

## ASPI <sup>v</sup> 3.51% | S&P SL20 <sup>v</sup> 3.75%

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### KEY STATISTICS

Week ending	12-Feb	05-Feb	+/-
ASPI	7,985.00	8,275.37	-3.51%
S&P SL20	3,180.24	3,304.30	-3.75%
Banks	665.27	691.16	-3.75%
Capital Goods	1,276.44	1,323.09	-3.53%
Food, Beverage & Tobacco	1,030.74	1,056.51	-2.44%
Consumer Durables & Apparel	1,209.58	1,267.72	-4.59%
Materials	1,765.19	1,868.45	-5.53%
Diversified Financials	1,494.77	1,577.31	-5.23%
Turnover (LKR Bn)	24.42	42.08	-41.96%
Foreign Buying (LKR Mn)	1,396.04	455.02	206.81%
Foreign Selling (LKR Mn)	2,705.53	1,936.21	39.73%
Daily Average Turnover (LKR Bn)	4.88	10.52	-53.57%
Daily Average Foreign Buying (LKR Mn)	279.21	113.76	145.45%
Daily Average Foreign Selling (LKR Mn)	541.11	484.05	11.79%

### TOP 10 GAINERS

Company	Code	Opening Price	Closing Price	WoW % Change
SERENDIB LAND	SLNDN	2265.5	2805.0	23.8%
AMANA LIFE	ATLLN	8.7	10.6	21.8%
STANDARD CAPITAL	SINGN	70.1	81.3	16.0%
LMF	LMF N	165.0	185.8	12.6%
GRAIN ELEVATORS	GRANN	146.0	159.0	8.9%
PALM GARDEN HOTL	PALMN	29.5	32.1	8.8%
LOLC FINANCE	LOFCN	7.1	7.5	5.6%
COLOMBO CITY	PHARN	1000.3	1034.0	3.4%
DILMAH CEYLON	CTEAN	654.0	675.0	3.2%
KOTMALE HOLDINGS	LAMBN	236.0	243.5	3.2%

### TOP 10 LOSERS

Company	Code	Opening Price	Closing Price	WoW % Change
E B CREASY	EBCRN	5613.8	46.5	-99.2%
LANKA ALUMINIUM	LALUN	137.8	23.4	-83.0%
S M B LEASING	SEMBN	1.0	0.7	-30.0%
CIT	CITN	182.3	142.3	-21.9%
KELANI CABLES	KCABN	153.3	124.3	-18.9%
SINGHE HOSPITALS	SINH	2.8	2.3	-17.9%
AMANA TAKAFUL	ATL N	9.7	8.0	-17.5%
TESS AGRO[NV]	TESSX	0.6	0.5	-16.7%
HOTEL SIGIRIYA	HSIGN	64.9	54.1	-16.6%
CONVENIENCE FOOD	SOY N	1547.3	1305.8	-15.6%

## Market Review

### Indices |

The Bourse ended the week on a negative note this week with ASPI decreasing by 290.37 points (or 3.51%) to close at 7,985 points, while the S&P SL20 Index also decreased by 124.06 points (or 3.75%) to close at 3,180.24 points.

### Turnover & Market Capitalization |

Expo Lanka was the highest contributor to the week's turnover value, contributing LKR 2.23Bn or 9.12% of total turnover value. L O L C Holdings followed suit, accounting for 8.20% of turnover (value of LKR 2Bn) while Haycarb contributed LKR 1.70Bn to account for 6.98% of the week's turnover. Total turnover value amounted to LKR 24.42Bn (cf. last week's value of LKR 42.08Bn), while daily average turnover value amounted to LKR 4.88Bn (-41.96%W-o-W) compared to last week's average of LKR 8.42Bn. Market capitalization meanwhile, decreased by 3.49% W-o-W (or LKR 126.35Bn) to LKR 3,491.27Bn cf. LKR 3,617.62Bn last week.

### Liquidity (Value & Volume) |

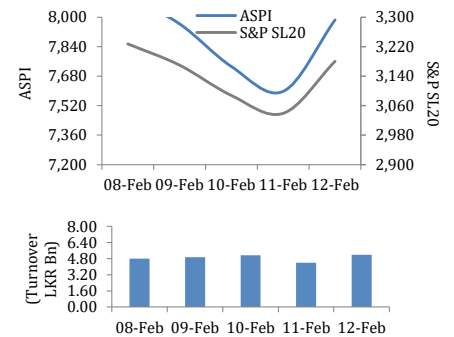
The Capital goods Industry Group was the highest contributor to the week's total turnover value, accounting for 29.99% (or LKR 7.32Bn) of market turnover. Industry Group's turnover was driven primarily by Royal Ceramic, Vallibel One, JKH & Hemas Holdings which accounted for 72.96% of the sector's total turnover. Materials Industry Group meanwhile accounted for 19.64% of the total turnover value while Food, Beverage & Tobacco Industry Group contributed 16.20% to the weekly turnover.

The Food, Beverage & Tobacco Industry Group dominated the market in terms of share volume, accounting for 37.47% (or 309.27Mn shares) of total volume, with a value contribution of LKR 3.96Bn. The Materials Industry Group followed suit, adding 18.62% to total volume (153.70Mn shares) while Diversified Financials contributed 14.56% (120.21Mn shares) to the weekly share volume.

### Net Foreign Position |

Foreign investors were net sellers this week with total net outflow amounting to LKR 1.31Bn relative to last week's total net outflow of LKR 1.48Bn (11.6% W-o-W). Total foreign purchases increased by 206.8% W-o-W to LKR 1.40Bn from last week's value of LKR 0.46Bn, while total foreign sales amounted to LKR 2.71Bn relative to LKR 1.94Bn recorded last week (39.7% W-o-W).

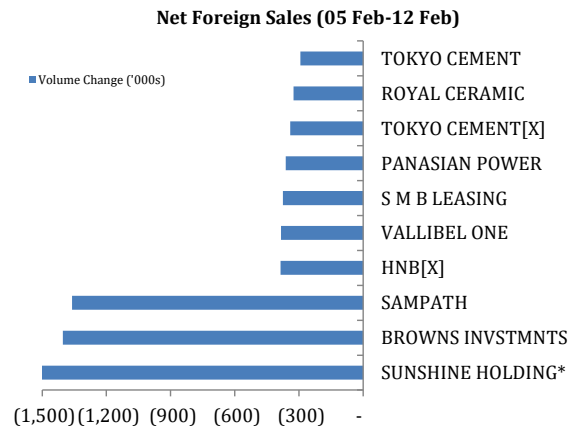
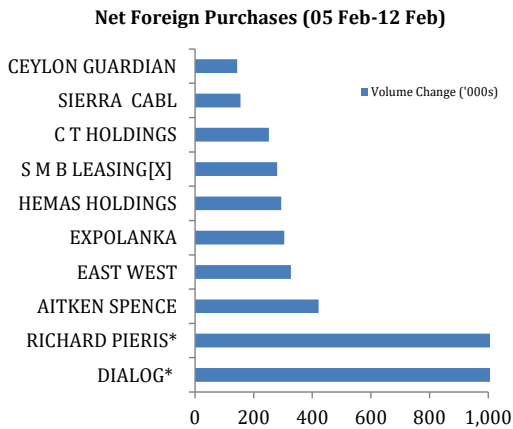
### Indices vs. Turnover (08<sup>th</sup> Feb – 12<sup>th</sup> Feb)



### TOP 10 TURNOVERS

Company	Code	Industry Group	Opening Price	Closing Price	Value (Rs. Mn)	Contribution to Total Turnover
EXPOLANKA	EXPON	TRANSPORTATION	54.3	51.8	2,226.1	9.1%
L O L C HOLDINGS	LOLCN	DIVERSIFIED FINANCIALS	469.8	430.8	2,001.6	8.2%
HAYCARB	HAYCN	MATERIALS	1268.8	1109.3	1,704.4	7.0%
BROWNS INVESTMENTS	BIL N	FOOD BEVERAGE AND TOBACCO	6.5	6.0	1,557.5	6.4%
ROYAL CERAMIC	RCL N	CAPITAL GOODS	349.0	333.5	1,540.6	6.3%
DIPPED PRODUCTS	DIPDN	MATERIALS	706.8	665.0	1,343.3	5.5%
VALLIBEL ONE	VONEN	CAPITAL GOODS	71.4	65.7	1,328.3	5.4%
JKH	JKH N	CAPITAL GOODS	155.3	154.3	1,252.1	5.1%
HEMAS HOLDINGS	HHL N	CAPITAL GOODS	92.3	89.0	1,223.3	5.0%
SUNSHINE HOLDING	SUN N	FOOD BEVERAGE AND TOBACCO	96.6	86.8	1,116.2	4.6%

Market Review (Cont'd)



\*Volume change of Dialog (2.72Mn Shares), Richard Pieris (1.65Mn shares) & Sunshine Holdings (12.0Mn shares) from 05<sup>th</sup> Feb – 12<sup>th</sup> Feb not displayed.

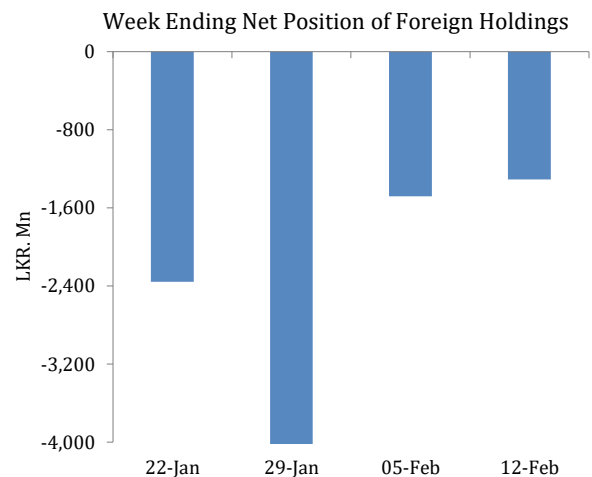
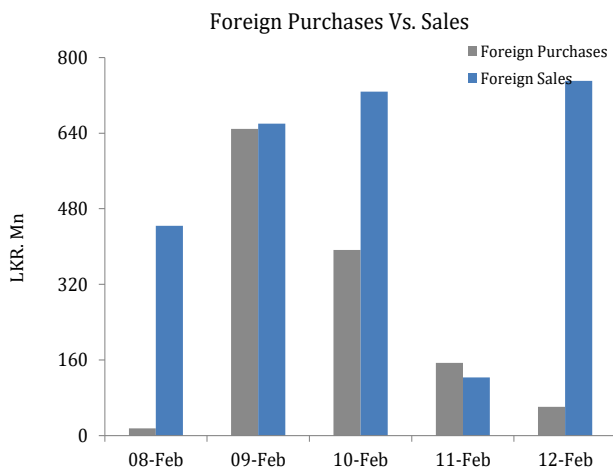
Net Foreign Purchases (By Transaction Value)

Net Foreign Sales (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	12/02/21	05/02/21		
C T HOLDINGS	11.41%	11.28%	251,936	43.21
DIALOG	91.82%	91.79%	2,721,088	33.20
AITKEN SPENCE	21.35%	21.24%	421,322	28.48
HEMAS HOLDINGS	20.20%	20.15%	293,528	26.12
RICHARD PIERIS	75.53%	75.44%	1,654,627	25.65
CEYLON GUARDIAN	8.61%	8.44%	144,046	18.80
EXPOLANKA	75.94%	75.92%	304,100	15.75
CIC[X.0000]	4.12%	4.00%	106,371	5.17
EAST WEST	38.29%	38.06%	326,920	3.82
DIPPED PRODUCTS	0.58%	0.57%	5,447	3.62

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	12/02/21	05/02/21		
SUNSHINE HOLDING	44.19%	52.22%	(11,998,424)	(1,041.5)
SAMPATH	12.01%	12.37%	(1,360,437)	(237.1)
ROYAL CERAMIC	1.00%	1.30%	(325,873)	(108.7)
HAYCARB	4.12%	4.32%	(57,520)	(63.8)
HNB[X.0000]	24.66%	25.04%	(385,861)	(42.4)
COLD STORES	10.16%	10.20%	(42,610)	(28.1)
VALLIBEL ONE	0.47%	0.51%	(384,600)	(25.3)
TOKYO CEMENT[X.0000]	18.67%	18.93%	(341,000)	(23.8)
TOKYO CEMENT	19.96%	20.07%	(294,000)	(22.6)
LMF	19.18%	19.48%	(118,944)	(22.1)

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>
PRINTCARE PLC	1.00	First interim	17/02/2021
TEEJAY LANKA PLC	1.65	First interim	23/02/2021
ROYAL CERAMICS LANKA PLC	11.00	Second interim	23/02/2021
LANKA WALLTILES PLC	10.00	Second interim	23/02/2021
SWISSTEK (CEYLON) PLC	4.10	Second interim	23/02/2021
LANKA TILES PLC	12.30	Second interim	23/02/2021

## Crossings for the Week

### Crossings

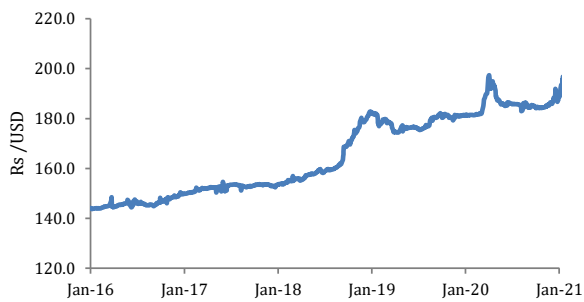
<u>Company</u>	<u>Quantity</u>	<u>Turnover(Rs. Mn)</u>	<u>% of Total Crossings</u>
SEYLAN BANK	400,000	20.00	3.4%
HEMAS HOLDINGS	1,000,000	90.00	15.3%
SUNSHINE HOLDING	6,000,000	480.00	81.4%

## Economic Snapshot

	Jun'20	Jul'20	Aug'20	Sep'20	Oct'20	Nov'20	Dec'20	Jan'21
<b>Interest Rates</b>								
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
<b>CCPI Inflation Y-o-Y % (Base 2013)</b>	<b>3.9</b>	<b>4.2</b>	<b>4.1</b>	<b>4.0</b>	<b>4.0</b>	<b>4.1</b>	<b>4.2</b>	<b>3.0</b>
<b>GDP Growth (Base 2010)</b>								
	2013	2014	2015	2016	2017	2018	2019	
	3.4%	5.0%	5.0%	4.5%	3.6%	3.3%	2.3%	

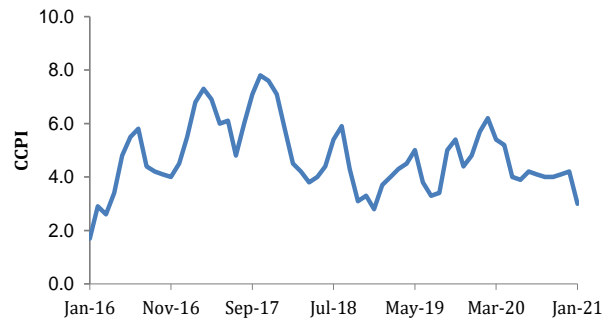
Source Central Bank

### Exchange Rate, Rs. vs. US\$



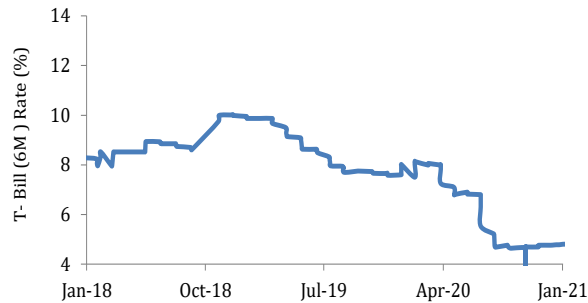
Source: Central Bank

### Inflation (CCPI-N) YoY%



Source: Central Bank

### 6 Month T-Bill Yield



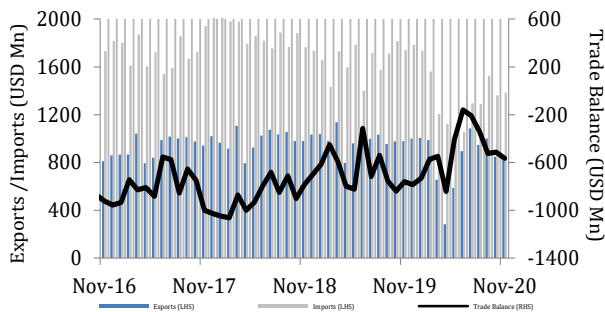
Source: Central Bank

### Tea Prices



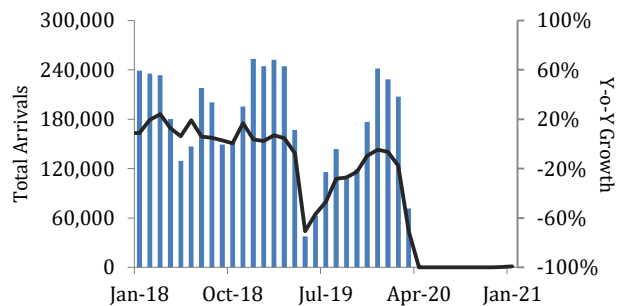
Source: Sri Lanka Tea Board

### Export & Trade Balance



Source: Central Bank

### Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

## Research Team

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**Nikita Tissera**

(+94) 112 206 256

[nikita@acuitystockbrokers.com](mailto:nikita@acuitystockbrokers.com)

**Dinekshi Senaratne**

(+94) 112 206 255

## Sales Team

---

**Prashan Fernando**

(+94) 112 206 222

[prashan@acuitystockbrokers.com](mailto:prashan@acuitystockbrokers.com)

**Kapila Pathirage**

(+94) 112 206 227/228

[kapila.p@acuitystockbrokers.com](mailto:kapila.p@acuitystockbrokers.com)

**Naren Godamunne**

(+94) 112 206 225

[naren@acuitystockbrokers.com](mailto:naren@acuitystockbrokers.com)

**Dhammika Wanniarachchi**

(+94) 112 206 229

[dhammika.w@acuitystockbrokers.com](mailto:dhammika.w@acuitystockbrokers.com)

**Kumar Dias Desinghe**

(+94) 814 474 443

[hnbkandy@sltnet.lk](mailto:hnbkandy@sltnet.lk)

**Susil Fernando**

(+94) 112 206 234

[susil@acuitystockbrokers.com](mailto:susil@acuitystockbrokers.com)

**Auburn Senn**

(+94) 112 206 239

[auburn@acuitystockbrokers.com](mailto:auburn@acuitystockbrokers.com)

**S. Vasanthakumar**

(+94) 112 206 250/251

[vasantha.k@acuitystockbrokers.com](mailto:vasantha.k@acuitystockbrokers.com)

**Prasanna Semasinghe**

(+94) 814 474 443

[hnbkandy@sltnet.lk](mailto:hnbkandy@sltnet.lk)

**Warana Sumanasena**

(+94) 112206 231

[warana@acuitystockbrokers.com](mailto:warana@acuitystockbrokers.com)

**Dinuk Subasinghe**

(+94) 112206 237

[dinuk@acuitystockbrokers.com](mailto:dinuk@acuitystockbrokers.com)

**Danuksha Koralage**

(+94) 112206 233

[danuksha@acuitystockbrokers.com](mailto:danuksha@acuitystockbrokers.com)

**Buddhenia Narangoda**

(+94) 112206 248

[buddhenia@acuitystockbrokers.com](mailto:buddhenia@acuitystockbrokers.com)

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