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Daily Market Watch

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ASPI surges shy of 1% Amid Record Turnover Backed by Major Block Deal....

Market Commentary

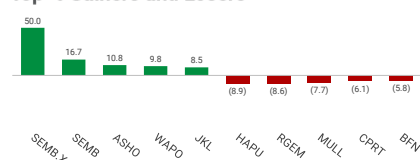
The Colombo bourse rallied sharply with the ASPI climbing 0.98% to close at 16,657.63, narrowing its loss from the all-time high to just 3.1% (536.16 points). Year-to-date, the index has gained 713.02 points or 4.5%. The S&P SL20 index also saw strong momentum, rising 1.45% to 4,909.07, reflecting broad-based buying in key blue-chip counters.

Market sentiment was buoyed by a significant block trade involving Hattton National Bank PLC (HNB.N), where Browns Investments PLC (BIL.N), the largest shareholder with a 9.99% stake as at 31st March 2025, exited its position at LKR 305.00 per share. This transaction alone added LKR 13.85Bn to the day's total turnover, which reached a staggering LKR 18.71Bn the second highest single-day turnover since 1st February 2021.

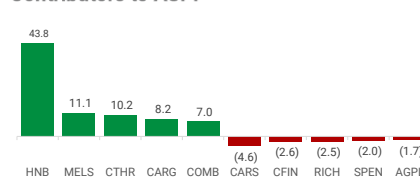
Gainers outpaced decliners with 102 companies advancing against 96 in the red. HNB.N, Melstacorp PLC (MELS.N), and C T Holdings PLC (CTHR.N) were the top contributors to the ASPI's upward movement.

Banks, food and beverages, and capital goods sectors dominated trading activity, with HNB.N, BIL.N, and Cargills Bank PLC (CBNK.N) emerging as the day's top turnover generators. The robust market activity far surpassed the YTD average daily turnover of LKR 3.86Bn, underscoring renewed investor confidence supported by strategic institutional movements.

Top % Gainers and Losers



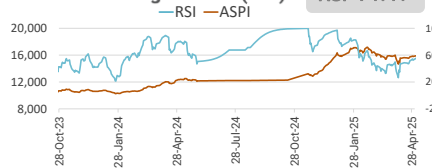
Contributors to ASPI



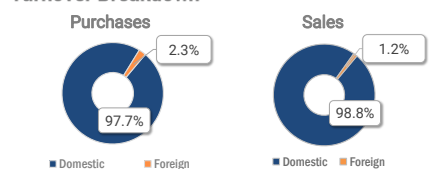
Market Performance

	27.05.2025	26.05.2025	%Change
All Share Price Index (ASPI)	16,657.63	16,496.24	0.98
S&P Sri Lanka 20 Index	4,909.07	4,838.94	1.45
Turnover (LKR mn)	18,709.41	3,760.45	397.53
Foreign Purchases (LKR mn)	434.02	206.23	110.45
Foreign Sales (LKR mn)	230.22	136.16	69.08
Market Cap (LKR bn)	5,993.67	5,949.77	0.74
Market Cap (USD bn)	20.01	19.86	0.74
Traded Companies	262	258	-
Market PER (x)	8.88	8.65	0.79
Price to Book (x)	1.17	1.17	-
Dividend Yield (%)	3.25	3.27	(0.02)

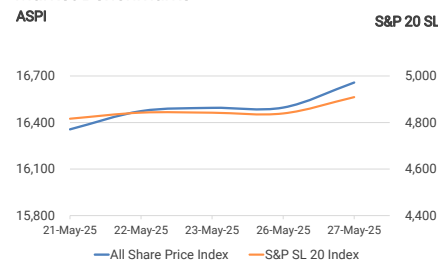
Relative Strength Index (RSI)



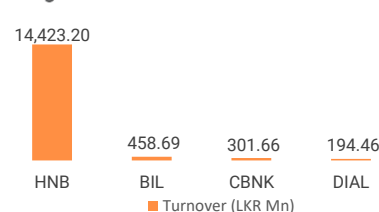
Turnover Breakdown



Market Benchmarks



Largest Trades



Key Rates

Prime Lending Rate (Weekly Avg. Weighted %)	8.47
Fixed Deposit Rate (Avg. Weighted %)	8.79
Treasury Bill Rate (364 Days %)	8.29
Consumer Price Inflation - CCPI (YoY %)	(2.00)

Dividend Announcements

Company Code	Dividend (LKR)	XD Date	Payment Date
CARG	11.70	29.05.2025	17.06.2025
CTHR	10.00	29.05.2025	18.06.2025
AEL	1.00	02.06.2025	20.06.2025
HARI	40.00	04.06.2025	24.06.2025
JKL	1.60	04.06.2025	24.06.2025
AHPL	0.50	05.06.2025	25.06.2025
JKH	0.05	05.06.2025	25.06.2025
ASIY	0.23	05.06.2025	25.06.2025
KHL	0.10	05.06.2025	25.06.2025
DIAL	1.00	13.06.2025	02.07.2025
UCAR	36.00	16.06.2025	03.06.2025
LIOC	5.00	20.06.2025	09.07.2025
BALA	1.00	25.06.2025	15.07.2025
HHL	0.70	26.06.2025	16.07.2025
MAL.N	0.20	26.06.2025	16.07.2025
MAL.X	0.20	26.06.2025	16.07.2025
CIND	6.00	27.06.2025	17.07.2025
SLTL	0.25	27.06.2025	17.07.2025
LFIN	4.25	01.07.2025	21.07.2025
CHMX	2.50	01.07.2025	21.07.2025
CFIN	3.75	01.07.2025	07.07.2025
LHL	3.00	01.07.2025	21.07.2025
GLAS	2.26	23.07.2025	12.08.2025
ASHO	20.00	12.08.2025	29.08.2025

Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
Dialog Axiata PLC	DIAL	137.42
Aitken Spence PLC	SPEN	103.36
Melstacorp PLC	MELS	103.29
Richard Pieris and Company PLC	RICH	15.58
PGP Glass Ceylon PLC	GLAS	8.80
Total		434.02
Net Foreign Sales		
Sampath Bank PLC	SAMP	(43.62)
Access Engineering PLC	AEL	(42.48)
R I L Property PLC	RIL	(22.52)
Hattton National Bank PLC	HNB	(18.49)
Royal Ceramics Lanka PLC	RCL	(11.74)
Total		230.22