November 3, 2025

"ASPI grows through calm"

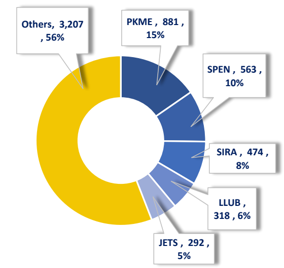
The Colombo Bourse depicted a slightly volatile trading session during the first half, then steadily moved upward during the latter half. Cautious investor activities were observed ahead of the upcoming national budget. However, the ASPI closed in positive territory, inching up to 22,928, up by 123 points. Although the retail participation was modest, higher HNW participation drove the rally. HNW investors were keen on PKME, driven by reported results for the Sep-25 ended quarter and positive outlook for the share. Key positive contributors to the index included SFCL, BUKI, JKH, COMB and DIAL. Market turnover amounted to LKR 5.7Bn, reflecting a 23% decline compared to the monthly average of LKR 7.5Bn. The Capital Goods sector led total turnover, contributing 27%, followed by the Transportation and Materials sectors, which collectively accounted for 27%. Meanwhile, foreign investors remained net sellers, recording a net outflow of LKR 654.5Mn for the day.

	LKR	USD		
TURNOVER (Mn)	5,733.52	18.99	▲	2.3%
MARKET CAP. (Bn)	8,172.31	27.06	▲	0.6%
VOLUME (Mn)	158.12		▲	2.1%

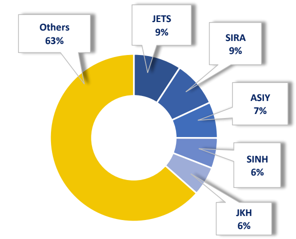
	Inflow	Outflow	Net flow
FOREIGN (LKR Mn)	483.58	1,129.06	-645.47

VALUATIONS	PER	10.1x	PBV	1.5x

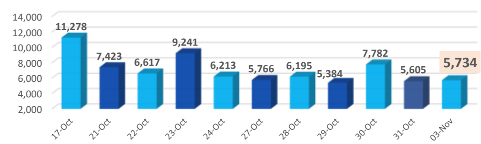
TOP TURNOVER CONTRIBUTORS (LKR'Mn)



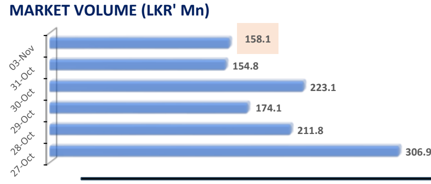
TOP VOLUME CONTRIBUTORS



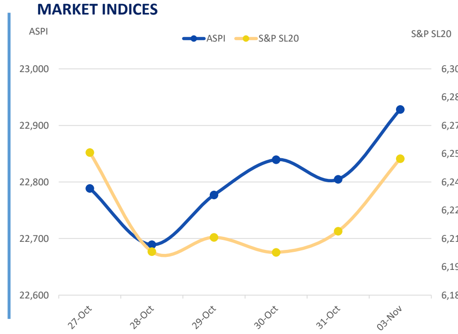
MARKET TURNOVER (LKR' Mn)



MARKET VOLUME (LKR' Mn)



MARKET INDICES



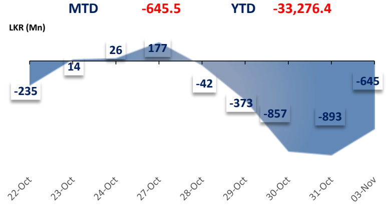
ASPI	22,928.31
Intraday Points	123.47
	0.54%

S&P SL20	6,252.40
Intraday Points	38.49
	0.62%

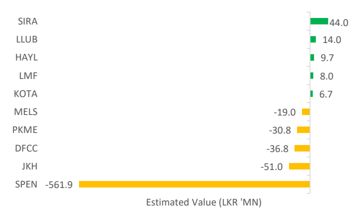
First Capital

NET FOREIGN FLOW

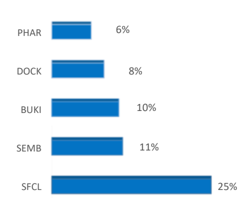
MTD	-645.5	YTD	-33,276.4



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS