

Weekly Market Update

02nd October 2026

Week ended 2 October 2026 · Colombo Stock Exchange

ALL SHARE PRICE INDEX

20,812.64

▼ 1.07% on the week

SL20 -0.96%

TURNOVER, LKR BN	MARKET CAP, LKR BN	MARKET PER, X
5.47	7,535	10.76
+0.11%	-1.18%	-1.19%

01 THE WEEK IN SUMMARY

REVIEW · AHEAD · THOUGHT

The week in review

- ASPI **-1.07%** to 20,812.64, a fourth consecutive weekly loss though not the deepest; the S&P SL20 fell with it, **-0.96%**.
- Turnover **flat at LKR 5.47Bn**, up 0.11%, on a daily run rate of LKR 1,093Mn.
- Foreigners net sellers of **LKR 273.88Mn**, selling 2.2× what they bought against 4.2× a week earlier.
- Crossings of **LKR 1,427.51Mn** were 26.1% of equity trade.
- Policy rate held at **8.75%**; the 91-day bill rose a fourth week, the 364-day a third to **9.95%**.

The week ahead

- The Treasury bill auction is scheduled for Wednesday 7 October.
- Seven Hayleys group companies go ex-dividend on Friday 9 October.

Thought of the week

The fall was broad. Only **two of the twenty** GICS industry groups finished higher from Monday to Friday close. The exchange lists ten securities adding **+37.81 points**, so the rest was a net **-262.52**; that says nothing about company size, since the list ranks positive contributions, not market capitalisation. The index spread does: the S&P SL20 lost 0.96% against 1.07%, so the largest names fell by less than the market.

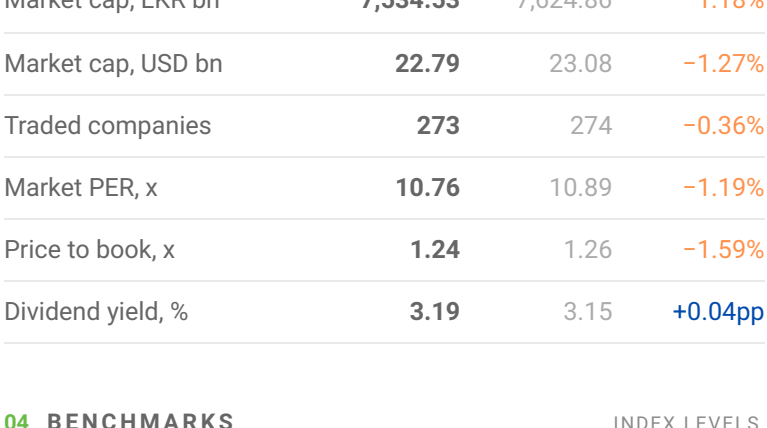
Activity did not move, but its composition did. Turnover rose **0.11%** and the daily run rate held at LKR 1,093Mn, yet **39 crossings worth LKR 1,427.51Mn were 26.1%** of equity turnover. Friday carried the extreme case: four Standard Capital blocks at a flat LKR 40.00, 99% of that counter's week, while it closed 21.4% higher at 44.30.

Foreign behaviour improved even as the index fell. Purchases rose **75%** while sales eased 6%, cutting the sold-to-bought ratio to 2.2 from 4.2 and narrowing the net outflow by **LKR 127.44Mn**, or 32%, on the week. Against a 364-day bill at 9.95% we would not call that a turn, but it is the one constructive line in the week, in our view.

02 THE WEEK

TURNOVER BY SESSION

LKR MN



The CSE weekly compares Friday index levels, so the week is shown here by turnover, which that summary does report for every session. Dashed line: the week's daily average of **LKR 1,093Mn**.

03 MARKET PERFORMANCE

WEEK ON WEEK

METRIC	02.10	25.09	WEEK
All Share Price Index	20,812.64	21,037.35	-1.07%
S&P SL 20 Index	5,883.50	5,940.72	-0.96%
Turnover, LKR mn	5,466.95	5,461.12	+0.11%
Daily average, LKR mn	1,093.39	1,092.22	+0.11%
Share volume, mn	255.91	254.88	+0.41%
Trades	64,662	62,794	+2.97%
Market cap, LKR bn	7,534.53	7,624.86	-1.18%
Market cap, USD bn	22.79	23.08	-1.27%
Traded companies	273	274	-0.36%
Market PER, x	10.76	10.89	-1.19%
Price to book, x	1.24	1.26	-1.59%
Dividend yield, %	3.19	3.15	+0.04pp

INDEX	02.10	25.09	WEEK
All Share Price Index	20,812.64	21,037.35	-1.07%
S&P SL 20 Index	5,883.50	5,940.72	-0.96%

04 BENCHMARKS

INDEX LEVELS

INDEX	02.10	25.09	WEEK
All Share Price Index	20,812.64	21,037.35	-1.07%
S&P SL 20 Index	5,883.50	5,940.72	-0.96%

05 FOREIGN FLOW

LKR MN



Foreigners sold **2.2×** what they bought, against 4.2× a week earlier. Two-way foreign participation rose to **6.5%** of trade from 6.0%.

06 SECTOR PERFORMANCE

MON TO FRI CLOSE

SECTOR	MON TO FRI, %
Utilities	+0.30
Insurance	+0.03
Real estate	-1.46
Transportation	-1.63
Commercial & prof.	-1.89
Food & staples	-2.89

Monday's close against Friday's, not week on week.

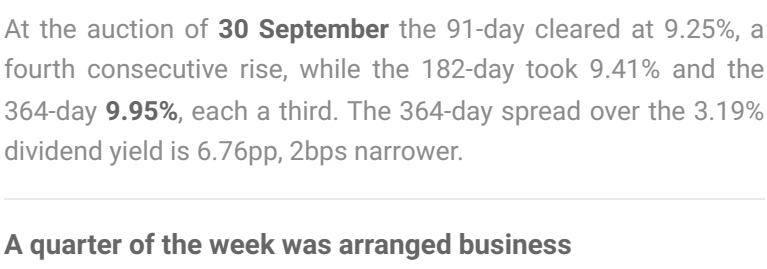
07 RATES

LATEST VS PREVIOUS

RATE	LATEST	PRIOR	WEEK, PP
91 days	9.25	9.20	+0.05
182 days	9.41	9.37	+0.04
364 days	9.95	9.93	+0.02
AWPR wk to 02 Oct	11.04	10.94	+0.10
AWFDR, July	9.20	8.98	+0.22
USD mid, 02 Oct	330.62	330.35	+0.08

08 PRIME LENDING RATE

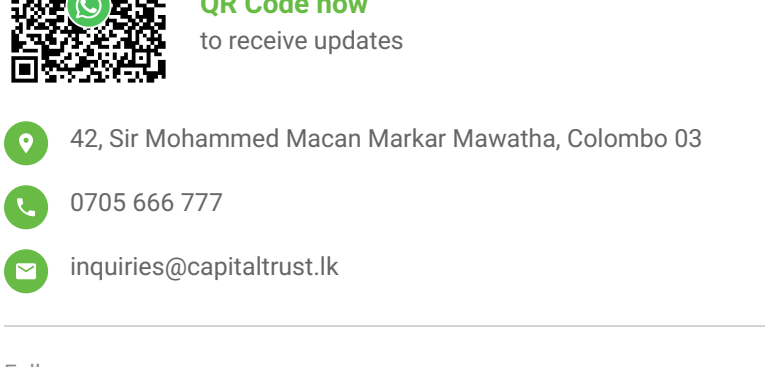
WEEKLY, %



Average weighted prime lending rate, weekly. **11.04%** for the week ending 2 October, up 10bps, which is the **latest week the Central Bank has published**. Only the last readings are published figures; the earlier path is indicative.

09 TURNOVER, FOUR WEEKS

LKR MN



The same week of 2025 turned over LKR 33,296Mn, so this week was **16%** of a year ago.

10 ECONOMIC NEWS

CENTRAL BANK · TREASURY

The Central Bank holds the policy rate at 8.75%

At **Monetary Policy Review No. 5 of 2026**, announced on 30 September, the Central Bank maintained the Overnight Policy Rate at **8.75%**. It pointed to the May tightening still working through the economy, to geopolitical tension and to El Niño risk. The rate has been unchanged since the 100bp increase in May.

Inflation holds at 8.0%, but core accelerates

CCPI headline inflation was unchanged at **8.0%** year on year in September, while **core accelerated to 5.4% from 5.1%** and food to 8.7%. A steady headline with a rising core is the combination that keeps a policy rate on hold rather than falling.

Treasury yields rise again, the short end for a fourth week

At the auction of **30 September** the 91-day cleared at 9.25%, a fourth consecutive rise, while the 182-day took 9.41% and the 364-day **9.95%**, each a third. The 364-day spread over the 3.19% dividend yield is 6.76pp, 2bps narrower.

A quarter of the week was arranged business

Thirty-nine crossings worth **LKR 1,427.51Mn** were **26.1%** of equity turnover. Friday carried nine of them, of which four Standard Capital blocks at a flat LKR 40.00 were 99% of that counter's trade against a screen close of 44.30.

11 CONTACT US

CONTACT INFORMATION

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