CAPITAL TRUST SECURITIES

# 21st October 2025

# Daily Market Watch


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## Market Clinches New Highs As Record Breaking Rally Ploughs Ahead...

### Market Commentary

The Colombo Stock Exchange continued its strong upward momentum, closing with fresh all-time highs for both indices. The broader index advanced 0.66% to kick off the holiday-shortened week, to close at 22,783.62. With today's gains, the ASPI is up by a robust 42.9% year-to-date and has solidified its position as one of the best performing stock exchanges in both the region as well as in the world. Meanwhile the more liquid S&P SL20 index added 0.34% to end at 6,284.07, another all-time high.

Central Finance Company PLC (CFIN.N), Co-operative Insurance Company PLC (COOP.N), and Harischandra Mills PLC (HARI.N) were the top contributors to today's advance, while market breadth remained positive with 126 gainers against 99 decliners.

Turnover came in at LKR 7.42Bn, well above the YTD daily average of LKR 5.31Bn. Activity was led by Seylan Bank PLC (SEYB.N) which generated a turnover of LKR 1.76Bn, of which LKR 1.58Bn came from crossings. This was followed by Sierra Cables PLC (SIRA.N), and Co-operative Insurance Company PLC (COOP.N). Trading was concentrated in the Banking, Diversified Financials, and Capital Goods sectors.

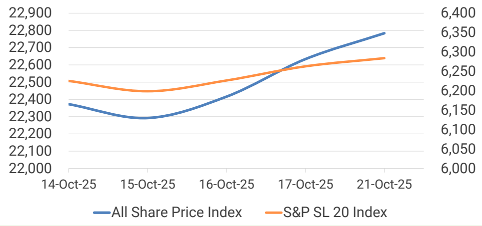
After an initial set of earnings reports by a few companies last week which showed some improved performance across the board, investors could be waiting for a pick-up in earnings reports this week as many companies could be waiting to open their books for the September quarter, which are expected to be even better than what they previously reported.

Meanwhile the consumer prices measured by the National Consumer Prices for September showed the prices rising by 2.1% from a year ago, picking up from the 1.5% in August, mainly due to higher food prices.

### Market Performance

| | 21.10.2025 | 17.10.2025 | Change (%) |
|---|---|---|---|
| All Share Price Index (ASPI) | 22,783.62 | 22,633.80 | 0.66 |
| S&P Sri Lanka 20 Index | 6,284.07 | 6,263.03 | 0.34 |
| Turnover (LKR mn) | 7,422.61 | 11,277.74 | (34.18) |
| Foreign Purchases (LKR mn) | 227.73 | 157.36 | 44.72 |
| Foreign Sales (LKR mn) | 314.19 | 1,551.57 | (79.75) |
| Market Cap (LKR bn) | 8,125.23 | 8,093.78 | 0.39 |
| Market Cap (USD bn) | 26.81 | 26.71 | 0.39 |
| Traded Companies | 270 | 270 | - |
| Market PER (x) | 10.07 | 8.94 | 0.40 |
| Price to Book (x) | 1.50 | 1.50 | - |
| Dividend Yield (%) | 2.35 | 2.36 | (0.42) |

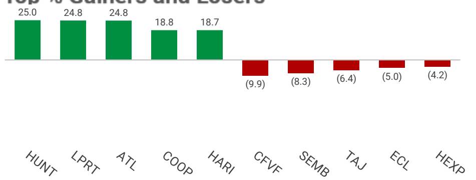
### Market Benchmarks




### Dividend Announcements

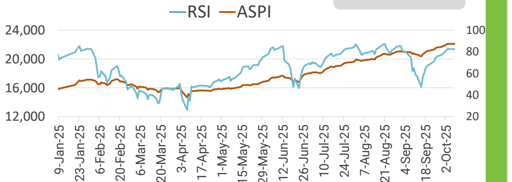
| Company Code | Dividend (LKR) | XD Date | Payment Date |
|---|---|---|---|
| UCAR | 38.00 | 22.10.2025 | 07.11.2025 |
| MFPE | 0.10 | 17.11.2025 | 05.12.2025 |

### Top % Gainers and Losers

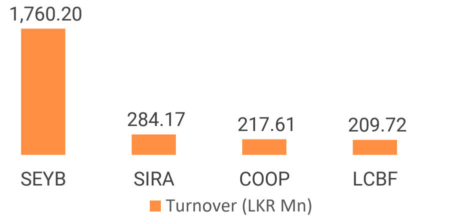



### Relative Strength Index (RSI)

RSI 86.51



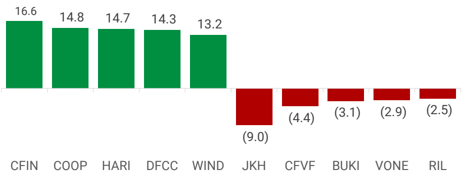

### Largest Trades



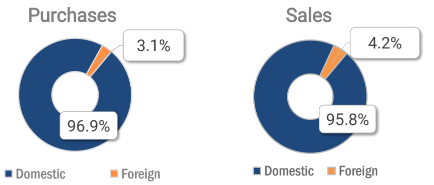

### Daily Change in Foreign Holdings

| Company Name | Code | (LKR mn) |
|---|---|---|
| **Net Foreign Purchases** | | |
| HNB Assurance PLC | HASU | 56.27 |
| Hunas Falls Hotels PLC | HUNA | 29.45 |
| Central Finance Company PLC | CFIN | 26.29 |
| First Capital Holdings PLC | CFVF | 15.70 |
| Sierra Cables PLC | SIRA | 14.60 |
| Total | | 195.56 |
| **Net Foreign Sales** | | |
| Union Assurance PLC | UAL | (58.05) |
| People's Leasing Company PLC | PLC | (41.50) |
| Pan Asia Banking Corporation PLC | PABC | (34.68) |
| ACL Cables PLC | ACL | (25.67) |
| Seylan Bank PLC | SEYB | (21.81) |
| Total | | (282.02) |

### 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 %) | 2.10 |