

Daily Market Update

22-Oct-24

	ASPI	S&P SL20	LKR Mn	Value
Closing	12,300.02	3,628.80	Total Turnover	1937
			Foreign Purchases	72
			Foreign Sales	34
			Net Foreign Change	38
Change	↓ -9.31 -0.08%	↑ 4.05 0.11%	Market RSI	77.3
			Market PE (X)	8
			Market PBV (X)	0.96
			Market Cap. (LKR Bn.)	4,537

Heavily Traded Stocks

Company Name	Code	Volume	Price (LKR)	PE 4QT (x)	PBV(x)	RSI
HIKKADUWA BEACH RESORT PLC	CITH.N0000	63,906,922	3.5	-4.79	0.39	29.7
HELA APPAREL HOLDINGS PLC	HELA.N0000	12,124,730	7.2	-5.03	1.51	78.4
PANASIAN POWER PLC	PAP.N0000	7,086,531	4.9	11.71	1.29	70.9
BROWNS INVESTMENTS PLC	BIL.N0000	5,830,635	5.7	4.41	0.65	55.3
CABLE SOLUTIONS LIMITED	CSLK.N0000	3,812,137	9.3	37.11	2.68	-
LVL ENERGY FUND PLC	LVEF.N0000	3,692,569	5.8	6.26	0.65	74.6
JOHN KEELLS HOLDINGS PLC	JKH.N0000	3,411,981	199	36.90	0.92	77.0
LOLC FINANCE PLC	LOFC.N0000	2,781,618	6	4.99	1.57	53.9
WASKADUWA BEACH RESORT PLC	CITW.N0000	2,336,200	2	-4.91	0.74	37.8
CITRUS LEISURE PLC	REEF.N0000	2,256,531	4.4	-6.60	0.76	37.6
DIALOG AXIATA PLC	DIAL.N0000	1,861,563	11.2	10.82	1.54	84.9
SAMPATH BANK PLC	SAMP.N0000	1,475,597	82.9	4.39	0.60	67.5

Largest Turnovers

Company Name	Code	Value (LKR)
JOHN KEELLS HOLDINGS PLC	JKH.N0000	676,005,584
HIKKADUWA BEACH RESORT PLC	CITH.N0000	224,277,625
SAMPATH BANK PLC	SAMP.N0000	121,857,006
HELA APPAREL HOLDINGS PLC	HELA.N0000	87,281,622
MELSTACORP PLC	MELS.N0000	40,129,704

Top 5 - Gainers

Company Name	Code	% Change
MULLER AND PHIPPS (CEYLON) PLC	MULL.N0000	10%
LANKA ASHOK LEYLAND PLC	ASHO.N0000	9%
PANASIAN POWER PLC	PAP.N0000	9%
ORIENT FINANCE PLC	BFN.N0000	9%
MYLAND DEVELOPMENTS PLC	MDL.N0000	6%

Foreign Purchases

Company Name	Code	Value (LKR)
JOHN KEELLS HOLDINGS PLC	JKH.N0000	29,197,383
COMMERCIAL BANK OF CEYLON PLC	COMB.N0000	17,820,216
SAMPATH BANK PLC	SAMP.N0000	9,847,564
CONVENIENCE FOODS (LANKA)PLC	SOY.N0000	7,300,000
RICHARD PIERIS AND COMPANY PLC	RICH.N0000	3,018,787
WINDFORCE PLC	WIND.N0000	948,362
LANKA IOC PLC	LIOC.N0000	565,000
MELSTACORP PLC	MELS.N0000	412,920
ACCESS ENGINEERING PLC	AEL.N0000	231,220
UNION ASSURANCE PLC	UAL.N0000	114,000
SOFTLOGIC LIFE INSURANCE PLC	AAIC.N0000	105,860
NATIONS TRUST BANK PLC	NTB.N0000	66,276

Foreign Sales

Company Name	Code	Value (LKR)
JOHN KEELLS HOTELS PLC	KHL.N0000	(18,187,038)
RESUS ENERGY PLC	HPWR.N0000	(5,093,335)
ACL CABLES PLC	ACL.N0000	(1,836,220)
CEYLON COLD STORES PLC	CCS.N0000	(1,664,593)
COMMERCIAL BANK OF CEYLON P	COMB.X0000	(1,372,809)
LVL ENERGY FUND PLC	LVEF.N0000	(761,285)
HEMAS HOLDINGS PLC	HHL.N0000	(548,685)
HATTON PLANTATIONS PLC	HPL.N0000	(499,672)
NATIONAL DEVELOPMENT BANK F	NDB.N0000	(461,923)
VIDULLANKA PLC	VLL.N0000	(392,000)
KELANI CABLES PLC	KCAB.N0000	(363,440)
AGSTAR PLC	AGST.N0000	(173,907)

Top 5 - Losers

Company Name	Code	% Change
BLUE DIAMONDS JEWELLERY WORLDWIDE PLC (X)	BLUE.X0000	-33%
BLUE DIAMONDS JEWELLERY WORLDWIDE PLC (X)	BLUE.X0000	-33%
HIKKADUWA BEACH RESORT PLC	CITH.N0000	-15%
TESS AGRO PLC (X)	TESS.X0000	-14%
DIALOG FINANCE PLC	CALF.N0000	-10%

Top 5 - Crossings

Company Name	Code	Value (LKR)
JOHN KEELLS HOLDINGS PLC	JKH.N0000	195,346,602

Announcements

Repurchase of Shares

Company	Repurchase Price (Rs.)	Proportion	Date of opening the offer to repurchase	Date of closing of offer to repurchase
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Rights Issues

Company	Issue Price	Proportion	XR From	Dispatch of Prov. Letter of allotment	Trading Commencing	Renunciation	Last date of acceptance
Anilana Hotels and Properties PLC	0.20	07 for 05			To be notified		
ACME Printing & Packaging PLC	2.50	02 for 01			To be notified		

Dividends

Company	Final/Interim	Dividend (LKR)	XD From	Payment
Lake House Printers and Publishers PLC	First & Final	6.00	1-Oct-24	21-Oct-24
Bukit Darah PLC	Second Interim	6.88	3-Oct-24	23-Oct-24
Talawakele Tea Estates PLC	First Interim	2.25 (Voting)	9-Oct-24	21-Oct-24
Haycarb PLC	Second Interim	1.10 (Voting)	9-Oct-24	21-Oct-24
Hayleys Fabric PLC	Second Interim	0.85 (Voting)	9-Oct-24	22-Oct-24
Singer (Sri Lanka) PLC	Second Interim	0.18 (Voting)	9-Oct-24	22-Oct-24
Horana Plantations PLC	First Interim	1.70 (Voting)	9-Oct-24	22-Oct-24
Dipped Products PLC	Second Interim	0.45 (Voting) 0.45 (Non-Voting)	9-Oct-24	23-Oct-24
Amana Bank PLC	First Interim	1.20 (Voting)	9-Oct-24	29-Oct-24
Ex-Pack Corrugated Cartons PLC	First Interim	0.36 (Voting)	11-Oct-24	1-Nov-24
Agarapathana Plantations PLC	First Interim	1.00 (Voting)	21-Oct-24	28-Oct-14
Cargills Ceylon PLC	First Interim	4.80 (Voting)	25-Oct-24	14-Nov-24
C T Holdings PLC	First Interim	4.00 (Voting)	28-Oct-24	18-Nov-24
Union Chemicals Lanka PLC	First Interim	27.00 (Voting)	1-Nov-24	14-Nov-24

*Announcements for the day

International Stock Markets Update

Market

	Name	Date	Closing Index	Days	Year to date	All time high
Colombo	ASPI	22-Oct-24	12,309.33	0.08%	15.21%	-8.57%
MSCI Frontier Mkt	FM	21-Oct-24	27.56	0.18%	4.79%	-30.35%
MSCI Emerging Mkt	EEM	21-Oct-24	45.60	-0.70%	13.40%	-21.33%
New York	Dow Jones Ind:	21-Oct-24	42,931.60	-0.80%	13.91%	-0.80%
London	FTSE 100	21-Oct-24	8,318.24	-0.48%	7.56%	-1.55%
Bombay	Sensex	22-Oct-24	80,220.72	-1.15%	11.58%	-6.64%
Hong Kong	Hang Seng	22-Oct-24	20,498.95	0.10%	22.10%	-35.86%
Jakarta	JKSE Composite	22-Oct-24	7,788.98	0.21%	6.35%	-1.47%
Tokyo	Nikkei 225	22-Oct-24	38,411.96	-1.39%	14.79%	-9.38%
Shanghai	SSE Composite	22-Oct-24	3,285.87	0.54%	10.92%	-46.34%
Singapore	ST Times	22-Oct-24	3,587.41	-0.75%	11.07%	-2.63%

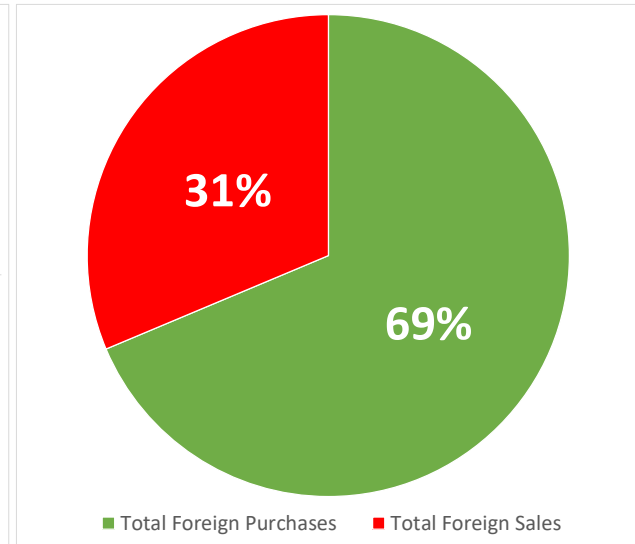
News Highlights

- (Reuters) - London stocks fell on Tuesday, dragged by weakness in the utility and real estate sector, while investors await speeches from Bank of England officials later in the day.officials this week.
- (Reuters) - European stocks slipped on Tuesday, as investors navigated geopolitical and global interest-rate cut uncertainties, while German SAP's strong outlook boosted tech stocks and helped the country's main stock index buck the sluggish trend.
- (Reuters) - Shares in SAP (SAPG.DE), opens new tab were up 5% at market open on Tuesday, hitting an all-time high of 221 euros (\$239.21) after the German software company raised its full-year targets on a strong cloud business in the third quarter.
- (Reuters) - Shares in Traton (8TRA.DE), opens new tab rose on Tuesday after Volkswagen's (VOWG_p.DE), opens new tab truck unit reported third-quarter results above expectations driven by robust sales in its US brand International and Swedish unit Scania.

Commodity Price Update

Currency	Exchange Rate (LKR)		Change (%) Year To Date	COMMODITY	21-Oct-24	22-Oct-24	Change (%) (+/-)
	21-Oct-24	22-Oct-24					
US Dollar (USD)	292.87	293.10	-9.31%	Brent Oil	74.44	75.03	0.79%
Sterling Pound (GBP)	382.24	380.75	-7.39%	Crude Oil	70.22	70.75	0.75%
Euro (EUR)	318.22	317.09	-11.02%	Gold	2,750.40	2,753.20	0.10%
Japanese Yen (JPY)	1.96	1.94	-14.95%	Copper	4.43	4.40	-0.77%
Chinese Yuan (CNY)	41.24	41.14	-9.35%	Aluminium	2,623.50	2,640.50	0.65%

Foreign Holding Trades



Foreign Purchases

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JOHN KEELLS HOLDINGS PLC	JKH.N0000	199	29,197,383
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WINDFORCE PLC	WIND.N0000	20.5	948,362
LANKA IOC PLC	LIOC.N0000	114	565,000
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ACCESS ENGINEERING PLC	AEL.N0000	23.6	231,220

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COMMERCIAL BANK OF CEYLON PLC (X)	COMB.X0000	82.5	(1,372,809)
LVL ENERGY FUND PLC	LVEF.N0000	5.8	(761,285)
HEMAS HOLDINGS PLC	HHL.N0000	80.5	(548,685)
HATTON PLANTATIONS PLC	HPL.N0000	28.8	(499,672)
NATIONAL DEVELOPMENT BANK PLC	NDB.N0000	77.5	(461,923)

UNION ASSURANCE PLC	UAL.N0000	55.1	114,000
SOFTLOGIC LIFE INSURANCE PLC	AAIC.N0000	58.7	105,860
NATIONS TRUST BANK PLC	NTB.N0000	132	66,276
ARPICO INSURANCE PLC	AINS.N0000	25	52,500
HATTON NATIONAL BANK PLC (X)	HNB.X0000	179	35,450
LANKEM DEVELOPMENTS PLC	LDEV.N0000	20	23,920
SOFTLOGIC CAPITAL PLC	SCAP.N0000	6.5	19,994
CITRUS LEISURE PLC	REEF.N0000	4.4	16,319
AGALAWATTE PLANTATIONS PLC	AGAL.N0000	33.5	9,983
LOLC HOLDINGS PLC	LOLC.N0000	419.25	1,680
YORK ARCADE HOLDINGS PLC	YORK.N0000	131.5	1,048
WASKADUWA BEACH RESORT PLC	CITW.N0000	2	1,000

VIDULLANKA PLC	VLL.N0000	14	(392,000)
KELANI CABLES PLC	KCAB.N0000	330.25	(363,440)
AGSTAR PLC	AGST.N0000	8.1	(173,907)
HAYLEYS PLC	HAYL.N0000	102	(173,298)
UNITED MOTORS LANKA PLC	UML.N0000	67.6	(143,665)
SWISSTEK (CEYLON) PLC	PARQ.N0000	24.9	(49,360)
CABLE SOLUTIONS LIMITED	CSLK.N0000	9.3	(32,540)
AMBEON CAPITAL PLC	TAP.N0000	14.3	(20,340)
PANASIAN POWER PLC	PAP.N0000	4.9	(17,050)
KELANI VALLEY PLANTATIONS PLC	KVAL.N0000	74.5	(15,180)
DIALOG AXIATA PLC	DIAL.N0000	11.2	(12,170)
VALLIBEL ONE PLC	VONE.N0000	52.9	(10,580)
HELA APPAREL HOLDINGS PLC	HELA.N0000	7.2	(7,200)
MAHARAJA FOODS LIMITED	MFPE.N0000	5.7	(5,180)
FIRST CAPITAL HOLDINGS PLC	CFVF.N0000	31	(95)

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