

June 23, 2025

"Geopolitical crisis triggers heavy sell-off in CSE"

The Colombo bourse saw its biggest intraday loss since 9th April 2025, as escalating tensions in the Middle East spooked investors. Retail selling pressure dominated the session, pushing the market into a bearish start to the week. The ASPI plunged sharply in the first few minutes of trading and continued to remain low throughout the day, ultimately closing at 16,765, losing 323 points. Additionally, almost every sector suffered from widespread price decreases. SAMP, COMB, JKH, MELS, and HAYL emerged as the key negative contributors to the index. Turnover stood at LKR 2.5Bn, marking a 51% decrease compared to the monthly average of LKR 5.1Bn. The Banking sector led today's turnover, contributing 26%, followed by the Capital Goods, and Diversified Financials sectors, jointly accounting for 30%. Foreign investors remained net buyers, with a net inflow of LKR 69.3Mn.

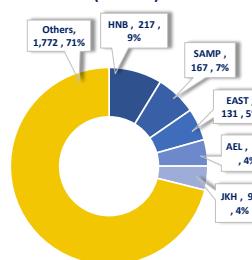


First Capital
A Jansiri Group Company

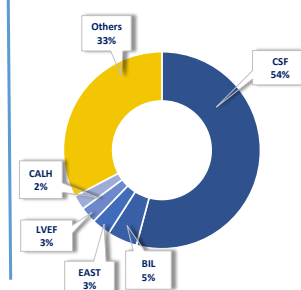


	LKR	USD	
TURNOVER (Mn)	2,492.69	8.49	▼ -0.4%
MARKET CAP. (Bn)	6,006.09	20.45	▼ -1.8%
VOLUME (Mn)	193.86		▲ 96.1%
FOREIGN (LKR Mn)	166.74	97.48	69.26
VALUATIONS	PER 8.0x	PBV 1.1x	

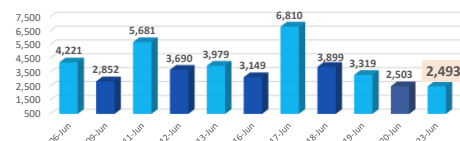
TOP TURNOVER CONTRIBUTORS (LKR'Mn)



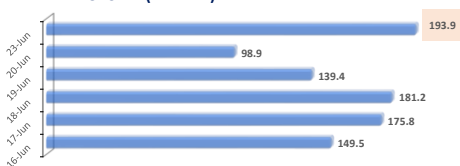
TOP VOLUME CONTRIBUTORS



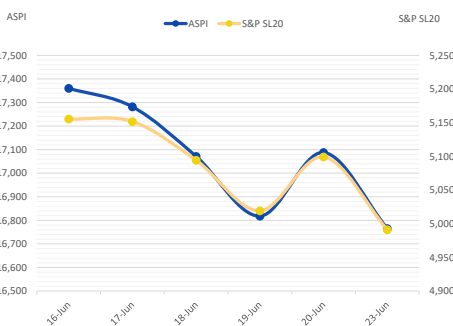
MARKET TURNOVER (LKR' Mn)



MARKET VOLUME (LKR' Mn)



MARKET INDICES



ASPI 16,765.40

Intraday Points -322.55
-1.89%

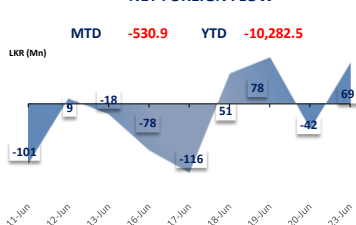
S&P SL20 4,991.18

Intraday Points -108.10
-2.12%

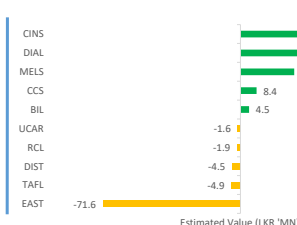


First Capital
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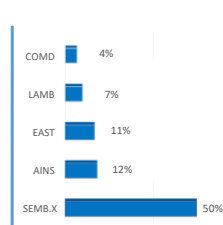
NET FOREIGN FLOW



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS

