

ASPI ^v 4.53% | S&P SL20 ^v 5.97%

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KEY STATISTICS

Week ending	05-Feb	29-Jan	+/-
ASPI	8,275.37	8,668.07	-4.53%
S&P SL20	3,304.30	3,514.18	-5.97%
Banks	691.16	742.08	-6.86%
Capital Goods	1,323.09	1,435.97	-7.86%
Food, Beverage & Tobacco	1,056.51	1,092.17	-3.27%
Consumer Durables & Apparel	1,267.72	1,311.01	-3.30%
Materials	1,868.45	1,868.57	-0.01%
Diversified Financials	1,577.31	1,700.08	-7.22%
Turnover (LKR Bn)	42.08	54.26	-22.45%
Foreign Buying (LKR Mn)	455.02	987.36	-53.92%
Foreign Selling (LKR Mn)	1,936.21	5,561.67	-65.19%
Daily Average Turnover (LKR Bn)	10.52	13.56	-22.45%
Daily Average Foreign Buying (LKR Mn)	113.76	246.84	-53.92%
Daily Average Foreign Selling (LKR Mn)	484.05	1,390.42	-65.19%

TOP 10 GAINERS

Company	Code	Opening Price	Closing Price	WoW % Change
HUNTERS	HUNTN	600.5	763.3	27.1%
SERENDIB LAND	SLNDN	1812.5	2265.5	25.0%
CONVENIENCE FOOD	SOY N	1269.3	1547.3	21.9%
PARAGON	PARAN	57.8	68.9	19.2%
MAHAWELI REACH	MRH N	14.0	15.7	12.1%
TALAWAKELLE	TPL N	89.7	97.9	9.1%
ORIENT FINANCE	ORINN	15.5	16.8	8.4%
AGALAWATTE	AGALN	27.3	29.4	7.7%
EXPOLANKA	EXPON	50.5	54.3	7.5%
ABANS	ABANN	181.8	193.0	6.2%

TOP 10 LOSERS

Company	Code	Opening Price	Closing Price	WoW % Change
S M B LEASING[NV]	SEMBX	0.6	0.4	-33.3%
BLUE DIAMONDS[NV]	BLUEX	0.4	0.3	-25.0%
YORK ARCADE	YORKN	248.3	188.5	-24.1%
S M B LEASING	SEMBN	1.3	1.0	-23.1%
LOLC DEV FINANCE	NIFLN	121.8	95.6	-21.5%
OFFICE EQUIPMENT	OFEQN	86.9	70.1	-19.3%
STANDARD CAPITAL	SINGN	85.6	70.1	-18.1%
VALLIBEL FINANCE	VFINN	159.5	133.5	-16.3%
GESTETNER	GESTN	120.5	101.5	-15.8%
INDUSTRIAL ASPH.	ASPHNN	0.7	0.6	-14.3%

Market Review

Indices |

The Bourse ended the week on a negative note this week with ASPI decreasing by 392.70 points (or 4.53%) to close at 8,275.37 points, while the S&P SL20 Index also decreased by 209.88 points (or 5.97%) to close at 3,304.30 points.

Turnover & Market Capitalization |

Browns Investments was the highest contributor to the week's turnover value, contributing LKR 18.23Bn or 43.33% of total turnover value. L O L C Holdings followed suit, accounting for 8.30% of turnover (value of LKR 3.49Bn) while Expo Lanka contributed LKR 2.47Bn to account for 5.86% of the week's turnover. Total turnover value amounted to LKR 42.08Bn (cf. last week's value of LKR 54.26Bn), while daily average turnover value amounted to LKR 10.52Bn (-3.06% W-o-W) compared to last week's average of LKR 10.85Bn. Market capitalization meanwhile, decreased by 4.53% W-o-W (or LKR 171.53Bn) to LKR 3,617.62Bn cf. LKR 3,789.15Bn last week.

Liquidity (Value & Volume) |

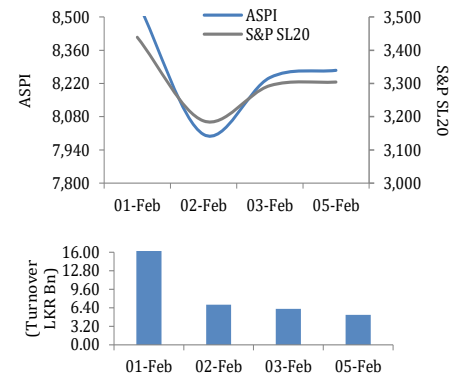
The Food beverage & tobacco Industry Group was the highest contributor to the week's total turnover value, accounting for 45.89% (or LKR 19.31Bn) of market turnover. Industry Group's turnover was driven primarily by Browns Investments which accounted for 94.41% of the sector's total turnover. Capital goods Industry Group meanwhile accounted for 16.46% of the total turnover value while Diversified Financials Industry Group contributed 11.36% to the weekly turnover.

The Food, Beverage & Tobacco Industry Group dominated the market in terms of share volume, accounting for 84.31% (or 2860.85Mn shares) of total volume, with a value contribution of LKR 19.31Bn. The Materials Industry Group followed suit, adding 5.97% to total volume (202.67Mn shares) while Diversified Financials contributed 2.87% (97.24Mn shares) to the weekly share volume.

Net Foreign Position |

Foreign investors were net sellers this week with total net outflow amounting to LKR 1.48Bn relative to last week's total net outflow of LKR 4.57Bn (67.6% W-o-W). Total foreign purchases decreased by 53.9% W-o-W to LKR 0.46Bn from last week's value of LKR 0.99Bn, while total foreign sales amounted to LKR 1.94Bn relative to LKR 5.56Bn recorded last week (-65.2% W-o-W).

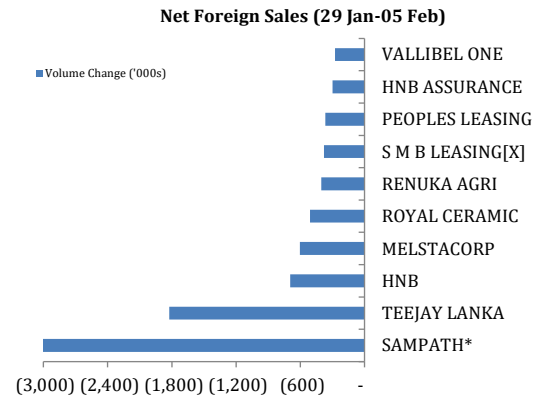
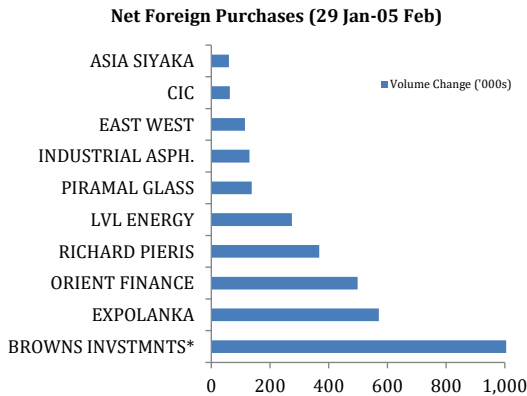
Indices vs. Turnover (01st Feb – 05th Feb)



TOP 10 TURNOVERS

Company	Code	Industry Group	Opening Price	Closing Price	Value (Rs. Mn)	Contribution to Total Turnover
BROWNS INVSTMNTS	BIL N	FOOD BEVERAGE AND TOBACCO	6.7	6.5	18,229.8	43.3%
L O L C HOLDINGS	LOLCN	DIVERSIFIED FINANCIALS	512.8	469.8	3,491.4	8.3%
EXPOLANKA	EXPON	TRANSPORTATION	50.5	54.3	2,467.6	5.9%
SAMPATH	SAMPN	BANKS	201.5	176.3	1,949.9	4.6%
VALLIBEL ONE	VONEN	CAPITAL GOODS	81.9	71.4	1,728.9	4.1%
ROYAL CERAMIC	RCL N	CAPITAL GOODS	398.5	349.0	1,663.1	4.0%
DIPPED PRODUCTS	DIPDN	MATERIALS	703.0	706.8	1,384.9	3.3%
JKH	JKH N	CAPITAL GOODS	167.0	155.3	1,159.3	2.8%
HAYLEYS	HAYLN	CAPITAL GOODS	772.0	781.8	928.6	2.2%
HAYCARB	HAYCN	MATERIALS	1196.0	1268.8	652.5	1.6%

Market Review (Cont'd)



*Volume change of Browns Investments (1.10Mn Shares) & Sampath (3.53Mn shares) from 29th Jan – 05th Feb not displayed.

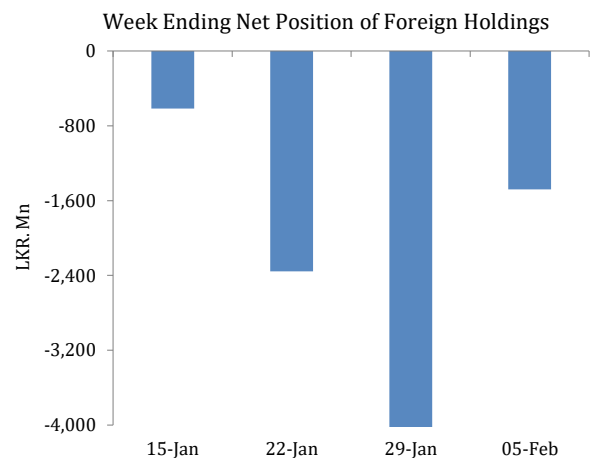
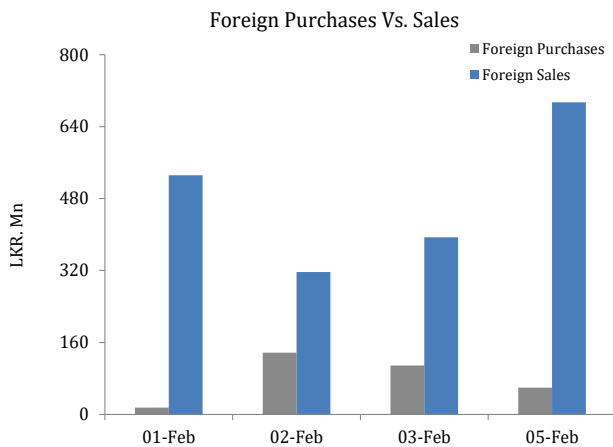
Net Foreign Purchases (By Transaction Value)

Net Foreign Sales (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	05/02/21	29/01/21		
EXPOLANKA	75.92%	75.89%	570,566	30.98
LB FINANCE	3.21%	3.17%	52,540	13.41
ORIENT FINANCE	0.38%	0.15%	498,455	8.37
BROWNS INVSTMNTS	0.28%	0.27%	1,095,100	7.12
SWISSTEK	1.96%	1.81%	41,419	5.82
RICHARD PIERIS	75.44%	75.43%	367,601	5.66
CIC	0.51%	0.49%	62,404	3.94
CENTRAL FINANCE	14.50%	14.49%	25,349	3.04
JOHN KEELLS	0.42%	0.36%	36,945	2.96
LVL ENERGY	1.16%	1.11%	274,324	2.80

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	05/02/21	29/01/21		
SAMPATH	12.37%	13.29%	(3,532,320)	(622.6)
ROYAL CERAMIC	1.30%	1.76%	(508,879)	(177.6)
HNB	22.01%	22.18%	(695,012)	(103.0)
TEEJAY LANKA	45.55%	45.80%	(1,823,698)	(75.1)
HAYCARB	4.32%	4.51%	(57,000)	(72.3)
MELSTACORP	22.17%	22.22%	(604,441)	(37.4)
LANKA TILES	0.92%	1.16%	(128,592)	(32.4)
CEYLON TOBACCO	96.95%	96.96%	(21,151)	(23.6)
HNB[X.0000]	25.04%	25.21%	(172,350)	(20.1)
VALLIBEL ONE	0.51%	0.53%	(277,350)	(19.8)

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>
LANKA CERAMIC PLC	1.30	First interim	11/02/2021
KEELLS FOOD PRODUCTS PLC	7.00	First interim	12/02/2021
CEYLON COLD STORES PLC	8.50	First interim	15/02/2021
SUNSHINE HOLDINGS PLC	1.00	First interim	16/02/2021
THREE ACRE FARMS PLC	11.00	Second interim	16/02/2021
CEYLON GRAIN ELEVATORS PLC	9.00	Second interim	16/02/2021
PANASIA POWER PLC	0.12	Interim	16/02/2021
VALLIBEL POWER ERATHNA PLC	0.30	Third interim	16/02/2021

Crossings for the Week

Crossings

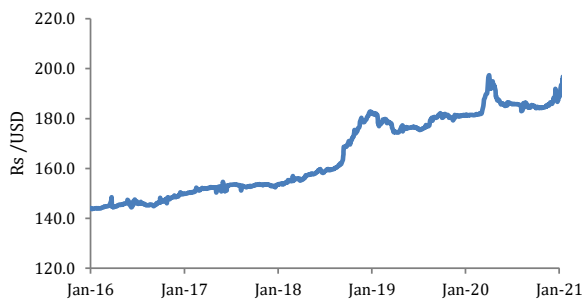
<u>Company</u>	<u>Quantity</u>	<u>Turnover(Rs. Mn)</u>	<u>% of Total Crossings</u>
BROWNS INVSTMNTS	2,634,352,470	16,859.86	97.7%
EXPOLANKA	1,500,000	78.00	0.5%
SOFTLOGIC	1,989,950	26.86	0.2%
SAMPATH	1,650,000	294.80	1.7%

Economic Snapshot

	Jun'20	Jul'20	Aug'20	Sep'20	Oct'20	Nov'20	Dec'20	Jan'21
Interest Rates								
Prime Lending Rate	8.78	7.79	7.01	6.42	6.10	5.95	5.74	5.82
Ave. Wtd. Deposit Rates	7.38	7.16	6.44	6.44	6.23	6.01	5.80	5.58
Ave. Wtd. Fixed Dep. Rates	9.00	8.69	8.26	7.90	7.59	7.37	7.14	6.88
CCPI Inflation Y-o-Y % (Base 2013)	3.9	4.2	4.1	4.0	4.0	4.1	4.2	3.0
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%	

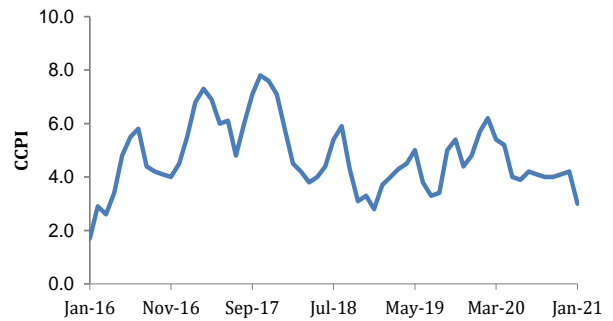
Source Central Bank

Exchange Rate, Rs. vs. US\$



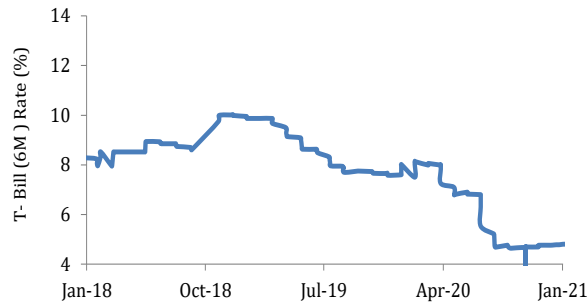
Source: Central Bank

Inflation (CCPI-N) YoY%



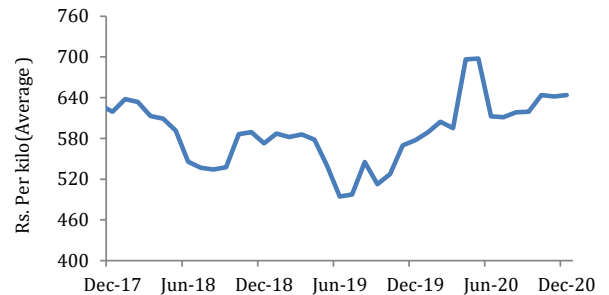
Source: Central Bank

6 Month T-Bill Yield



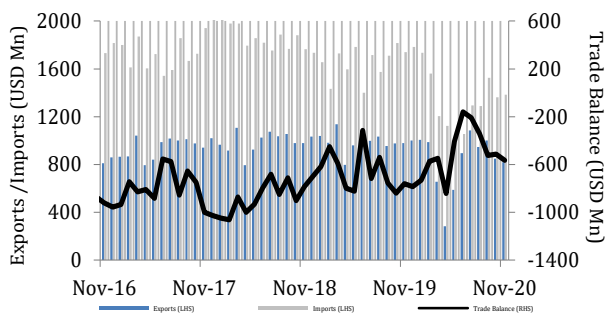
Source: Central Bank

Tea Prices



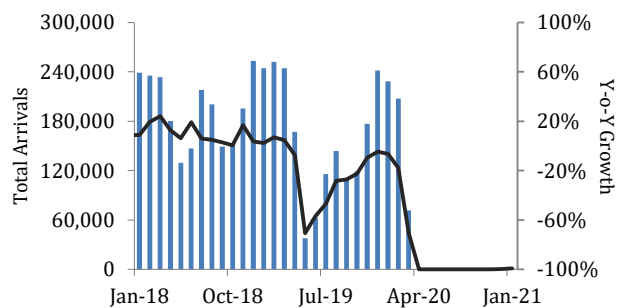
Source: Sri Lanka Tea Board

Export & Trade Balance



Source: Central Bank

Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

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