DAILY EQUITY WATCH

First Capital

October 13, 2026

"ASPI further weakens closer to 20,000 mark"

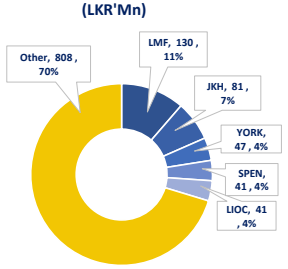
Yesterday's negativity continued today as well, in the Colombo Stock Exchange. Despite opening at a higher note, the market experienced a steep decline throughout the latter half. The ASPI further weakened by 183 points to close at 20,077, almost closer to the 20,000 mark. Moreover, the S&P SL20 closed at 5,730, shedding 53 points. DIAL, COMB, HNB, JKH, and RICH were the top negative contributors to the ASPI. Higher retail investor engagement drove the turnover, although it underpinned the drop in ASPI, due to margin calls on penny stocks held by retail investors. As opposed to yesterday, HNW investors remained subdued. Turnover stood at approximately LKR 1.1Bn, marking a decrease of 20.4% over the monthly average of LKR 1.4Bn. Food, Beverage & Tobacco sector led the daily turnover with a share of 22%, followed by the Capital Goods, and Banking sectors collectively contributing 33%. Foreign investors remained net buyers, posting a net inflow of LKR 22.6Mn.

	LKR	USD		
TURNOVER (Mn)	1,148.69	3.43	▼	-3.8%
MARKET CAP. (Bn)	7,259.48	21.70	▼	-0.9%
VOLUME (Mn)	78.94		▲	69.5%

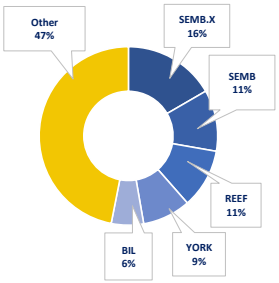
	Inflow	Outflow	Net flow
FOREIGN (LKR Mn)	34.09	11.51	22.58

VALUATIONS	PER	10.4x	PBV 1.2x

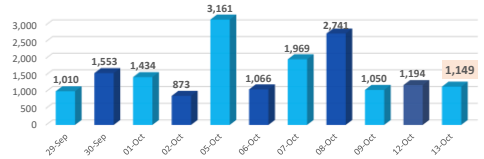
TOP TURNOVER CONTRIBUTORS (LKR'Mn)



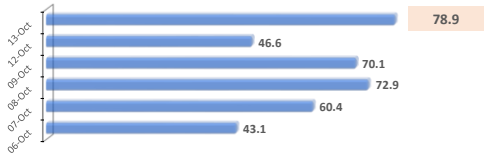
TOP VOLUME CONTRIBUTORS



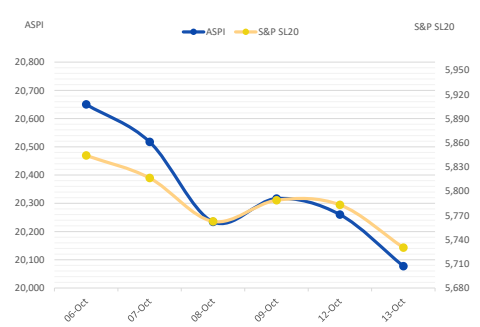
MARKET TURNOVER (LKR' Mn)



MARKET VOLUME (LKR' Mn)



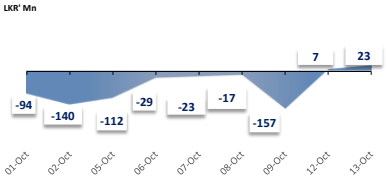
MARKET INDICES



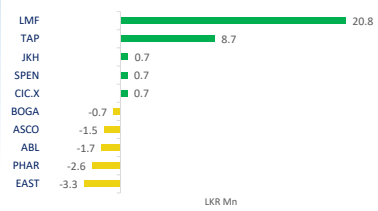
ASPI	20,077.48	
Intraday Points	-182.58	
	-0.90%	
S&P SL20	5,730.10	
Intraday Points	-52.93	
	-0.92%	

NET FOREIGN FLOW

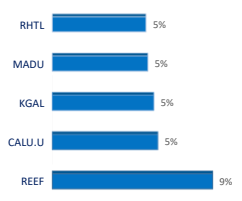
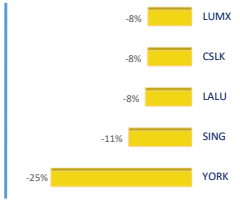
MTD -544.3 YTD -57,839.3



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS