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Daily Market Watch

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ASPI Ploughs Above 22,500 Amid 8th Largest Turnover For The Year...

Market Commentary

The Colombo Stock Exchange surged to fresh all-time highs today, supported by strong investor sentiments buoyed by the stronger corporate earnings and sizable deal activity. The AllShare Price Index (ASPI) climbed 0.97% to close at 22,633.80, marking the first time in history the ASPI has surpassed the 22,500 level.

Year-to-date, the ASPI has gained an impressive 42.0%, keeping the CSE among the world's top performing markets in 2025. Meanwhile, the more liquid S&P SL20 Index rose 0.58% to 6,263.03, also recording a new all-time high.

The highlight of the day was Hayleys PLC (HAYL.N) buying 40.52% stake comprising of 778,946 shares in Harischandra Mills (HARI.N), of which 40.52% is from Senthilveri Holdings (Pvt) Ltd., at a price of LKR 3,300.00 per share, generating LKR 2.578bn in turnover.

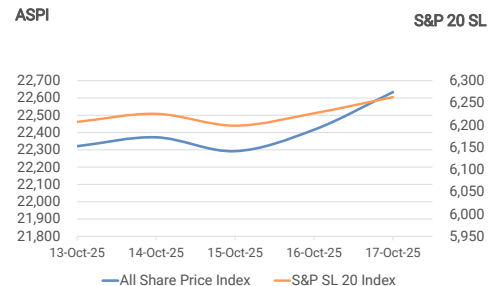
Today's turnover came in at an outsize LKR 11.288bn, the eighth largest for the year so far which was also supported by higher activity in counters such as DFCC Bank PLC (DFCC.N), and Sanasa Development Bank PLC (SDB.N). Sector-wise, Banking, Food & Beverage, and Diversified Financials led the charge.

C T Holdings PLC (CTHR.N), Harischandra Mills PLC (HARI.N), and Cargills (Ceylon) PLC (CARG.N) were the top contributors to today's rally, with market breadth turning positive as 124 stocks advanced against 96 decliners. Investors will wait for more earnings releases as the September quarter earnings season will get into high gear in the coming weeks.

Market Performance

	17.10.2025	16.10.2025	Change (%)
All Share Price Index (ASPI)	22,633.80	22,416.15	0.97
S&P Sri Lanka 20 Index	6,263.03	6,226.64	0.58
Turnover (LKR mn)	11,277.74	8,871.11	27.13
Foreign Purchases (LKR mn)	157.36	315.40	(50.11)
Foreign Sales (LKR mn)	1,551.57	1,717.94	(9.68)
Market Cap (LKR bn)	8,093.78	8,028.89	0.81
Market Cap (USD bn)	26.71	26.50	0.81
Traded Companies	270	266	1.50
Market PER (x)	10.03	8.94	0.80
Price to Book (x)	1.50	1.49	0.67
Dividend Yield (%)	2.36	2.38	(0.84)

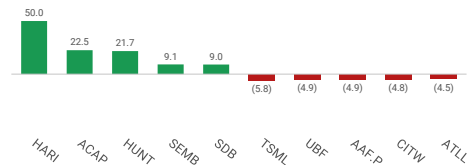
Market Benchmarks



Dividend Announcements

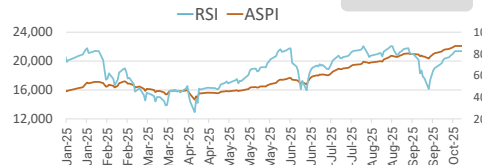
Company Code	Dividend (LKR)	XD Date	Payment Date
CFVF	7.00	21.10.2025	10.11.2025
UCAR	38.00	22.10.2025	07.11.2025
MFPE	0.10	17.11.2025	05.12.2025

Top % Gainers and Losers

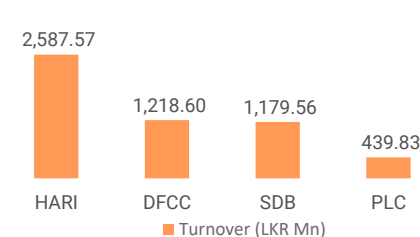


Relative Strength Index (RSI)

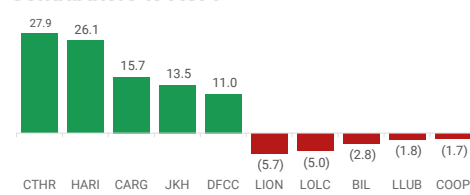
RSI 84.97



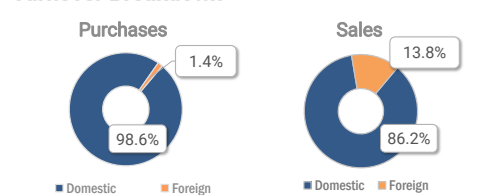
Largest Trades



Contributors to ASPI



Turnover Breakdown



Key Rates

Prime Lending Rate (Weekly Avg. Weighted %)	7.93
Fixed Deposit Rate (Avg. Weighted %)	8.36
Treasury Bill Rate (364 Days %)	8.02
Consumer Price Inflation - CCPI (YoY %)	1.50

Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
DFCC Bnkk LC	DFCC	56.27
Hatton National Bank PLC	HNB	21.78
Sunshine Holdings PLC	SUN	16.73
Sierra Cables PLC	SIRA	15.78
National Development Bank PLC	NDB	14.36
Total		111.74
Net Foreign Sales		
Sanasa Development Bank PLC	SDB	(882.89)
People's Leasing Company PLC	PLC	(304.72)
Tokyo Cement PLC	TKYO	(139.50)
Ceylinc Insurance PLC	CINS	(76.25)
ACL Cables PLC	ACL	(41.97)
Total		(1,505.95)