

DAILY MARKET WATCH

27th October 2026

Tuesday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,692.67

▲ +52.11 · 0.27%

ASPI YTD -12.96%

SL20 YTD -8.85%

The index ends a run of six falls, **its first gain since 16 October**

S&P SL20

5,612.31
+0.19%

TURNOVER, LKR MN

849.37
+27.5% d/d

MARKET CAP, LKR BN

7,113.28
+0.28%

00 MARKET COMMENTARY

TUESDAY · CLOSE OF TRADE

The All Share Price Index rose **0.27%** to **19,692.67**, its first gain after six straight falls. The S&P SL20 rose 0.19% to 5,612.31. The index is 5.38% down on the month and 12.96% on the year, and the RSI reads 27.11, still below the oversold line at 30.

Risers led for the first time in seven sessions. 125 securities rose against 75 that fell, a ratio of 1.67. The eight contributors carried here are a net +14.45 points, leaving **+37.66** to everything else.

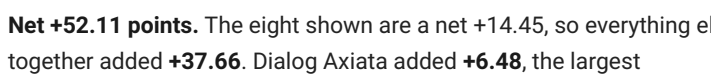
Dialog Axiata's rise of 0.20 to 42.20 added 6.48 points, Carsons 5.14 on a rise of 6.75 to 670.00, and Cold Stores 5.05. Dockyard took 3.98 off on a fall of 3.70 to 95.30, the largest negative contribution of the day.

Turnover rose 27% to LKR 849.37 mn, 75% below the year-to-date daily average. CIC Holdings took 14.6% of it and Panasian Power 6.4%. Three crossings, two in CIC and one in JKH, came to LKR 81.04 mn, 9.5% of the day.

Foreigners returned to net buying after selling on balance on Monday: they bought 5.9 times what they sold, for a net inflow of LKR 35.12 mn. CIC Holdings was the largest net buy at LKR 24.50 mn and Commercial Bank the largest net sale at LKR 1.25 mn.

01 MARKET BENCHMARK

INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Wednesday 21 October. The index is 1.18% below that close; today's gain ended a run of **six falls**.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net +52.11 points. The eight shown are a net +14.45, so everything else together added **+37.66**. Dialog Axiata added **+6.48**, the largest contribution either way.

03 MARKET BREADTH

264 TRADED

125 up securities, up against down **75 down**

125 75

264 traded companies

Risers to fallers **1.67**

125 and 75 count **securities**; 264 counts **companies**, so they do not sum. At **1.67**, risers led for the first time in seven sessions.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT **42.31** SOLD **7.19**

LARGEST NET BUYS

CIC Holdings 24.50 Commercial Bank 1.25

Chevron Lubricants 5.33 Amana Bank 0.76

Prime Lands Residencies 4.57 People's Leasing 0.76

Panasian Power 0.98 Janashakthi Insurance 0.33

Lion Brewery 0.69 Hemas 0.30

NET INFLOW

35.12

Foreigners bought **5.9x** what they sold, for a net inflow of LKR 35.12 mn. CIC Holdings was the largest net buy at **LKR 24.50 mn**.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS % LOSERS %

KPHL +14.3 EXT -7.4

EML +9.7 AFSL -6.6

ATLL +8.8 TESS -6.3

CALF +8.6 LDEV -4.9

EMER +8.1 ODEL -4.7

Kapruka rose **14.3% to 16.80** on LKR 5.87 mn of turnover. The largest fall was Exterminators, **7.4% to 11.20**. 125 securities rose against 75.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 849.37 MN TURNOVER 100%

CIC 123.84 14.6%

PANASIAN POWER 54.38 6.4%

JKH 50.69 6.0%

SOFTLOGIC LIFE 50.20 5.9%

HAYCARB 34.07 4.0%

Rest of market 536.19 63.1%

YESTERDAY 666.31 +27.5% YTD DAILY AVG 3,450

CIC Holdings took 14.6% of the day, 40% of it in two crossings at LKR 24.50. JKH's LKR 50.69 mn was 63% one crossing at 17.80.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC 27.10 COMPARED WITH CHG %

AGAINST THE PREVIOUS SESSION, 26.10

All Share Price Index 19,692.67 19,640.56 0.27

S&P Sri Lanka 20 5,612.31 5,601.87 0.19

Market cap, LKR bn 7,113.28 7,093.15 0.28

Dividend yield, % 3.38 3.39 -0.29

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn 849.37 3,450.00 -75.38

Share volume, mn 34.07 133.96 -74.57

Trades 13,097 26,340 -50.28

TODAY

Foreign purchases, LKR mn 42.31 — —

Foreign sales, LKR mn 7.19 — —

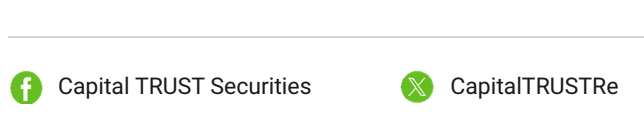
Net foreign flow, LKR mn 35.12 — —

Traded companies 264 — —

08 MOMENTUM AND RATES

OVERSOLD

70 27.11



PRIME LENDING RATE

10.93%

AWPR, week to 23 Oct · CBSL

POLICY RATE

8.75%

OPR, held 30 Sep · CBSL

TREASURY BILL

9.95%

364 day, 21 Oct auction · PDMO

INFLATION

8.00%

CCPI year on year, September · CBSL

MARKET P/E

10.16x

trailing · CSE p1.3

PRICE TO BOOK

1.17x

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/SKARE

UCAR Union Chemicals 27 Oct 13 Nov today 48.00

HPL Hatton Plantations 14 Oct 2 Nov -13d 1.00

LION Lion Brewery 20 Oct 6 Nov -7d 40.30

LCBF Lanka Credit & Bus. 26 Oct 12 Nov -1d 0.20

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 27 October 2026.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

INDUSTRY GROUP TURNOVER SHARE PER PBV DY

BY TURNOVER TODAY, LKR MN

Materials 229.66 27.0% 10.48 1.52 3.24

Capital goods 114.99 13.5% 16.53 1.01 2.39

Banks 92.30 10.9% 4.62 0.73 4.29

Diversified financials 89.58 10.5% 7.04 0.72 3.00

Food beverage & tobacco 76.33 9.0% 14.06 1.89 4.92

Insurance 63.03 7.4% 7.39 0.95 5.11

Utilities 62.38 7.3% 17.50 1.83 0.91

Real estate management 45.18 5.3% 8.60 1.04 2.33

BEST SECTORS YEAR TO DATE

Telecommunication services +35%

Commercial & professional +10%

Real estate management +3%

Transportation +1%

Food beverage & tobacco -7%

Materials took 27.0% of the day's turnover, more than half of it CIC Holdings, and capital goods 13.5%. Banks trade on **4.62x** earnings against a market on 10.16x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET INDEX DAY YTD

FRONTIER, ASIA-PACIFIC

Bangladesh DSE Broad -0.6% +11.0%

Vietnam VN Index -0.1% -1.3%

Pakistan Karachi All Share +0.8% -4.7%

Sri Lanka CSE All Share +0.3% -13.0%

EMERGING, ASIA-PACIFIC

Taiwan Taiwan Weighted 0.0% +59.0%

South Korea KOSPI +3.1% +33.8%

Thailand SET Index -0.2% +25.0%

Malaysia FTSE Bursa KLCI +0.5% -4.1%

Philippines PSEi Composite +2.1% -4.8%

China Dow Jones Shanghai -1.7% -11.0%

India Nifty 50 0.0% -12.9%

India BSE Sensex 30 -0.1% -13.7%

China SZSE Component -2.5% -16.9%

Indonesia JSE Composite -3.0% -39.7%

DEVELOPED, ASIA-PACIFIC

Japan Nikkei 225 0.0% +25.7%

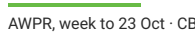
Singapore FTSE Singapore +0.1% +16.2%

Australia S&P/ASX 200 +0.5% +1.6%

New Zealand NZX 50 -0.4% +1.0%

Hong Kong Hang Seng -0.7% -10.1%

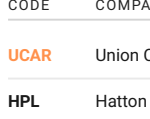
Sri Lanka's 0.3% rise came on a mixed day for the region: six of the other eighteen markets rose, three were flat and nine fell, with South Korea up 3.1%. On the year it is fifteenth of nineteen.



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