

Week ended 9 October 2026 · Colombo Stock Exchange

ALL SHARE PRICE INDEX

20,316.91

▼ 2.38% on the week

SL20 -1.61%

TURNOVER, LKR BN

9.99

+82.7%

MARKET CAP, LKR BN

7,355

-2.39%

MARKET PER, X

10.50

-2.42%

01 THE WEEK IN SUMMARY

REVIEW · AHEAD · THOUGHT

The week in review

- ASPI **-2.38%** to 20,316.91, a fifth consecutive weekly loss and the steepest weekly fall since June; a new year low of 20,234.34 was set on Thursday.
- Turnover **up 82.7% to LKR 9.99Bn**, a daily run rate of LKR 1,997Mn.
- Crossings of **LKR 4,139.94Mn** were 41.5% of equity trade, in 52 blocks.
- Foreigners net sellers of **LKR 339.71Mn**, and only 3.2% of two-way trade against 6.5% a week earlier.
- 19 of the 20** industry groups fell week on week; health care lost 8.57% and nine sector indices set a new 52-week low.

The week ahead

- The Treasury bill auction is scheduled for Wednesday 14 October.
- The Central Bank is expected to publish its next weekly indicators on Friday 16 October.

Thought of the week

The selling was almost universal. **Nineteen of the twenty** GICS industry groups fell on the week, and the one that did not, transportation, rose 0.29%. **Nine set a new 52-week low**, banks and insurance among them. The exchange lists ten securities adding **+11.82 points** against an index down 495.73, so the rest was a net -507.55.

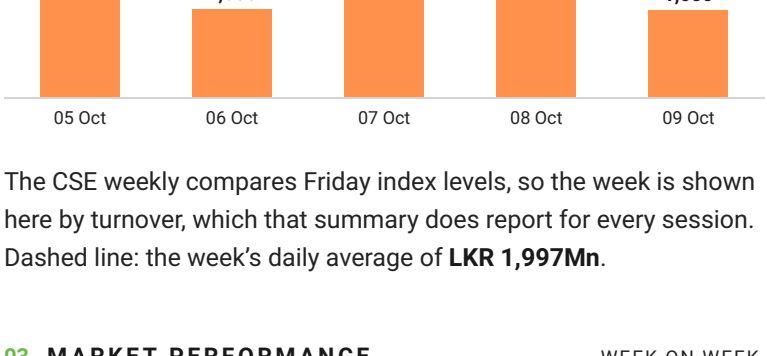
Turnover nearly doubled, which reads better than it is. **41.5% of it was arranged** in 52 crossings worth LKR 4,139.94Mn, against 26.1% a week earlier. The same week of 2025 turned over LKR 37.04Bn, but in four sessions against five, so the fair comparison is daily: LKR 1,997Mn against LKR 9,259Mn, or **22%**.

Foreign participation is the line we would watch. The net outflow widened from LKR 273.88Mn to LKR 339.71Mn, and foreigners were **3.2% of two-way trade against 6.5%** a week earlier. The market traded 83% more; they bought 32% less. Stepping away from a busier market is a different signal from selling into a quiet one, in our view.

02 THE WEEK

TURNOVER BY SESSION

LKR MN



Session	Turnover (LKR MN)
05 Oct	3,161
06 Oct	1,066
07 Oct	1,969
08 Oct	2,741
09 Oct	1,050
Avg	1,997

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 1,997Mn**.

03 MARKET PERFORMANCE

WEEK ON WEEK

METRIC	09.10	02.10	WEEK
All Share Price Index	20,316.91	20,812.64	-2.38%
S&P SL 20 Index	5,788.75	5,883.50	-1.61%
Turnover, LKR mn	9,987.08	5,466.95	+82.68%
Daily average, LKR mn	1,997.42	1,093.39	+82.68%
Share volume, mn	314.12	255.91	+22.75%
Trades	75,026	64,662	+16.03%
Market cap, LKR bn	7,354.72	7,534.53	-2.39%
Market cap, USD bn	22.22	22.78	-2.46%
Traded companies	273	273	0.00%
Market PER, x	10.50	10.76	-2.42%
Price to book, x	1.21	1.24	-2.42%
Dividend yield, %	3.27	3.19	+0.08pp

04 BENCHMARKS

INDEX LEVELS

INDEX	09.10	02.10	WEEK
All Share Price Index	20,316.91	20,812.64	-2.38%
S&P SL 20 Index	5,788.75	5,883.50	-1.61%

05 FOREIGN FLOW

LKR MN

BOUGHT

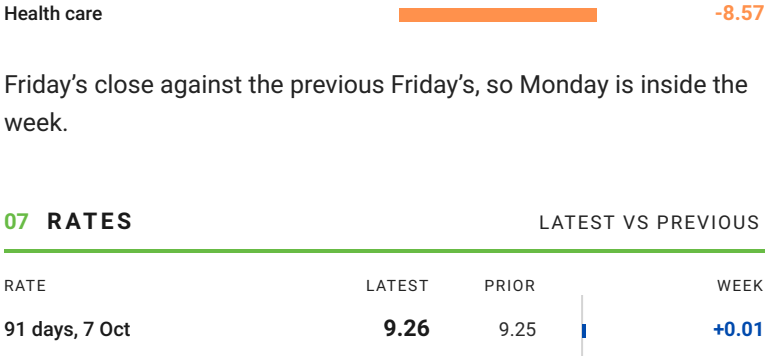
151.06

SOLD

490.77

NET OUTFLOW

-339.71



Foreigners sold **3.2×** what they bought, against 2.2× a week earlier. Two-way foreign participation fell to **3.2%** of trade from 6.5%.

06 SECTOR PERFORMANCE

MON TO FRI CLOSE

SECTOR	WEEK, %
Transportation	+0.29
Commercial & prof.	-3.83
Software & services	-3.84
Diversified fin.	-4.15
Automobiles	-4.82
Health care	-8.57

Friday's close against the previous Friday's, so Monday is inside the week.

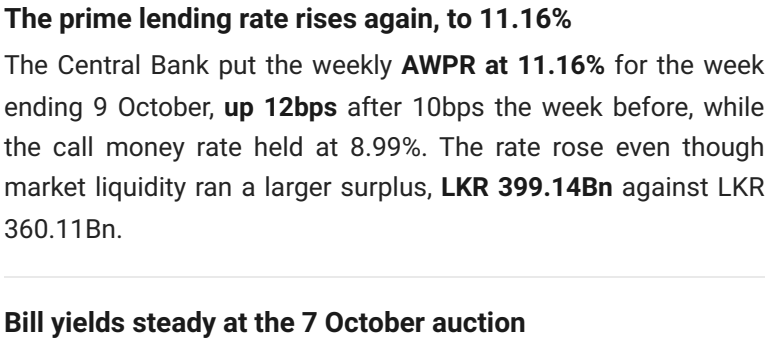
07 RATES

LATEST VS PREVIOUS

RATE	LATEST	PRIOR	WEEK
91 days, 7 Oct	9.26	9.25	+0.01
182 days, 7 Oct	9.44	9.41	+0.03
364 days, 7 Oct	9.95	9.95	0.00
AWPR wk to 09 Oct	11.16	11.04	+0.12
AWCMR, 09 Oct	8.99	8.99	0.00
USD mid	330.94	330.68	+0.26
GBP mid	438.21	436.53	+1.68
EUR mid	371.53	371.84	-0.31
JPY mid	2.10	2.09	+0.01

08 PRIME LENDING RATE

WEEKLY, %



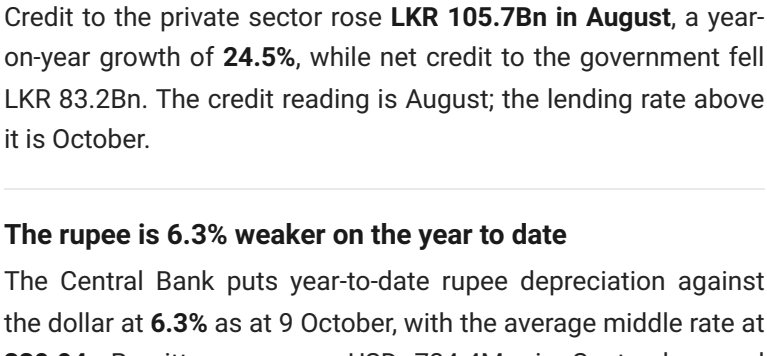
Date	Rate (%)
31 Oct 25	8.31
24 Apr 26	10.00
09 Oct 26	11.16

Average weighted prime lending rate, weekly. **11.16%** for the week ending 9 October, up 12bps. Every point is a published Central Bank reading, from 8.31% on 31 October 2025.

09 TURNOVER, FOUR WEEKS

LKR MN

LKR MN



Session	Turnover (LKR MN)
18 Sep	8,070
25 Sep	5,461
02 Oct	5,467
09 Oct	9,987

The same week of 2025 turned over LKR 37,037Mn in 4 sessions against this week's 5, so per session this week was **22%** of a year ago.

10 ECONOMIC NEWS

CENTRAL BANK · TREASURY

The prime lending rate rises again, to 11.16%

The Central Bank put the weekly **AWPR at 11.16%** for the week ending 9 October, **up 12bps** after 10bps the week before, while the call money rate held at 8.99%. The rate rose even though market liquidity ran a larger surplus, **LKR 399.14Bn** against LKR 360.11Bn.

Bill yields steady at the 7 October auction

The Central Bank reports bids of about **2.1 times** the amount offered at the **7 October** auction, with yields broadly stable in both the primary and secondary markets. The 364-day cleared unchanged at **9.95%**, the 91-day rose 1bp to 9.26% and the 182-day 3bps to 9.44%.

Private credit grows 24.5% on the year

Credit to the private sector rose **LKR 105.7Bn in August**, a year-on-year growth of **24.5%**, while net credit to the government fell LKR 83.2Bn. The credit reading is August; the lending rate above it is October.

The rupee is 6.3% weaker on the year to date

The Central Bank puts year-to-date rupee depreciation against the dollar at **6.3%** as at 9 October, with the average middle rate at **330.94**. Remittances were USD 734.4Mn in September, and gross official reserves were provisionally **USD 6,851Mn** at end September, including the PBOC swap.



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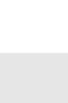
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