

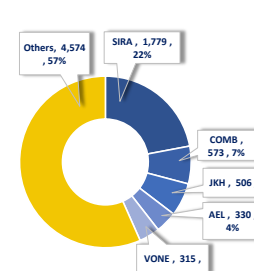
September 22, 2025

"Construction sector optimism sustains bullish momentum"

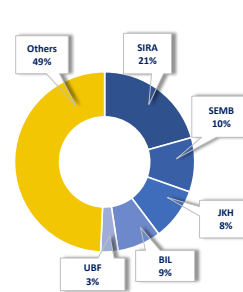
The Colombo Bourse opened the week on a positive note, extending the bullish momentum carried over from the end of last week. ASPI marked a gain of 142 points and closed at 21,227 by the end of the session. Moreover, the session stood out with robust investor activity and above-average turnover. JKH, CTHR, SFCL, COMB and VONE were the top positive contributors to the index. Both retail and HNW participation drove today's rally, while HNW participation was mainly observed towards Construction sector and larger Hotel sector counters. Positive investor sentiment towards the Construction sector could have possibly been driven by the country's economic expansion by 4.9% in 2Q25. Turnover for the day reached LKR 8.18n, reflecting an increase of 8% compared to the monthly average that stands at around LKR 7.5Bn. In terms of sector-wise contribution to turnover, the Capital Goods sector took the lead with a share of 45%, followed by the combined contribution of 28% from Banking sector and Diversified Financials sector. Foreign investors remained net buyers, recording a net inflow of LKR 584.1Mn.

	LKR	USD	
TURNOVER (Mn)	8,076.37	27.50	▲ 24.1%
MARKET CAP. (Bn)	7,524.34	25.62	▲ 0.6%
VOLUME (Mn)	276.32		▼ -26.7%
FOREIGN (LKR Mn)	660.95	76.82	Net flow
VALUATIONS	PER 9.3x	PBV 1.4x	584.12

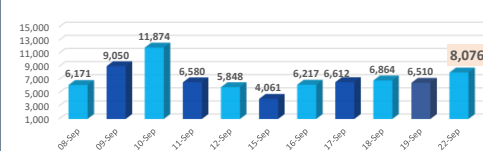
TOP TURNOVER CONTRIBUTORS (LKR'Mn)



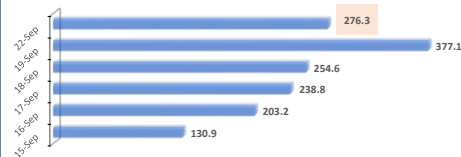
TOP VOLUME CONTRIBUTORS



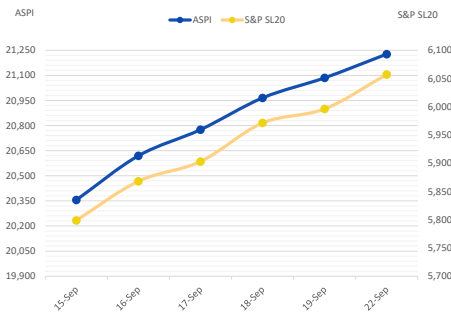
MARKET TURNOVER (LKR' Mn)



MARKET VOLUME (LKR' Mn)



MARKET INDICES

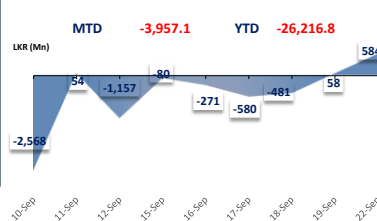


ASPI 21,226.87
Intraday Points 141.78
0.67%

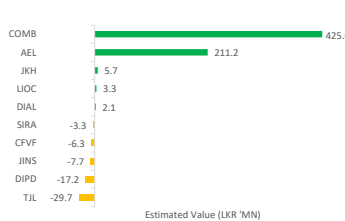
S&P SL20 6,057.13
Intraday Points 60.97
1.02%



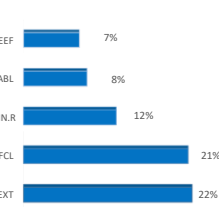
NET FOREIGN FLOW



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS

