

23rd October 2025

Daily Market Watch

42, Sir Mohammed Macan Markar
Mawatha, Colombo 03

0705 666 777

inquiries@capitaltrust.lk



Scan the
QR Code now
to receive updates

Save & send us a whatsapp message
to receive updates

0777 233 633

Capital TRUST Securities

Capital TRUSTRe

Capital TRUST Securities

Capital TRUST Securities

Capital TRUST Securities

Capital TRUST Securities

ASPI Extends Record Breaking Streak With Turnover Topping LKR 9.0Bn ...

Market Commentary

The All-Share Price Index (ASPI) continued its upward momentum for the 5th straight session, climbing 0.26% to close at a fresh all-time high of 22,850.95. With today's gains, the benchmark index has risen by 6,906.34 points or 43.3% year-to-date, underscoring sustained investor optimism and positioning the Colombo Stock Exchange among the best-performing markets globally.

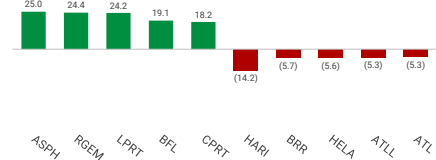
In contrast, the more liquid S&P SL20 Index declined for the second consecutive day, slipping 0.13% to close at 6,268.87 in a sign that the investors booked profits in blue-chip counters which had a stellar run so far this year on economic optimism.

Market breadth turned slightly negative, with 124 decliners outweighing 110 gainers. The key positive contributors to the ASPI were Hayleys PLC (HAYL.N), Ceylon Grain Elevators PLC (GRAN.N), and Richard Pieris & Company PLC (RICH.N), which helped offset broader market weakness.

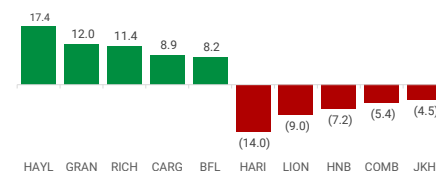
As the earnings season rolled in, the poultry major, Baishya Farms PLC (BFL.N) reported solid financial performance with profits rising by 491.0% to LKR 4,275.97Mn for its fiscal second quarter as the higher prices of live birds and day-old chicks helped the top-line in a reversal from what the industry saw in the previous quarters. The stock ended the day 19.1% higher at LKR 458.25. Ceylon Grain Elevators PLC (GRAN.N), a firm in the same industry ended 9.6% higher.

Turnover surged to LKR 9.24Bn, significantly higher than the year-to-date daily average of LKR 5.33Bn. Trading was led by Laughs Gas PLC (LGL.N), DFCC Bank PLC (DFCC.N), and Royal Ceramics Lanka PLC (RCL.N). Activity was largely concentrated in the Banking, Capital Goods, and Energy Sectors.

Top % Gainers and Losers



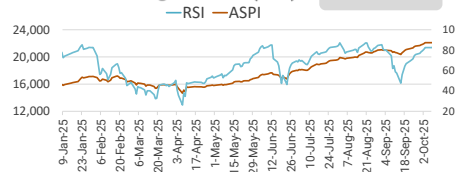
Contributors to ASPI



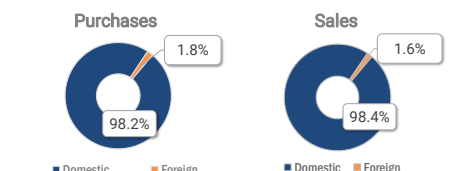
Market Performance

	23.10.2025	22.10.2025	Change (%)
All Share Price Index (ASPI)	22,850.95	22,791.07	0.26
S&P Sri Lanka 20 Index	6,268.87	6,276.86	(0.13)
Turnover (LKR mn)	9,240.56	6,616.54	39.66
Foreign Purchases (LKR mn)	163.64	219.63	(25.49)
Foreign Sales (LKR mn)	149.86	454.68	(67.04)
Market Cap (LKR bn)	8,154.34	8,117.89	0.45
Market Cap (USD bn)	26.89	26.77	0.45
Traded Companies	272	271	0.37
Market PER (x)	10.10	8.94	0.40
Price to Book (x)	1.51	1.50	0.67
Dividend Yield (%)	2.35	2.36	(0.42)

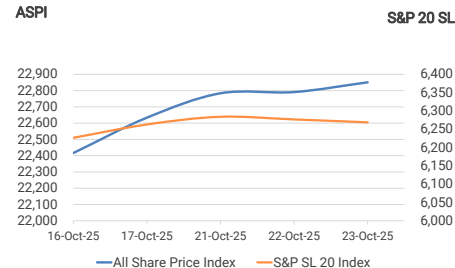
Relative Strength Index (RSI)



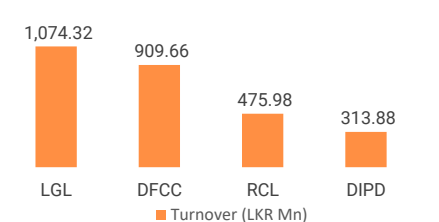
Turnover Breakdown



Market Benchmarks



Largest Trades



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 %)	2.10

Dividend Announcements

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

Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
Hayleys PLC	HAYL	56.27
Hayleys Fabric PLC	MGT	29.12
Dipped Products PLC	DIPD	19.57
DFCC Bnkc LC	DFCC	15.72
Talawakelle Tea Estates PLC	TPL	14.41
Total		154.79
Net Foreign Sales		
Cargills (Ceylon) PLC	CARG	(40.68)
Melstacorp PLC	MELS	(28.84)
Ambeon Capital PLC	TAP	(13.37)
Chevron Lubricants Lanka PLC	LLUB	(9.09)
RIL Property PLC	RIL	(7.62)
Total		(141.00)