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Daily Market Watch

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Market Ends In A Mixed Note While Valuations Spark Big Deal Activity...

Market Commentary

The market ended on a mixed note today with the All Share Price Index (ASPI) advancing to a new record high while the S&P SL20 index settling slightly lower. The broader index rose marginally by 0.03% to close at 22,791.07. With today's gains, the ASPI is up by a robust 42.9% year-to-date keeping the Colombo Stock Exchange's status as one of the best performing markets in the world. Meanwhile the more liquid S&P SL20 index slid 0.11% to end at 6,276.86.

Momentum indicators for the broader index in fact have been flashing signs of caution as they suggested overbought conditions, although there were other indicators which showed potential for continued bullishness.

Colombo Dockyard PLC (DOCK.N), Sampath Bank PLC (SAMP.N), and Central Finance Company PLC (CFIN.N) were the top contributors to today's advance, while market breadth turned negative with 98 gainers against 132 decliners.

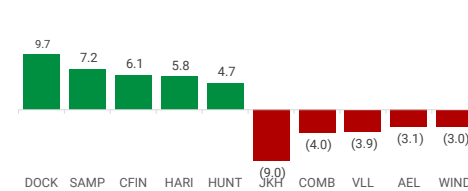
Turnover came in at LKR 6.62Bn, well above the YTD daily average of LKR 5.31Bn. Activity was led by ACL Cables PLC (ACL.N), Colombo Dockyard PLC (DOCK.N), and Lee Hedges PLC (SHAW.N). Trading was concentrated in the Capital Goods, Banking, and Diversified Financials sectors.

Despite the strong run-up in the Colombo stocks in the last 3 years, investors still see pockets of attractive valuations in the market where they look for large transactions while there is strong optimism for Mergers & Acquisitions. Yesterday, the billionaire investor Dhammika Perera parted his 5.0% stake in Seylan Bank PLC (SEYB.N) to the high-net-worth investor, Raynor de Silva in a deal valued at LKR 1.5Bn.

Treasury Bill Summary

Maturity	Weighted Average Yield Rate (%)		Change from last week (%)	Amount Accepted (LKR Mn)
	22-Oct-25	15-Oct-25		
3 months	7.52	7.52	0.00	4,476
6 months	7.89	7.89	0.00	30,765
12 months	8.02	8.02	0.00	4,380

Contributors to ASPI



Market Performance

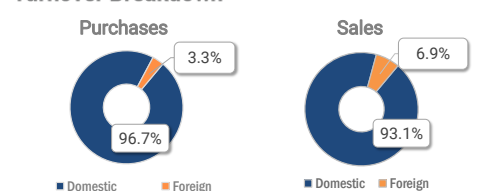
	22.10.2025	21.10.2025	Change (%)
All Share Price Index (ASPI)	22,791.07	22,783.62	0.03
S&P Sri Lanka 20 Index	6,276.86	6,284.07	(0.11)
Turnover (LKR mn)	6,616.54	7,422.61	(10.86)
Foreign Purchases (LKR mn)	219.63	227.73	(3.56)
Foreign Sales (LKR mn)	454.68	314.19	44.72
Market Cap (LKR bn)	8,117.89	8,125.23	(0.09)
Market Cap (USD bn)	26.78	26.81	(0.09)
Traded Companies	271	270	0.37
Market PER (x)	10.06	8.94	(0.10)
Price to Book (x)	1.50	1.50	-
Dividend Yield (%)	2.36	2.35	0.43

Relative Strength Index (RSI)

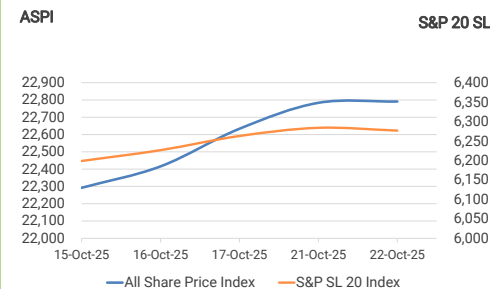
RSI 86.59



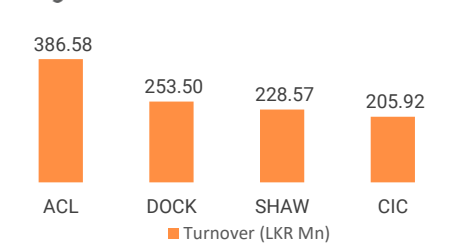
Turnover Breakdown



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

Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
National Development Bank PLC	NDB	56.27
Sunshine Holdings PLC	SUN	38.58
Hemas Holdings PLC	HHL	28.01
Commercial Bank of Ceylon PLC	COMB	20.67
Hayleys Fabric PLC	MGT	11.59
Total		197.65
Net Foreign Sales		
ACL Cables PLC	ACL	(260.92)
Cargills (Ceylon) PLC	CARG	(53.95)
Seylan Bank PLC	SEYB	(26.91)
Melstacorp PLC	MELS	(19.12)
Ceylon Investment PLC	CINV	(12.02)
Total		(432.71)