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Daily Market Watch

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Market Snaps 5 Day Win Streak on Profit Taking...

Market Commentary

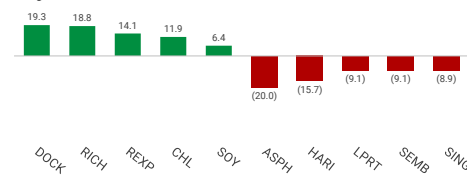
The All-Share Price Index (ASPI) snapped its five day winning streak, closing 0.17% lower at 22,812.52. Despite today's decline, the benchmark index has risen by 43.1% year-to-date, underscoring sustained investor optimism while positioning the Colombo Stock Exchange among the best-performing markets globally.

Meanwhile, the more liquid S&P SL20 Index continued its losing streak for the third consecutive day, falling 0.04% to close at 6,266.31. It appears that the investors are booking profits after a five-day run up in stocks as they remain broadly upbeat about the strong earnings reports by those who reported their September quarter performance.

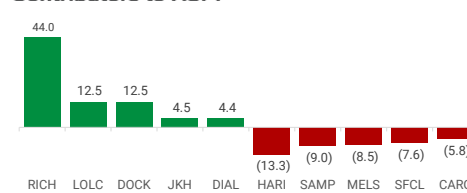
Harischandra Mills PLC (HARI.N), Sampath Bank PLC (SAMP.N), and Melstacorp PLC (MELS.N) were the top contributors to today's decline, while market breadth remained negative with 83 gainers against 145 decliners.

Turnover climbed to LKR 6.21Bn, above the year-to-date daily average of LKR 5.34Bn. Trading was led by LOLC Finance PLC (LOFC.N), Laugfs Gas PLC (LGL.N), and Royal Ceramics Lanka PLC (RCL.N). Activity was largely concentrated in the Capital Goods, Diversified Financials, and Banking Sectors.

Top % Gainers and Losers



Contributors to ASPI



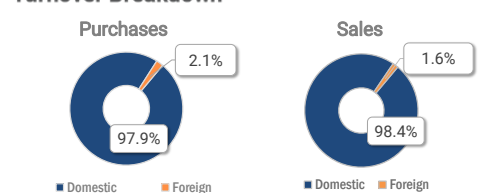
Market Performance

	24.10.2025	23.10.2025	Change (%)
All Share Price Index (ASPI)	22,812.52	22,850.95	(0.17)
S&P Sri Lanka 20 Index	6,266.31	6,268.87	(0.04)
Turnover (LKR mn)	6,213.35	9,240.56	(32.76)
Foreign Purchases (LKR mn)	127.54	163.64	(22.06)
Foreign Sales (LKR mn)	101.68	149.86	(32.15)
Market Cap (LKR bn)	8,155.60	8,154.34	0.02
Market Cap (USD bn)	26.86	26.86	0.02
Traded Companies	271	272	(0.37)
Market PER (x)	10.11	8.94	0.10
Price to Book (x)	1.51	1.51	-
Dividend Yield (%)	2.35	2.35	-

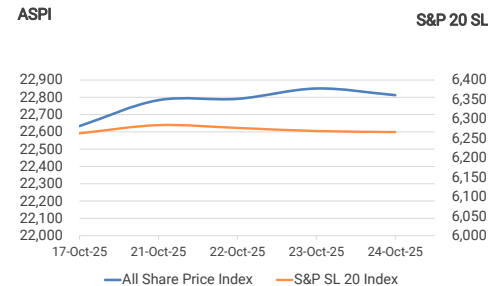
Relative Strength Index (RSI)



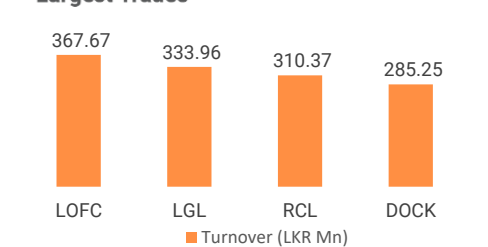
Turnover Breakdown



Market Benchmarks



Largest Trades



Key Rates

Prime Lending Rate (Weekly Avg. Weighted %)	8.17
Fixed Deposit Rate (Avg. Weighted %)	8.36
Treasury Bill Rate (364 Days %)	8.02
Consumer Price Inflation - CCPI (YoY %)	2.10

Dividend Announcements

Company Code	Dividend (LKR)	XD Date	Payment Date
LITE	0.75	03.11.2025	21.11.2025
BFL	5.00	03.11.2025	21.11.2025
MFPE	0.10	17.11.2025	05.12.2025

Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
Hayleys PLC	HAYL	56.27
Ceylon Tobacco Company PLC	CTC	22.82
DFCC Bnkk LC	DFCC	14.52
Sunshine Holdings PLC	SUN	10.88
Dipped Products PLC	DIPD	7.01
Total		118.12
Net Foreign Sales		
Pan Asia Banking Corporation PLC	PABC	(20.25)
Kelani Cables PLC	KCAB	(9.22)
Chevron Lubricants Lanka PLC	LLUB	(9.04)
Richard Pieris and Company PLC	RICH	(8.60)
Seylan Bank PLC	SEYB	(8.09)
Total		(92.26)