

Weekly Market Update

16th October 2026

Week ended 16 October 2026 · Colombo Stock Exchange

ALL SHARE PRICE INDEX

20,185.05

▼ 0.65% on the week

SL20 -0.86%

TURNOVER, LKR BN	MARKET CAP, LKR BN	MARKET PER, X
6.88	7,293	10.42
-31.1%	-0.84%	-0.76%

01 THE WEEK IN SUMMARY

REVIEW · AHEAD · THOUGHT

The week in review

- ASPI **-0.65%** to 20,185.05, a sixth consecutive weekly loss; it closed at a year low of 19,796.06 on Wednesday, then recovered 1.97%.
 - Turnover **down 31.1% to LKR 6.88Bn**, a daily run rate of LKR 1,377Mn.
 - Crossings of **LKR 2,107.54Mn** were 30.6% of equity trade, in 32 blocks.
 - Foreigners net sellers of **LKR 59.94Mn**, against LKR 339.71Mn a week earlier; they sold 1.3 times what they bought.
 - 17 of the 20** industry groups fell week on week; commercial and professional services lost 4.91%, and eleven set a new 52-week low during the week.
- The week ahead
- The next Treasury bill auction is expected on Wednesday 21 October.
 - The Central Bank is expected to publish its next weekly indicators on Friday 23 October.

Thought of the week

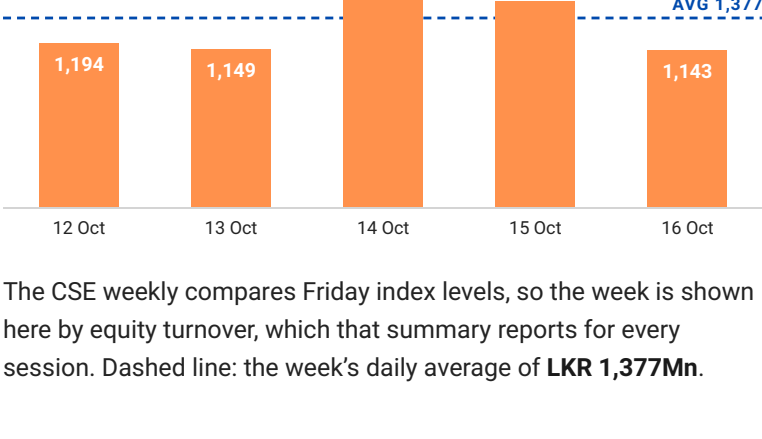
The week had two halves. The index lost **2.56%** in its first three sessions and on Wednesday closed below 20,000 for the first time this year, at 19,796.06. It then recovered **1.97%** on Thursday and Friday. **Eleven** of the twenty industry groups set a new 52-week low during the week, and by Friday all eleven had closed above it.

Three groups rose on the week: automobiles, health care and consumer durables. The exchange lists ten securities adding **+60.16 points**, led by Distilleries at 22.75 and Cold Stores at 13.47, against an index down 131.86, so the rest was a net -192.02. Turnover fell 31%, and per session it was **18%** of the same week of 2025, which also had five sessions.

Foreign selling eased. The net outflow narrowed to **LKR 59.94Mn** from LKR 339.71Mn, and foreigners were net buyers on Monday and Tuesday. But they were **3.0% of two-way trade** against 3.2%, so the flow is calmer rather than larger. Whether the recovery from Wednesday's low holds is the line we would watch, in our view.

02 THE WEEK

TURNOVER BY SESSION



The CSE weekly compares Friday index levels, so the week is shown here by equity turnover, which that summary reports for every session. Dashed line: the week's daily average of **LKR 1,377Mn**.

03 MARKET PERFORMANCE

WEEK ON WEEK

METRIC	16.10	09.10	WEEK
All Share Price Index	20,185.05	20,316.91	-0.65%
S&P SL 20 Index	5,738.83	5,788.75	-0.86%
Turnover, LKR mn	6,884.62	9,987.08	-31.06%
Daily average, LKR mn	1,376.92	1,997.42	-31.06%
Share volume, mn	347.31	314.12	+10.57%
Trades	84,134	75,026	+12.14%
Market cap, LKR bn	7,293.28	7,354.72	-0.84%
Market cap, USD bn	22.01	22.22	-0.93%
Traded companies	273	273	0.00%
Market PER, x	10.42	10.50	-0.76%
Price to book, x	1.20	1.21	-0.83%
Dividend yield, %	3.30	3.27	+0.03pp

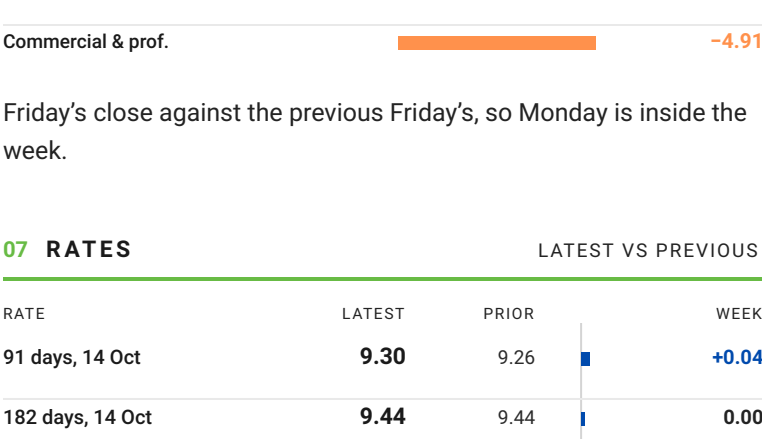
04 BENCHMARKS

INDEX LEVELS

INDEX	16.10	09.10	WEEK
All Share Price Index	20,185.05	20,316.91	-0.65%
S&P SL 20 Index	5,738.83	5,788.75	-0.86%

05 FOREIGN FLOW

LKR MN



Foreigners sold **1.3×** what they bought, against 3.2× a week earlier. Two-way foreign participation fell to **3.0%** of trade from 3.2%.

06 SECTOR PERFORMANCE

WEEK ON WEEK

SECTOR	WEEK, %
Automobiles	+1.27
Health care	+1.12
Consumer durables	+0.96
Retailing	-2.85
Household & pers.	-4.61
Commercial & prof.	-4.91

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

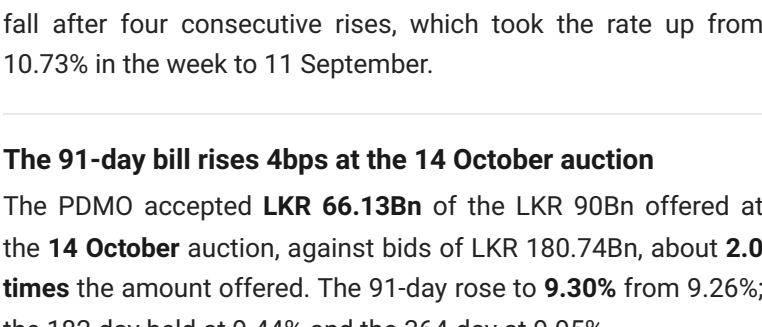
07 RATES

LATEST VS PREVIOUS

RATE	LATEST	PRIOR	WEEK
91 days, 14 Oct	9.30	9.26	+0.04
182 days, 14 Oct	9.44	9.44	0.00
364 days, 14 Oct	9.95	9.95	0.00
AWPR wk to 16 Oct	11.11	11.16	-0.05
USD indicative	331.29	330.96	+0.33
OPR, policy rate	8.75	8.75	0.00

08 PRIME LENDING RATE

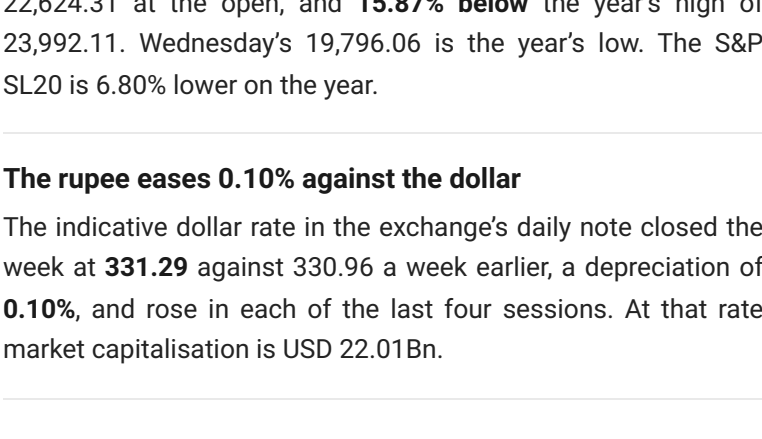
WEEKLY, %



Average weighted prime lending rate, weekly. **11.11%** for the week ending 16 October, down 5bps, the first fall after four weekly rises. Every point is a published Central Bank reading, from 8.31% on 31 October 2025.

09 TURNOVER, FOUR WEEKS

LKR MN



The same week of 2025 turned over LKR 37,221Mn, also in five sessions, so this week was **18%** of a year ago.

10 ECONOMIC NEWS

CENTRAL BANK · TREASURY · CSE

The prime lending rate eases to 11.11%

The Central Bank put the weekly **AWPR at 11.11%** for the week ending 16 October, **down 5bps** from 11.16%. It is the first weekly fall after four consecutive rises, which took the rate up from 10.73% in the week to 11 September.

The 91-day bill rises 4bps at the 14 October auction

The PDMO accepted **LKR 66.13Bn** of the LKR 90Bn offered at the **14 October** auction, against bids of LKR 180.74Bn, about **2.0 times** the amount offered. The 91-day rose to **9.30%** from 9.26%; the 182-day held at 9.44% and the 364-day at 9.95%.

Manufacturing PMI holds at 53.0 in September

The Central Bank's manufacturing PMI was **53.0 in September**, unchanged from August and above the 50 line. New orders and production expanded, led by food and beverages and by textiles and apparel, while employment rose at a slower pace.

The ASPI is 10.78% lower on the year

The exchange puts the All Share **10.78% lower** for the year, from 22,624.31 at the open, and **15.87% below** the year's high of 23,992.11. Wednesday's 19,796.06 is the year's low. The S&P SL20 is 6.80% lower on the year.

The rupee eases 0.10% against the dollar

The indicative dollar rate in the exchange's daily note closed the week at **331.29** against 330.96 a week earlier, a depreciation of **0.10%**, and rose in each of the last four sessions. At that rate market capitalisation is USD 22.01Bn.

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