DAILY EQUITY WATCH

First Capital
A Janashakthi Group Company

July 20, 2026

"Colombo Bourse declines amid escalating Middle East tensions"

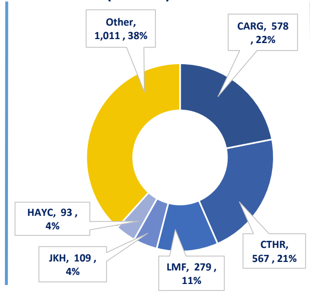
The Colombo Bourse closed in negative territory today, with the ASPI declining by 197 points to close at 21,208, while the S&P SL20 fell 56 points to close at 5,943. Investor sentiment remained subdued amid ongoing geopolitical tensions in the Middle East, weighing on market confidence. HNW investor participation remained active, supported by several negotiated crossings, while retail participation was at average levels. The main negative contributors to the ASPI were DIAL, COMB, RICH, JKH, and CARS. Daily turnover stood at LKR 2.6Bn, marking an increase of 60.1% over the monthly average of LKR 1.6Bn. Food & Staples Retailing sector led the daily turnover with a share of 43%, followed by the Food Beverage & Tobacco, and Capital Goods sectors collectively contributing 27%. Foreign investors turned net buyers, posting a net inflow of LKR 23.5Mn.

	LKR	USD	
TURNOVER (Mn)	2,635.82	7.88	▲ 264.8%
MARKET CAP. (Bn)	7,677.21	22.95	▼ -1.0%
VOLUME (Mn)	66.49		▲ 108.2%

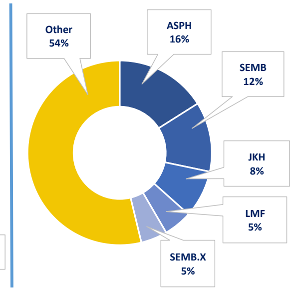
	Inflow	Outflow	Net flow
FOREIGN (LKR Mn)	108.13	84.67	23.47

VALUATIONS	PER	11.2x	PBV	1.3x

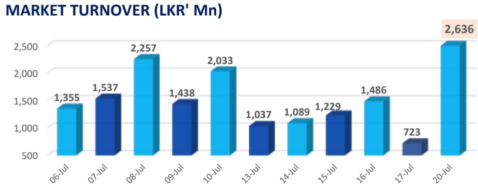
TOP TURNOVER CONTRIBUTORS (LKR'Mn)



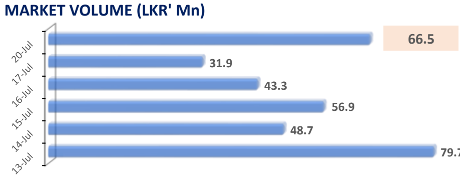
TOP VOLUME CONTRIBUTORS



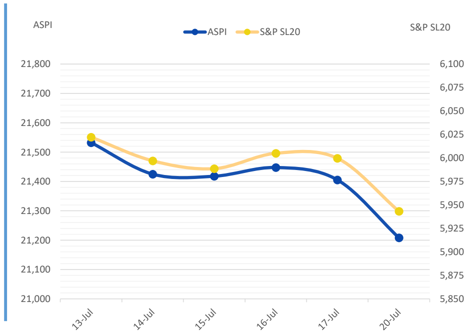
MARKET TURNOVER (LKR' Mn)



MARKET VOLUME (LKR' Mn)



MARKET INDICES



ASPI	21,208.10	
Intraday Points	-197.31	-0.92%
S&P SL20	5,943.22	
Intraday Points	-56.46	-0.94%

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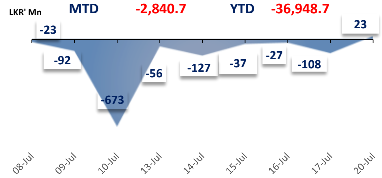
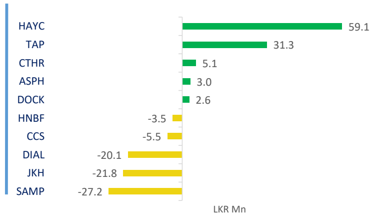
NET FOREIGN FLOW

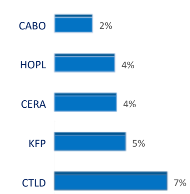
	MTD	YTD
LKR' Mn	-2,840.7	-36,948.7



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS