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Daily Market Watch

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ASPI Closes Flat as Late Selling Erases Early Gains....

Market Commentary

The Colombo Stock Exchange saw another day of choppy trading, with both indices opening in positive territory before retreating in the final 30 minutes. The ASPI closed marginally lower at 15,908.23, down 0.03%, while the S&P SL20 ended at 4,757.81, also posting a flat performance. The ASPI remains 7.5% below its all-time high reached on 18th February 2025, and has lost 0.2% year-to-date.

Market sentiment remained mixed, with 96 stocks gaining and 85 declining. Key positive contributors to the ASPI included Bukit Darah PLC (BUKI.N), Melstacorp PLC (MELS.N), and Dialog Axiata PLC (DIAL.N).

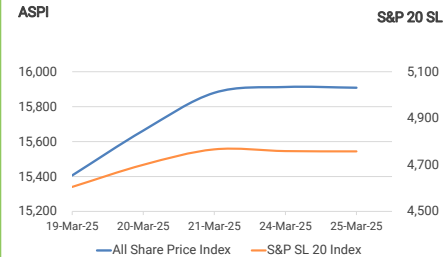
Turnover improved to LKR 2,908bn, largely driven by a significant volume of crossings. Sampath Bank (SAMP.N), John Keells Holdings (JKH.N), and Ceylon Cold Stores PLC (CCS.N) led the bulk of the crossings, with additional block trades in Browns Investments (BIL.N), Commercial Bank (COMB.N), Distilleries Company (DIST.N), Dipped Products (DIPD.N), Hemas Holdings (HHL.N), and Dialog Axiata (DIAL.N). The year-to-date average daily turnover now stands at LKR 4.41bn.

Sector-wise, banking, capital goods, and materials were the most actively traded. Despite early strength, late-session selling suggests that investors remain cautious, awaiting stronger catalysts for sustained momentum.

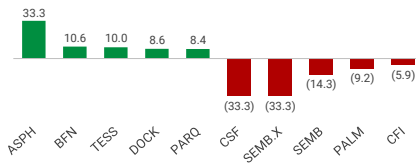
Market Performance

	25.03.2025	24.03.2025	%Change
All Share Price Index (ASPI)	15,908.23	15,912.61	(0.03)
S&P Sri Lanka 20 Index	4,757.81	4,759.06	(0.03)
Turnover (LKR mn)	2,898.21	1,902.56	52.33
Foreign Purchases (LKR mn)	135.61	29.29	362.92
Foreign Sales (LKR mn)	13.44	42.01	(68.00)
Market Cap (LKR bn)	5,633.11	5,618.93	0.25
Market Cap (USD bn)	18.98	18.94	0.25
Traded Companies	262	257	-
Market PER (x)	8.34	8.65	0.24
Price to Book (x)	1.10	1.10	-
Dividend Yield (%)	3.45	3.46	(0.01)

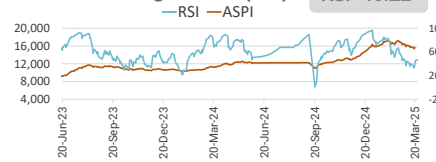
Market Benchmarks



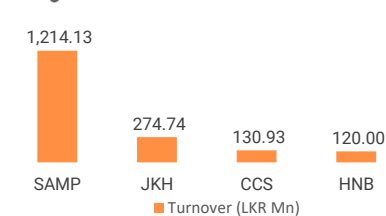
Top % Gainers and Losers



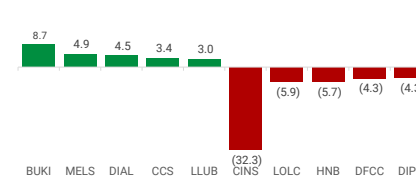
Relative Strength Index (RSI)



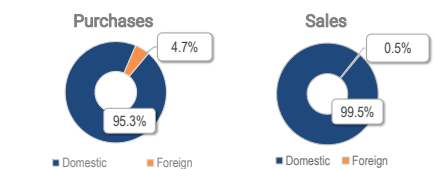
Largest Trades



Contributors to ASPI



Turnover Breakdown



Dividend Announcements

Company Code	Dividend (LKR)	XD Date	Payment Date
PACK	0.26	26.03.2025	17.04.2025
HNB.N	15.00	28.03.2025	21.04.2025
HNB.X	15.00	28.03.2025	21.04.2025
COMD	4.00	28.03.2025	22.04.2025
PABC	1.00	01.04.2025	23.04.2025
SAMP	9.35	01.04.2025	23.04.2025
LDEV	1.00	01.04.2025	10.04.2025
HASU	3.90	01.04.2025	23.04.2025
CSD	1.10	01.04.2025	23.04.2025
SEYB.N	3.50	01.04.2025	23.04.2025
SEYB.X	3.50	01.04.2025	23.04.2025
COMB.N	7.50	01.04.2025	23.04.2025
COMB.X	7.50	01.04.2025	23.04.2025
OSEA	1.35	24.04.2025	14.05.2025
DIAL	1.00	13.06.2025	02.07.2025

Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
Dialog Axiata PLC	DIAL	73.54
Hemas Holdings PLC	HHL	23.90
Ceylon Cold Stores PLC	CCS	20.34
Janashakthi Insurance PLC	JINS	3.74
Tokyo Cement PLC	TKYO	2.86
Total		135.61
Net Foreign Sales		
Lanka Tiles PLC	TILE	(9.33)
Sampath Bank PLC	SAMP	(2.20)
Sunshine Holdings PLC	SUN	(0.84)
Dialog Finance PLC	CALF	(0.29)
Ceylon Grain Elevators PLC	GRAN	(0.19)
Total		13.44

Key Rates

Prime Lending Rate (Weekly Avg. Weighted %)	8.44
Fixed Deposit Rate (Avg. Weighted %)	8.97
Treasury Bill Rate (364 Days %)	8.25
Consumer Price Inflation - CCPI (YoY %)	(4.20)