CAPITAL TRUST SECURITIES

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# Daily Market Watch


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# Colombo Stock Exchange Ends with Fresh All-Time Highs; ASPI Sets Its 65th Closing High...

## Market Commentary

The Colombo Stock Exchange saw both indices reaching new all-time highs as strong earnings reports continued to lift the investor sentiment on the stocks. The All-Share Price Index (ASPI) advanced 0.56% to close at 22,416.15, settling at its 65th closing high for the year.

The ASPI now remains up a robust 40.6% year-to-date, keeping the Colombo Stock Exchange among the world's top-performing markets in 2025.Meanwhile the more liquid S&P SL20 Index rose 0.45 % to 6,226.64.

Hemas Holdings PLC (HHL.N), Sampath Bank PLC (SAMP.N), and Vidullanka PLC (VLL.N) were the top contributors to today's advance, while market breadth turned positive with 124 gainers against 96 decliners.

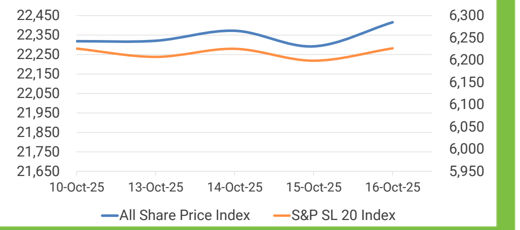
Turnover came in at LKR 8.87Bn, well above the YTD daily average of LKR 5.26Bn. Activity was led by Hemas Holdings PLC (HHL.N), DFCC Bank PLC (DFCC.N), and Central Finance Company PLC (CFIN.N), with trading concentrated in the Banking, Capital Goods, and Diversified Financials sectors.

While the investors appear to be cheering the first batch of earnings reports of a handful of companies which reported results so far this week, they appeared to have further reassured by the continuing strength of the economy as reflected from the Purchasing Managers' Index data for both Manufacturing and Services activities which showed persistence expansion. The two sectors remain further upbeat over the future of their business buoyed by the upcoming festive season which is expected to be stronger and also the rising tourist arrivals.

## Market Performance

| | 16.10.2025 | 15.10.2025 | Change (%) |
|---|---|---|---|
| All Share Price Index (ASPI) | 22,416.15 | 22,292.28 | 0.56 |
| S&P Sri Lanka 20 Index | 6,226.64 | 6,198.82 | 0.45 |
| Turnover (LKR mn) | 8,871.11 | 5,643.14 | 57.20 |
| Foreign Purchases (LKR mn) | 315.40 | 195.10 | 61.66 |
| Foreign Sales (LKR mn) | 1,717.94 | 526.40 | 226.36 |
| Market Cap (LKR bn) | 8,028.89 | 7,991.96 | 0.46 |
| Market Cap (USD bn) | 26.50 | 26.38 | 0.46 |
| Traded Companies | 266 | 268 | (0.75) |
| Market PER (x) | 9.95 | 8.94 | 0.51 |
| Price to Book (x) | 1.49 | 1.48 | 0.68 |
| Dividend Yield (%) | 2.38 | 2.39 | (0.42) |

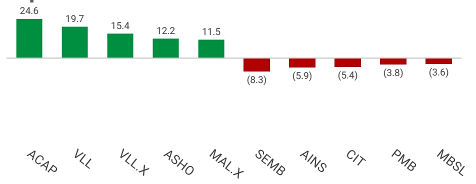
## Market Benchmarks




## Dividend Announcements

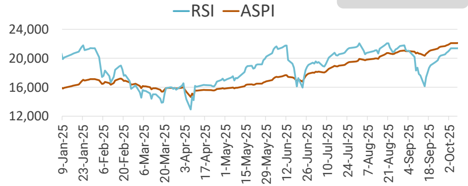
| Company Code | Dividend (LKR) | XD Date | Payment Date |
|---|---|---|---|
| CFVF | 7.00 | 21.10.2025 | 10.11.2025 |
| UCAR | 38.00 | 22.10.2025 | 07.11.2025 |

## Top % Gainers and Losers

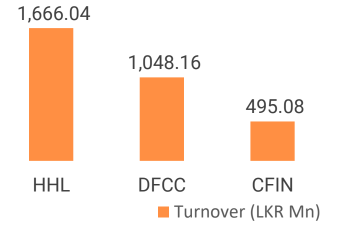



## Relative Strength Index (RSI)

RSI 82.21



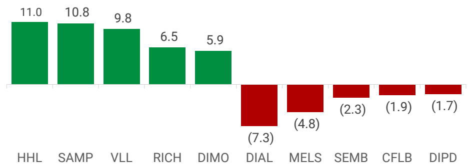

## Largest Trades



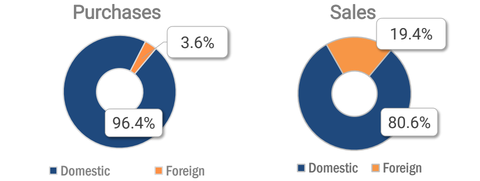

## Daily Change in Foreign Holdings

| Company Name | Code | (LKR mn) |
|---|---|---|
| Net Foreign Purchases | | |
| DFCC Bnnk LC | DFCC | 56.27 |
| Sunshine Holdings PLC | SUN | 25.60 |
| Hatton National Bank PLC(X) | HNB.X | 21.70 |
| Dialog Axiata PLC | DIAL | 21.40 |
| Seylan Bank PLC (X) | SEYB.X | 7.41 |
| Total | | 262.36 |
| Net Foreign Sales | | |
| Hemas Holdings PLC | HHL | (1,343.98) |
| Teejay Lanka PLC | TJL | (156.97) |
| Seylan Bank PLC | SEYB | (60.06) |
| Melstacorp PLC | MELS | (24.62) |
| Chevron Lubricants Lanka PLC | LLUB | (22.02) |
| Total | | (1,664.90) |

## Contributors to ASPI




## Turnover Breakdown




## Key Rates

| | |
|---|---|
| Prime Lending Rate (Weekly Avg. Weighted %) | 8.19 |
| Fixed Deposit Rate (Avg. Weighted %) | 8.36 |
| Treasury Bill Rate (364 Days %) | 8.02 |
| Consumer Price Inflation - CCPI (YoY %) | 1.50 |