



First Capital
A Janashakthi Group Company

DAILY EQUITY WATCH



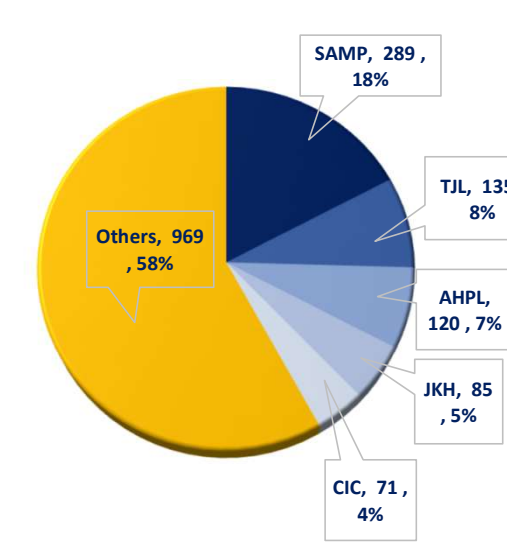
August 31, 2023

“Index lingers in the red, pressured by month-end selling”

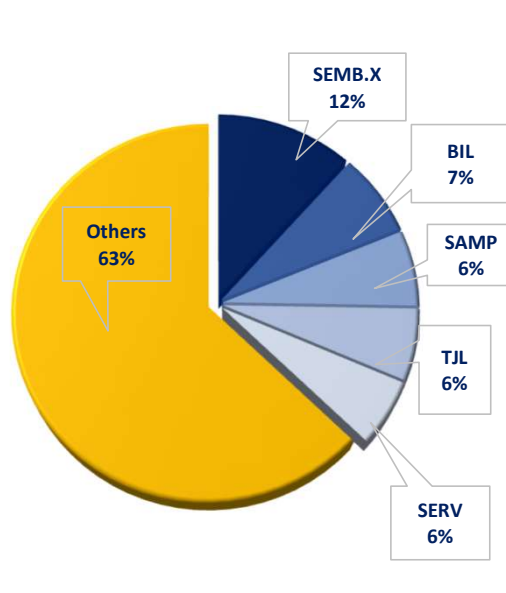
Bourse closed in the red zone for the 5th consecutive session influenced by month-end selling pressure predominantly on Banks and index heavy-weights. ASPI experienced a day of mild volatility while continuing to experience losses, losing 51 points to conclude at 11,114. Notably, during the day's trading, shares of SAMP, HNB, and JKH garnered considerable interest from local high-net-worth investors. Simultaneously, the hotel sector experienced a bullish sentiment, with share prices rising in anticipation of the upcoming peak tourism season set to commence in September. Meanwhile, Poultry based shares too witnessed activities with the expected dip in chicken prices after the lifting of the import ban on maize. Market turnover continued to remain thin as it was recorded at LKR 1.7Bn (-50% cf. monthly average turnover of LKR 3.3Bn) amidst limited participation and continuous selling observed over the last few sessions while Banking sector (23%) and Capital Goods sector (17%) accounted for a joint contribution of 40%.

	LKR	USD		
TURNOVER (Mn)	1,669.07	5.22	▲	1.3%
MARKET CAP. (Bn)	4,441.26	13.88	▲	0.1%
VOLUME (Mn)	63.50		▲	34.9%
FOREIGN (LKR Mn)	68.71	199.49		
VALUATIONS	PER 5.9x	PBV 1.0x		
	Inflow	Outflow	Net flow	

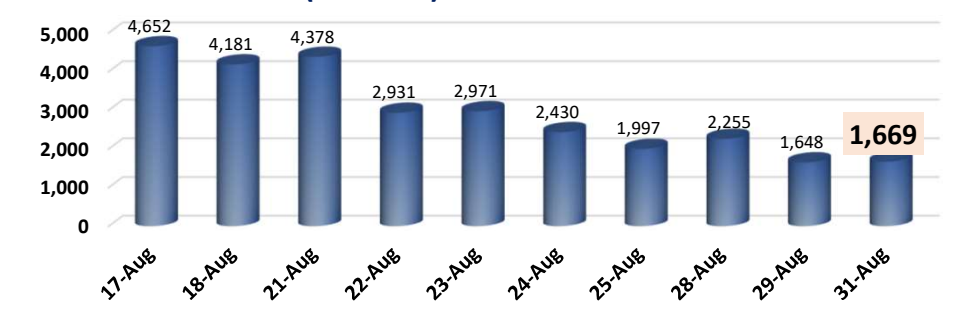
TOP TURNOVER CONTRIBUTORS (LKR'Mn)



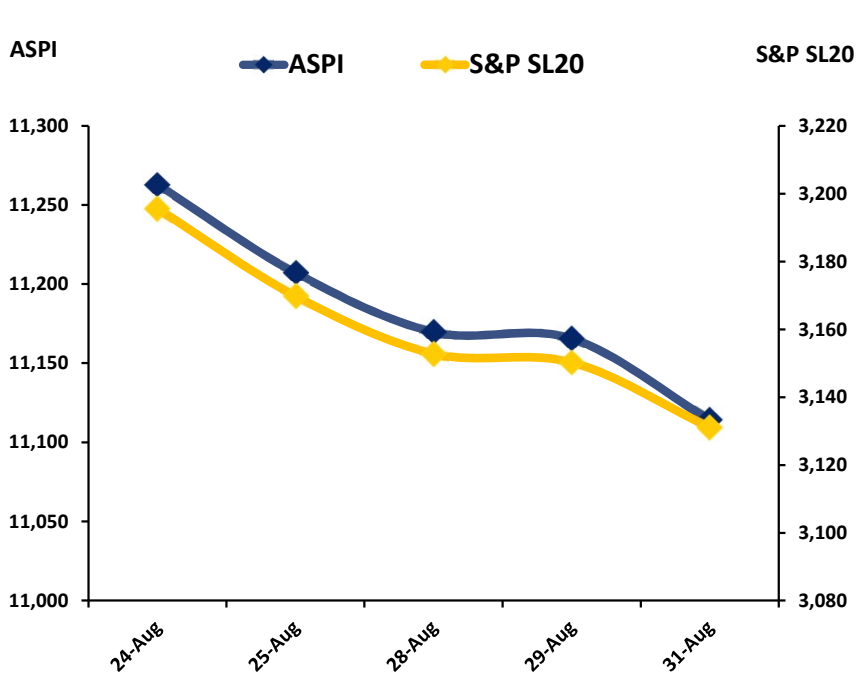
TOP VOLUME CONTRIBUTORS



MARKET TURNOVER (LKR' Mn)

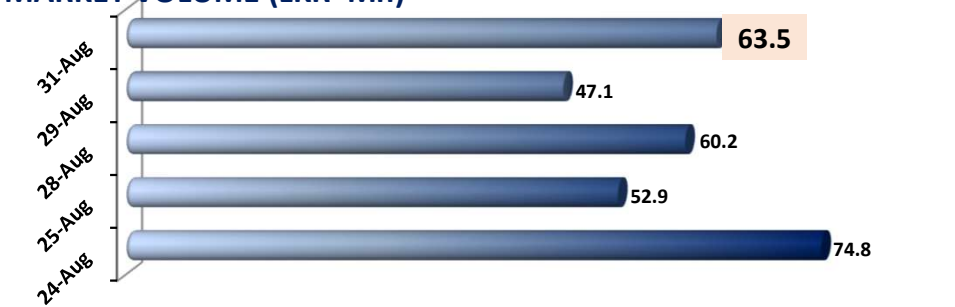


MARKET INDICES

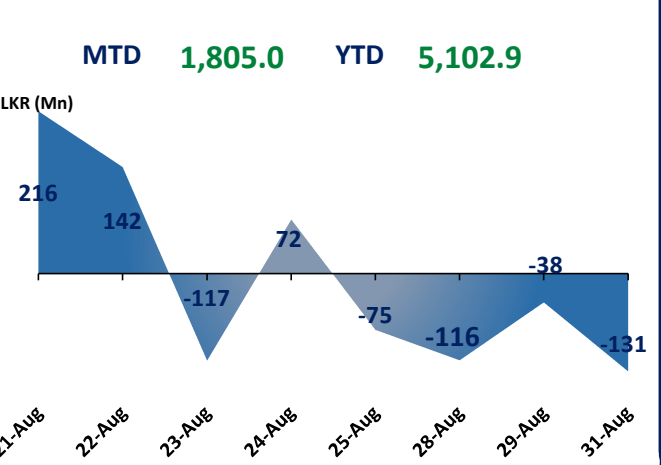


ASPI	11,114.17
Intraday Points	-51.42
	-0.46%
S&P SL20	3,131.07
Intraday Points	-19.19
	-0.61%

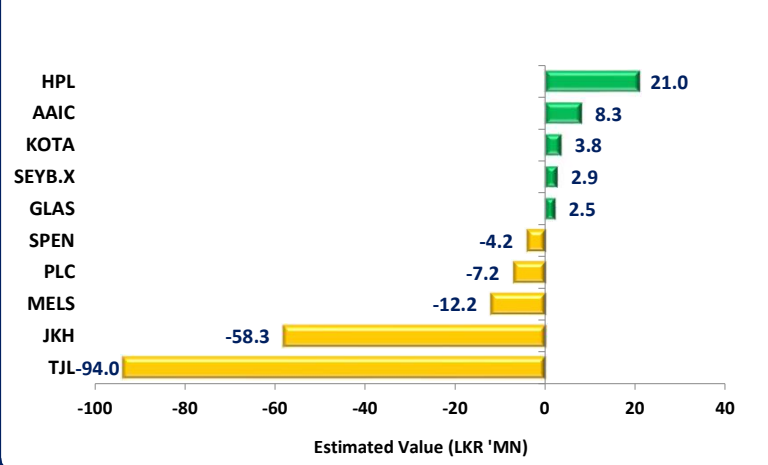
MARKET VOLUME (LKR' Mn)



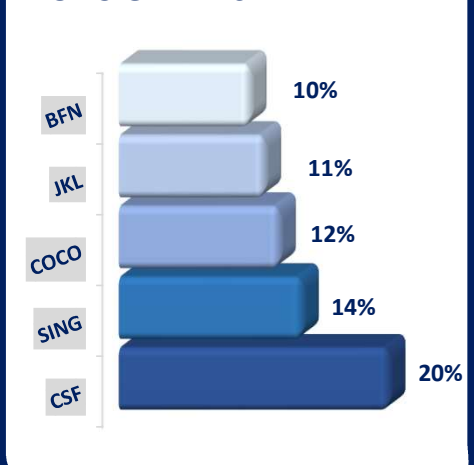
NET FOREIGN FLOW



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS

