28.80**. Commercial Bank took **-9.08**, the largest contribution either way.

03 MARKET BREADTH

262 TRADED



80 and 123 count **securities**; 262 counts **companies**, so they do not sum. Risers to fallers was **0.65**, the best in six sessions, though fallers still led.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT 5.67 **SOLD 12.25**

LARGEST NET BUYS **LARGEST NET SELLS**

Colombo Land & Development	2.08	Sampath Bank	3.86
Ambeon Capital	0.83	Lanka Credit & Bus.	2.12
Chevron Lubricants	0.51	Browns Investments	1.90
Lanka IOC	0.50	L B Finance	1.48
CIC Holdings	0.35	Amana Bank	0.90

NET OUTFLOW -6.59

Foreigners sold **2.2x** what they bought, for a net outflow of LKR 6.59 mn after two days of net buying. Sampath Bank was the largest net sale at **LKR 3.86 mn**.

05 TOP MOVERS

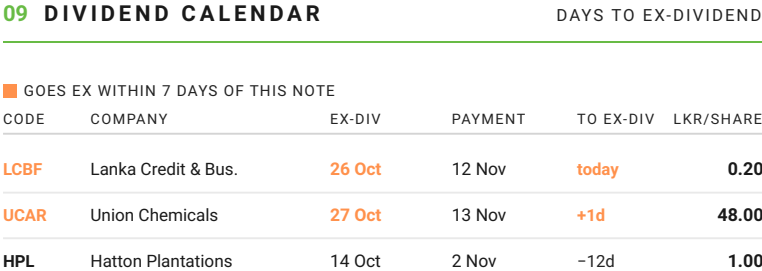
PRICE CHANGE, %

GAINERS	%	LOSERS	%
MBSL	+6.0	AUTO	-14.4
BRR	+5.5	TESS.X	-7.1
SMOT	+5.4	CALF	-6.9
OFEQ	+4.7	KGAL	-6.8
LGL.X	+4.3	COLO	-5.0

Merchant Bank rose **6.0% to 8.90**. The largest fall was Autodrome, **14.3% to 256.75**, on LKR 0.12 mn of turnover. 123 securities fell against 80.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN



Commercial Bank took 15.6% of the day, 57% of it in two crossings at LKR 195.00. Access Engineering's LKR 83.00 mn was 90% one crossing at 74.50.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC	26.10	COMPARED WITH	CHG %
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AGAINST THE PREVIOUS SESSION, 23.10

All Share Price Index	19,640.56	19,684.91	-0.23
S&P Sri Lanka 20	5,601.87	5,613.63	-0.21
Market cap, LKR bn	7,093.15	7,107.02	-0.20
Dividend yield, %	3.39	3.38	0.30

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

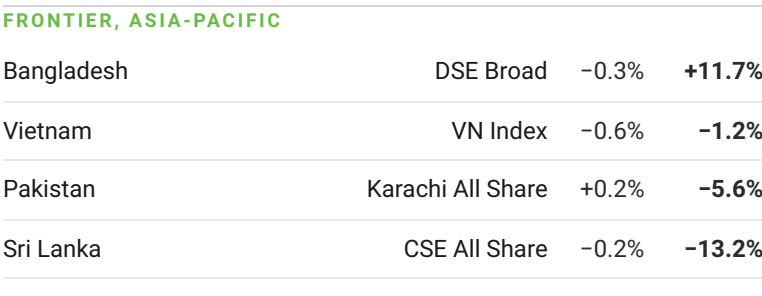
Turnover, LKR mn	666.31	3,460.00	-80.74
Share volume, mn	29.70	134.46	-77.91
Trades	14,001	26,410	-46.99

TODAY

Foreign purchases, LKR mn	5.67	—	—
Foreign sales, LKR mn	12.25	—	—
Net foreign flow, LKR mn	-6.59	—	—
Traded companies	262	—	—

08 MOMENTUM AND RATES

OVERSOLD



PRIME LENDING RATE	POLICY RATE
10.93%	8.75%
AWPR, week to 23 Oct · CBSL	OPR, held 30 Sep · CBSL

TREASURY BILL	INFLATION
9.95%	8.00%
364 day, 21 Oct auction · PDMO	CCPI year on year, September · CBSL

MARKET P/E	PRICE TO BOOK
10.13x	1.17x
trailing · CSE p1.3	market · CSE p1.3

09 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

CODE	COMPANY	EX-DIV	PAYMENT	TO EX-DIV	LKR/SKARE
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LCBF	Lanka Credit & Bus.	26 Oct	12 Nov	today	0.20
UCAR	Union Chemicals	27 Oct	13 Nov	+1d	48.00
HPL	Hatton Plantations	14 Oct	2 Nov	-12d	1.00
LION	Lion Brewery	20 Oct	6 Nov	-6d	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 26 October 2026.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

INDUSTRY GROUP	TURNOVER	SHARE	PER	PBV	DY
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BY TURNOVER TODAY, LKR MN

Banks	185.67	27.9%	4.62	0.73	4.29
Capital goods	168.48	25.3%	16.50	1.00	2.39
Diversified financials	67.16	10.1%	7.05	0.72	2.99
Materials	57.33	8.6%	10.45	1.52	3.25
Food beverage & tobacco	51.18	7.7%	14.00	1.88	4.94
Utilities	27.94	4.2%	17.43	1.83	0.91
Real estate management	21.93	3.3%	8.55	1.03	2.34
Energy	21.69	3.3%	12.85	0.86	0.00

BEST SECTORS YEAR TO DATE

Telecommunication services	+34%
Commercial & professional	+9%
Real estate management	+2%
Transportation	+1%
Food beverage & tobacco	-8%

Banks took 27.9% of the day's turnover, more than half of it Commercial Bank, and capital goods 25.3%, almost half of that Access Engineering. Banks trade on **4.62x** earnings against a market on 10.13x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET	INDEX	DAY	YTD
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FRONTIER, ASIA-PACIFIC

Bangladesh	DSE Broad	-0.3%	+11.7%
Vietnam	VN Index	-0.6%	-1.2%
Pakistan	Karachi All Share	+0.2%	-5.6%
Sri Lanka	CSE All Share	-0.2%	-13.2%

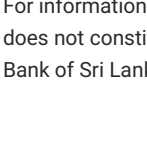
EMERGING, ASIA-PACIFIC

Taiwan	Taiwan Weighted	-1.8%	+59.0%
South Korea	KOSPI	-1.5%	+29.8%
Thailand	SET Index	+1.0%	+25.3%
Malaysia	FTSE Bursa KLCI	-0.6%	-4.7%
Philippines	PSEi Composite	-1.5%	-6.8%
China	Dow Jones Shanghai	-0.4%	-9.4%
India	Nifty 50	+0.4%	-13.1%
India	BSE Sensex 30	+0.4%	-13.9%
China	SZSE Component	-1.2%	-14.7%
Indonesia	JSE Composite	-1.4%	-38.0%

DEVELOPED, ASIA-PACIFIC

Japan	Nikkei 225	-0.2%	+23.6%
Singapore	FTSE Singapore	+0.1%	+16.2%
New Zealand	NZX 50	-0.1%	+1.4%
Australia	S&P/ASX 200	+0.2%	+1.1%
Hong Kong	Hang Seng	+0.5%	-9.4%

Sri Lanka's 0.2% fall came on a weaker day for the region: eleven of the other eighteen markets fell, Taiwan by 1.8%. On the year it is sixteenth of nineteen.



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