

# DAILY EQUITY WATCH

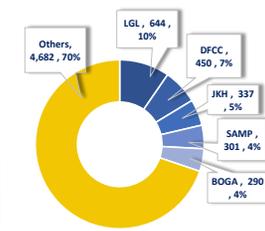
November 7, 2025

**"Market strengthens on budget-day optimism"**

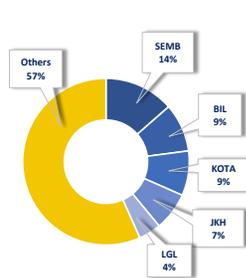
The Colombo Bourse extended its positive momentum as the national budget was presented today, with the ASPI surging 226 points to close at 23,338. Investor focus was largely directed towards Banking sector counters, while retail participation remained robust and HNW activity continued at a moderate level. Key positive contributors to the index included SFCL, COMB, SAMP, HNB, and VONE. Market turnover stood at LKR 6.7Bn, reflecting a 7% decline from the monthly average of LKR 7.2Bn. The Banking sector led market activity, accounting for 23% of total turnover, followed by the Capital Goods and Food, Beverage & Tobacco sectors, which collectively contributed 32%. Meanwhile, foreign investors remained net sellers, posting a net outflow of LKR 91.5Mn for the day.

	LKR	USD		
TURNOVER (Mn)	6,705.67	22.20	▲	10.6%
MARKET CAP. (Bn)	8,332.46	27.59	▲	1.1%
VOLUME (Mn)	208.54		▲	11.5%
FOREIGN (LKR Mn)	143.41	234.86		Net flow -91.45
VALUATIONS	PER 10.3x	PBV 1.5x		

TOP TURNOVER CONTRIBUTORS (LKR'Mn)



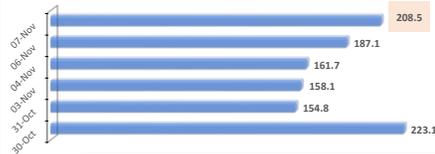
TOP VOLUME CONTRIBUTORS



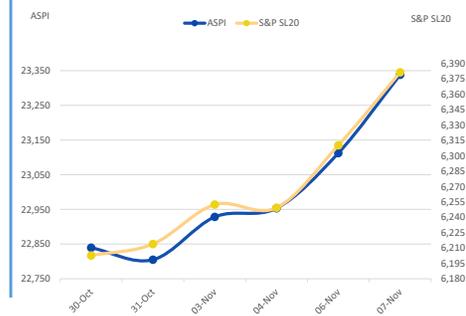
MARKET TURNOVER (LKR' Mn)



MARKET VOLUME (LKR' Mn)



MARKET INDICES



ASPI	23,338.25
Intraday Points	225.77
	0.98%
S&P SL20	6,381.47
Intraday Points	71.21
	1.13%



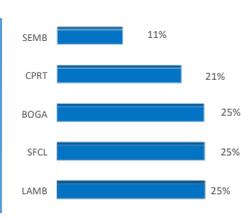
NET FOREIGN FLOW



LARGEST & LOWEST NET FOREIGN FLOW



TOP 5 GAINERS



TOP 5 LOSERS

