

ASPI [^] 0.04% | S&P SL20 ^v 2.09%

Key statistics... **P1**

The benchmark index remained... **Cont. P2**

Weekly foreign movement... **Cont. P3**

The Bourse ended the week **Cont. P4**

Economic Snapshot..... **P6**

KEY STATISTICS

Week ending	18-Dec	11-Dec	+/-
ASPI	6,616.95	6,614.56	0.04%
S&P SL20	2,572.95	2,627.81	-2.09%
Banks	580.20	598.53	-3.06%
Capital Goods	996.76	1,001.20	-0.44%
Food, Beverage & Tobacco	941.93	925.31	1.80%
Consumer Durables & Apparel	1,087.07	1,115.89	-2.58%
Materials	1,278.83	1,275.22	0.28%
Diversified Financials	895.63	898.55	-0.32%
Turnover (LKR Bn)	14.39	19.60	-26.60%
Foreign Buying (LKR Mn)	389.04	1,051.71	-63.01%
Foreign Selling (LKR Mn)	771.19	2,365.92	-67.40%
Daily Average Turnover (LKR Bn)	2.88	3.92	-26.60%
Daily Average Foreign Buying (LKR Mn)	77.81	210.34	-63.01%
Daily Average Foreign Selling (LKR Mn)	154.24	473.18	-67.40%

TOP 10 GAINERS

Company	Code	Opening Price	Closing Price	WoW % Change
HARISCHANDRA	HARI N	2163.6	3106.0	43.6%
E B CREASY	EBCRN	2465.2	3398.1	37.8%
SELINSING	SELIN	700.0	915.2	30.7%
ASIRI	ASIRN	26.4	31.9	20.8%
ASIRI SURG	AMSLN	15.0	18.1	20.7%
LANKA VENTURES	LVENN	50.0	59.9	19.8%
SHALIMAR	SHALN	1030.5	1203.2	16.8%
LANKA HOSPITALS	LHCLN	45.0	52.4	16.4%
GOOD HOPE	GOODN	947.2	1096.9	15.8%
BROWNS	BRWNN	86.9	99.1	14.0%

TOP 10 LOSERS

Company	Code	Opening Price	Closing Price	WoW % Change
SERENDIB HOTELS[NV]	SHOTX	12.8	10.8	-15.6%
S M B LEASING	SEMBN	0.7	0.6	-14.3%
BLUE DIAMONDS	BLUEN	0.8	0.7	-12.5%
ABANS	ABANN	146.9	130.2	-11.4%
HNB FINANCE[NV]	HNBFX	9.5	8.5	-10.5%
NATION LANKA	CSFN	1.0	0.9	-10.0%
SERENDIB HOTELS	SHOTN	20.5	18.5	-9.8%
INDO MALAY	INDON	1242.7	1123.2	-9.6%
STANDARD CAPITAL	SINGN	129.1	117.8	-8.8%
CEYLON PRINTERS	CPRTN	70.6	65.3	-7.5%

Market Review

Indices |

The Bourse ended the week on a mixed note this week with ASPI increasing by 2.39 points (or 0.04%) to close at 6,616.95 points, while the S&P SL20 Index decreased by 54.86 points (or 2.09%) to close at 2,572.95 points.

Turnover & Market Capitalization |

Browns Investments was the highest contributor to the week's turnover value, contributing LKR 4.00Bn or 27.78% of total turnover value. JKH followed suit, accounting for 6.03% of turnover (value of LKR 0.87Bn) while Serendib Hotels contributed LKR 0.62Bn to account for 4.33% of the week's turnover. Total turnover value amounted to LKR 14.39Bn (cf. last week's value of LKR 19.60), while daily average turnover value amounted to LKR 2.88Bn (-26.60% W-o-W) compared to last week's average of LKR 3.92Bn. Market capitalization meanwhile, increased by 0.04% W-o-W (or LKR 1.05Mn) to LKR 2,891.73 Bn cf. LKR 2,890.68 Bn last week.

Liquidity(Value & Volume) |

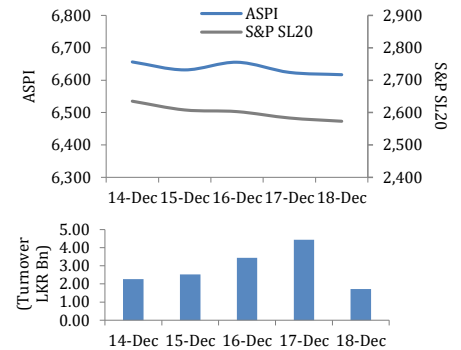
The Food, Beverage & Tobacco Industry Group was the highest contributor to the week's total turnover value, accounting for 37.70% (or LKR 5.42Bn) of market turnover. Industry Group's turnover was driven primarily by Browns Investments, Melstacorp & Hatton Plantations which accounted for 88.63% of the sector's total turnover. Capital Goods Industry Group meanwhile accounted for 18.06% of the total turnover value while Material Industry Group contributed 12.39%.

The Food, Beverage & Tobacco Industry Group dominated the market in terms of share volume, accounting for 68.56% (or 1.05Bn shares) of total volume, with a value contribution of LKR 5.42Bn. The Consumer Services Industry Group followed suit, adding 5.24% to total volume(80.05Mn shares) while Materials contributed 3.79%(57.82Mn shares).

Net Foreign Position |

Foreign investors were net sellers this week with total net outflow amounting to LKR 0.38Bn relative to last week's total net outflow of LKR 1.31Bn (+70.9% W-o-W). Total foreign purchases decreased by 63.0% W-o-W to LKR 0.39Bn from last week's value of LKR 1.05Bn, while total foreign sales amounted to LKR 0.77Bn relative to LKR 2.37Bn recorded last week (-67.4% W-o-W).

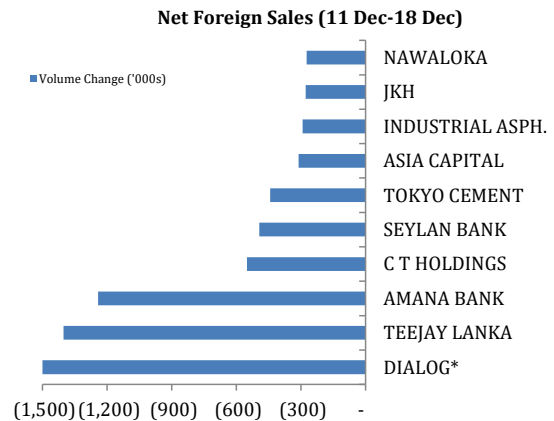
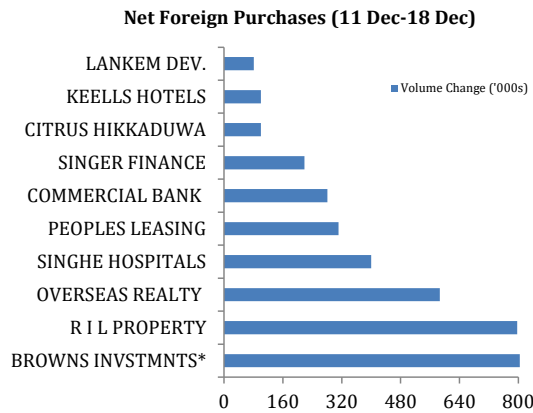
Indices vs. Turnover (14th Dec - 18th Dec)



TOP 10 TURNOVERS

Company	Code	Industry Group	Opening Price	Closing Price	Value (Rs. Mn)	Contribution to Total Turnover
BROWNS INVSTMENTS	BIL N	FOOD BEVERAGE AND TOBACCO	3.5	3.9	3,997.8	27.8%
JKH	JKH N	CAPITAL GOODS	152.0	150.0	867.6	6.0%
SERENDIB HOTELS	SHOTN	CONSUMER SERVICES	20.5	18.5	622.7	4.3%
MELSTACORP	MELSN	FOOD BEVERAGE AND TOBACCO	47.6	50.1	518.5	3.6%
HEMAS HOLDINGS	HHL N	CAPITAL GOODS	95.3	93.0	479.0	3.3%
EXPOLANKA	EXPON	TRANSPORTATION	26.0	25.6	477.6	3.3%
TOKYO CEMENT[NV]	TKYOX	MATERIALS	57.1	62.3	428.1	3.0%
TOKYO CEMENT	TKYON	MATERIALS	66.2	70.8	398.2	2.8%
BROWNS	BRWNN	CAPITAL GOODS	86.9	99.1	299.9	2.1%
HATTON	HPL N	FOOD BEVERAGE AND TOBACCO	9.4	9.5	291.1	2.0%

Market Review (Cont'd)



*Volume change of Browns Investments (2.31Mn Share)& Dialog Axiata (10.32Mn Shares) from 11th Dec- 18th Dec not displayed.

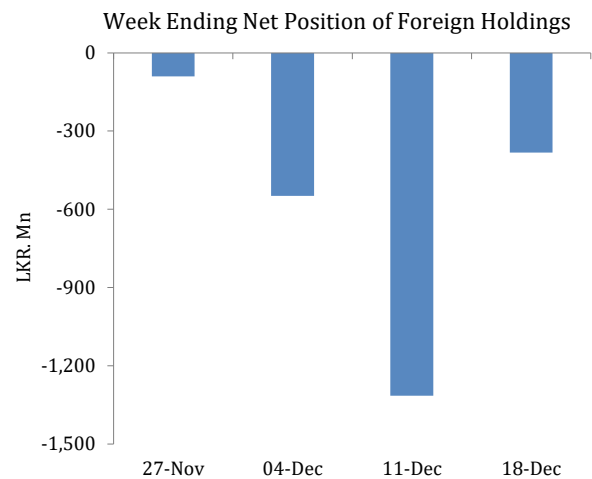
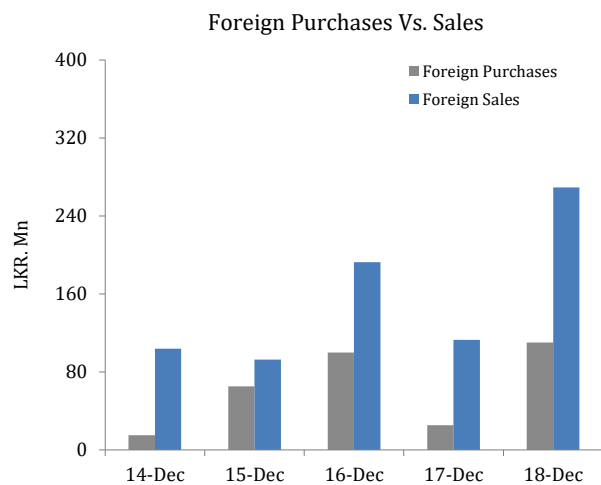
Net Foreign Purchases (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	18/12/20	11/12/20		
COMMERCIAL BANK	24.34%	24.31%	281,000	22.48
HNB	23.42%	23.40%	73,808	9.18
BROWNS INVSTMNTS	0.31%	0.29%	2,310,213	9.01
OVERSEAS REALTY	90.34%	90.30%	586,815	8.45
R I L PROPERTY	29.95%	29.85%	797,000	7.17
RICH PIERIS EXP	1.75%	1.62%	13,729	4.72
ROYAL CERAMIC	1.98%	1.95%	25,501	4.06
PEOPLES LEASING	4.44%	4.42%	311,233	3.95
SINGER FINANCE	0.27%	0.16%	218,378	3.25
ASIRI	35.71%	35.71%	61,086	1.95

Net Foreign Sales (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	18/12/20	11/12/20		
DIALOG	91.98%	92.10%	(10,324,724)	(126.0)
C T HOLDINGS	13.38%	13.65%	(550,935)	(89.6)
TEEJAY LANKA	47.18%	47.38%	(1,402,720)	(53.2)
JKH	38.92%	38.94%	(277,998)	(41.7)
TOKYO CEMENT	20.01%	20.17%	(442,420)	(31.3)
SEYLAN BANK	1.29%	1.48%	(493,795)	(22.2)
SWISSTEK	1.09%	1.52%	(117,836)	(10.3)
CEYLON TOBACCO	96.98%	96.99%	(9,325)	(9.4)
AITKEN SPENCE	21.48%	21.51%	(140,090)	(8.0)
DOLPHIN HOTELS	0.95%	1.48%	(165,551)	(4.6)

Note: *Value based on closing price and not on actual traded price
Please note that the foreign shares data displayed above include private transfers done outside of the market.



Announcements for the Week

Dividend Announcements

<u>Company</u>	<u>DPS(Rs.)</u>	<u>Dividend Type</u>	<u>Date(XD)</u>
THE AUTODROME PLC	0.30	Final dividend	24/12/2020

Crossings for the Week

Crossings

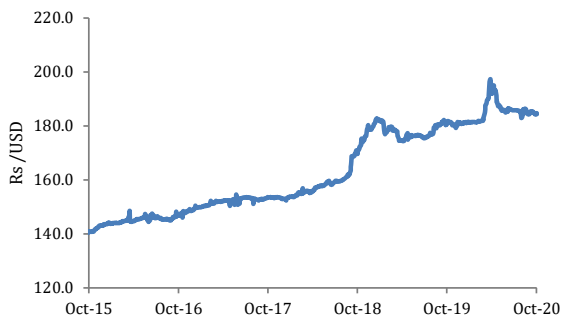
<u>Company</u>	<u>Quantity</u>	<u>Turnover(Rs. Mn)</u>	<u>% of Total Crossings</u>
ASIRI	730,000	20.08	2.7%
DIALOG	4,200,000	51.88	6.9%
DIPPED PRODUCTS	100,000	32.00	4.3%
AHOT PROPERTIES	1,900,000	77.90	10.4%
JKH	250,000	37.50	5.0%
LANKA HOSPITALS	475,000	25.41	3.4%
PANASIAN POWER	5,724,471	24.62	3.3%
DISTILLERIES	1,000,000	21.00	2.8%
HEMAS HOLDINGS	296,375	28.75	3.8%
SOFTLOGIC LIFE	29,065,923	290.66	38.8%
TOKYO CEMENT	500,000	29.55	3.9%
COMMERCIAL BANK	800,000	64.00	8.6%
MELSTACORP	500,000	24.90	3.3%
TEEJAY LANKA	527,000	20.03	2.7%

Economic Snapshot

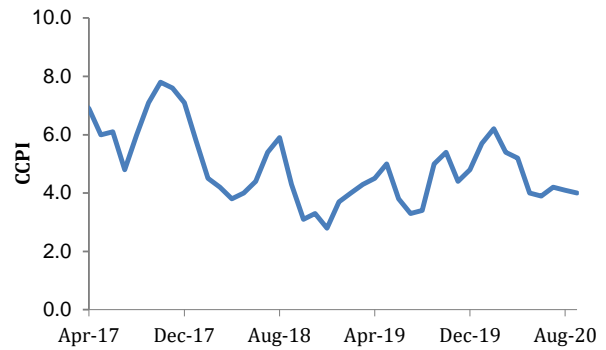
	Apr'20	May'20	Jun'20	Jul'20	Aug'20	Sep'20	Oct'20	Nov'20
Interest Rates								
Prime Lending Rate	9.38	9.28	8.78	7.79	7.01	6.42	6.10	5.95
Ave. Wtd. Deposit Rates	7.77	7.57	7.38	7.16	6.44	6.44	6.23	6.01
Ave. Wtd. Fixed Dep. Rates	9.51	9.26	9.00	8.69	8.26	7.90	7.59	7.37
CCPI Inflation Y-o-Y % (Base 2013)	5.2	4.0	3.9	4.2	4.1	4.0	4.0	4.1
GDP Growth (Base 2010)								
	2013	2014	2015	2016	2017	2018	2019	
	3.4%	5.0%	5.0%	4.5%	3.6%	3.3%	2.3%	

Source Central Bank

Exchange Rate, Rs. vs. US\$

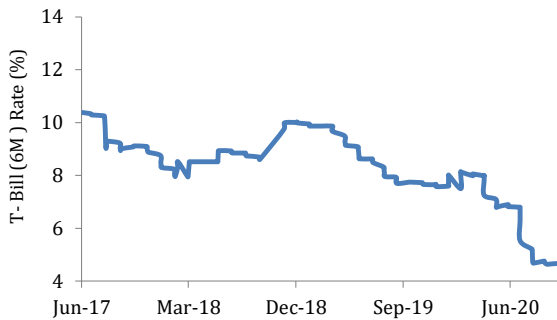


Inflation (CCPI-N) YoY%



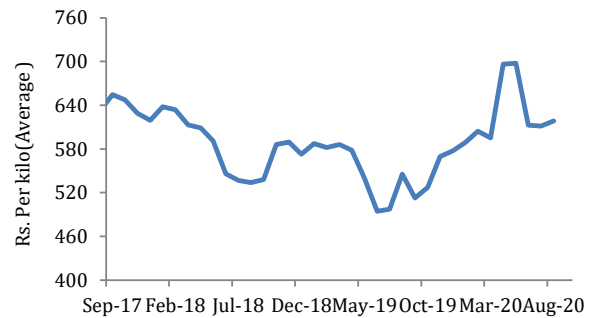
Source: Central Bank

6 Month T-Bill Yield



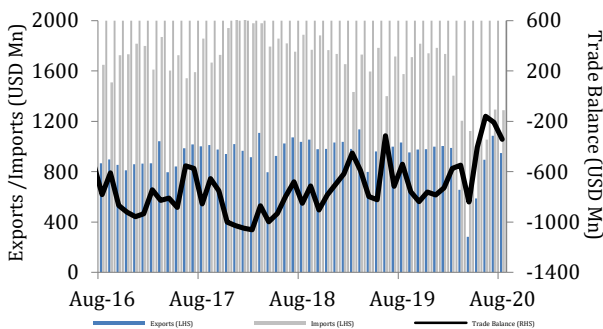
Source: Central Bank

Tea Prices



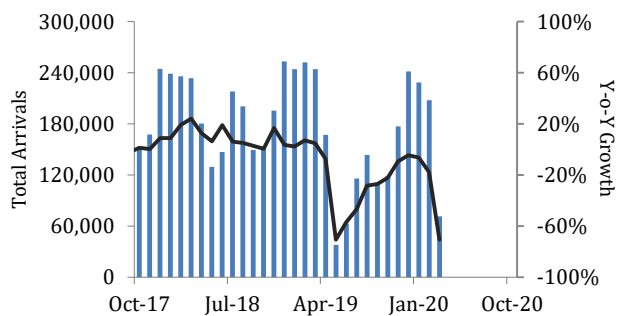
Source: Sri Lanka Tea Board

Export & Trade Balance



Source: Central Bank

Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

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