

ASPI ^ 8.64% | S&P SL20 ^7.32%Key statistics... **P1**The Bourse ended the week... **Cont. P2**Weekly foreign movement... **Cont. P3**Economic Snapshot..... **P6****KEY STATISTICS**

Week ending	15-Jan	08-Jan	+/-
ASPI	7,734.57	7,119.53	8.64%
S&P SL20	2,902.98	2,704.87	7.32%
Banks	616.22	603.96	2.03%
Capital Goods	1,170.78	1,067.50	9.67%
Food, Beverage & Tobacco	1,092.34	1,046.34	4.40%
Consumer Durables & Apparel	1,252.60	1,208.14	3.68%
Materials	1,598.62	1,378.01	16.01%
Diversified Financials	1,201.72	954.50	25.90%
Turnover (LKR Bn)	37.87	33.62	12.62%
Foreign Buying (LKR Mn)	847.61	563.62	50.39%
Foreign Selling (LKR Mn)	1,462.58	1,528.28	-4.30%
Daily Average Turnover (LKR Bn)	9.47	6.72	40.78%
Daily Average Foreign Buying (LKR Mn)	211.90	112.72	87.98%
Daily Average Foreign Selling (LKR Mn)	365.65	305.66	19.63%

TOP 10 GAINERS

Company	Code	Opening Price	Closing Price	WoW % Change
COMM LEASE & FIN	CLC N	4.5	8.7	93.3%
LOLC FINANCE	LOFCN	4.9	8.1	65.3%
LOLC DEV FINANCE	NIFLN	54.0	85.0	57.4%
EXPOLANKA	EXPON	34.3	53.4	55.7%
L O L C HOLDINGS	LOLCN	155.0	226.8	46.3%
FORT LAND	CFLBN	13.5	19.1	41.5%
LANKA ALUMINIUM	LALUN	114.0	161.0	41.2%
ACL	ACL N	84.7	119.5	41.1%
E B CREAMY	EBCRN	3136.0	4377.8	39.6%
RENUKA HOLDINGS[NV]	RHL X	11.0	15.3	39.1%

TOP 10 LOSERS

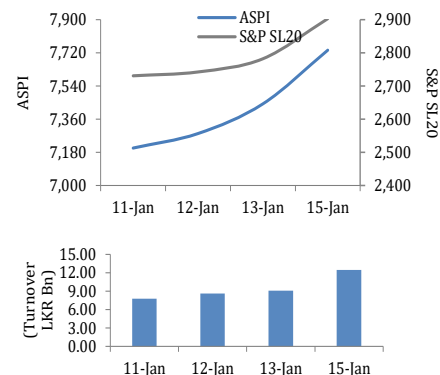
Company	Code	Opening Price	Closing Price	WoW % Change
CIC[NV]	CIC X	155.6	56.4	-63.8%
CIC	CIC N	185.3	70.5	-62.0%
BLUE DIAMONDS[NV]	BLUEX	0.4	0.3	-25.0%
MERC. SHIPPING	MSL N	111.5	88.5	-20.6%
CONVENIENCE FOOD	SOY N	1197.7	950.8	-20.6%
STANDARD CAPITAL	SINGN	99.3	84.5	-14.9%
KELSEY	KDL N	42.9	37.6	-12.4%
KAHAWATTE	KAHAN	34.3	30.6	-10.8%
NATION LANKA	CSF N	1.0	0.9	-10.0%
DURDANS	CHL N	115.5	104.8	-9.3%

Market Review

Indices |

The Bourse ended the week on a positive note this week with ASPI increasing by 615.04 points (or 8.64%) to close at 7,734.57 points, while the S&P SL20 Index also increased by 198.11 points (or 7.32%) to close at 2,902.98 points.

Indices vs. Turnover (08th Jan – 15^h Jan)



Turnover & Market Capitalization |

Browns investments was the highest contributor to the week's turnover value, contributing LKR 7.33Bn or 19.36% of total turnover value. Expo Lanka followed suit, accounting for 16.06% of turnover (value of LKR 6.08Bn) while LOLC Holdings contributed LKR 2.24Bn to account for 5.91% of the week's turnover. Total turnover value amounted to LKR 37.87Bn (cf. last week's value of LKR 33.62Bn), while daily average turnover value amounted to LKR 9.47Bn (40.78% W-o-W) compared to last week's average of LKR 6.72Bn. Market capitalization meanwhile, increased by 8.64% W-o-W (or LKR 268.88Bn) to LKR 3,381.08Bn cf. LKR 3,112.20Bn last week.

Liquidity (Value & Volume) |

The Food Beverage and Tobacco Industry Group was the highest contributor to the week's total turnover value, accounting for 24.11% (or LKR 9.13Bn) of market turnover. Industry Group's turnover was driven primarily by Browns investments which accounted for 80.31% of the sector's total turnover. Capital goods Industry Group meanwhile accounted for 19.06% of the total turnover value while Materials Industry Group contributed 16.50% to the weekly turnover.

The Food, Beverage & Tobacco Industry Group dominated the market in terms of share volume, accounting for 56.07% (or 1056.26Mn shares) of total volume, with a value contribution of LKR 9.13Bn. The Materials Industry Group followed suit, adding 9.36% to total volume (176.37Mn shares) while Capital goods contributed 7.76% (146.15Mn shares) to the weekly share volume.

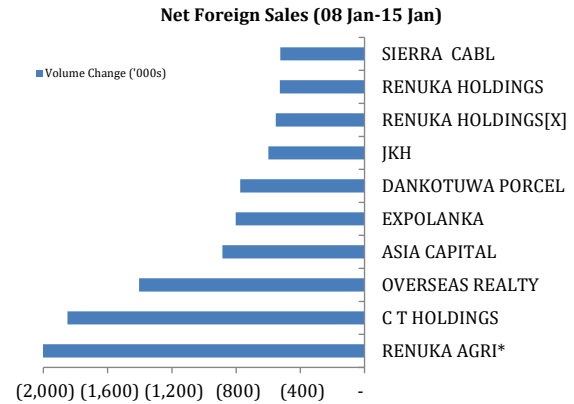
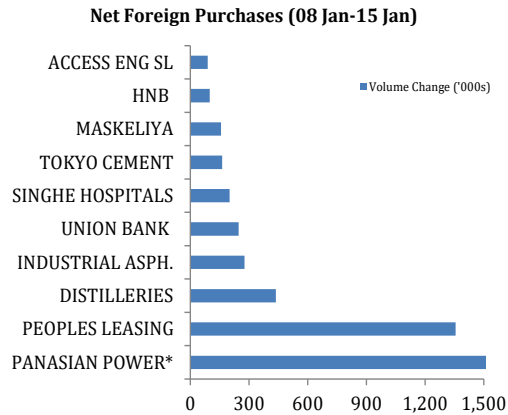
Net Foreign Position |

Foreign investors were net sellers this week with total net outflow amounting to LKR 0.61Bn relative to last week's total net outflow of LKR 0.965Bn (36.3% W-o-W). Total foreign purchases increased by 50.4% W-o-W to LKR 0.85Bn from last week's value of LKR 0.56Bn, while total foreign sales amounted to LKR 1.46Bn relative to LKR 1.53Bn recorded last week (-4.3% W-o-W).

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	6.5	7.5	7,332.4	19.4%
EXPOLANKA	EXPON	TRANSPORTATION	34.3	53.4	6,080.9	16.1%
L O L C HOLDINGS	LOLCN	DIVERSIFIED FINANCIALS	155.0	226.8	2,238.1	5.9%
DIPPED PRODUCTS	DIPDN	MATERIALS	340.0	401.3	1,600.7	4.2%
HAYLEYS	HAYLN	CAPITAL GOODS	416.8	491.3	1,228.1	3.2%
VALLIBEL ONE	VONEN	CAPITAL GOODS	34.8	41.1	1,005.6	2.7%
CIC[NV]	CIC X	MATERIALS	155.6	56.4	873.3	2.3%
CIC	CIC N	MATERIALS	185.3	70.5	868.3	2.3%
TOKYO CEMENT[NV]	TKYOX	MATERIALS	69.7	74.6	836.3	2.2%
JKH	JKH N	CAPITAL GOODS	149.0	160.0	656.2	1.7%

Market Review (Cont'd)



*Volume change of PanAsia Power (2.1Mn Shares) & Renuka Agri (2.9Mn shares) from 08th Jan– 15th Jan not displayed.

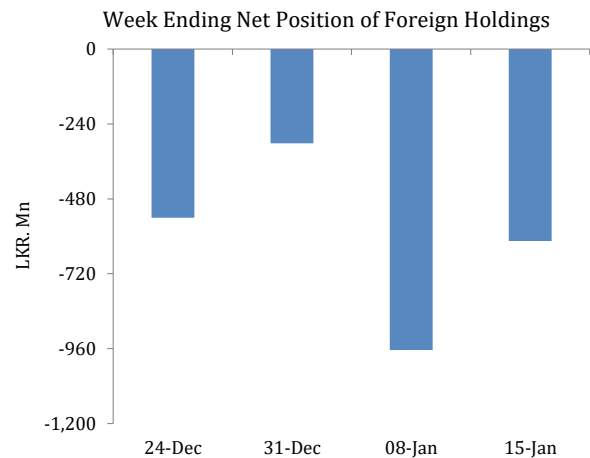
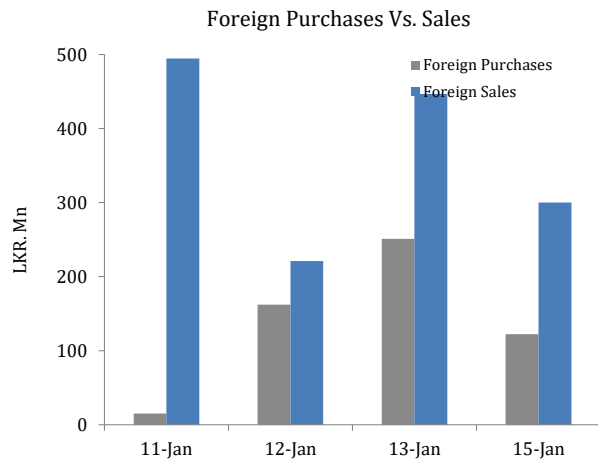
Net Foreign Purchases (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	15/01/21	08/01/21		
PEOPLES LEASING	4.52%	4.44%	1,355,738	18.03
KELANI CABLES	0.80%	0.43%	81,451	15.43
TOKYO CEMENT	20.01%	19.95%	162,738	13.56
HNB	23.24%	23.22%	99,058	12.70
ROYAL CERAMIC	1.92%	1.86%	62,076	12.59
DISTILLERIES	0.67%	0.67%	436,821	10.61
PANASIAN POWER	45.36%	45.02%	2,112,677	8.66
COLD STORES	10.26%	10.25%	10,350	7.20
MELSTACORP	22.38%	22.38%	62,941	3.95
UNION BANK	80.01%	79.99%	246,727	3.75

Net Foreign Sales (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	15/01/21	08/01/21		
CT HOLDINGS	11.97%	12.89%	(1,849,688)	(314.4)
JKH	38.52%	38.57%	(599,891)	(96.0)
EXPOLANKA	75.78%	75.82%	(803,331)	(42.9)
HAYCARB	4.63%	4.82%	(54,601)	(41.4)
HNB[X.0000]	32.92%	33.23%	(313,421)	(33.2)
DIPPED PRODUCTS	0.70%	0.80%	(61,246)	(24.6)
L O L C HOLDINGS	0.48%	0.50%	(93,522)	(21.2)
OVERSEAS REALTY	90.07%	90.18%	(1,404,027)	(19.8)
LANKA ALUMINIUM	50.84%	51.61%	(105,995)	(17.1)
CARGILLS	7.05%	7.08%	(74,047)	(16.7)

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.



Crossings for the Week

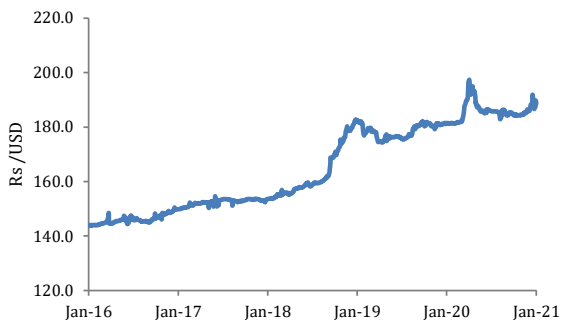
<u>Company</u>	<u>Quantity</u>	<u>Turnover(Rs. Mn)</u>	<u>% of Total Crossings</u>
ASIA CAPITAL	21,329,995	159.97	5.8%
FORT LAND	8,000,000	112.00	4.0%
DIPPED PRODUCTS	1,213,411	467.02	16.8%
DISTILLERIES	2,881,243	66.27	2.4%
EXPOLANKA	7,998,646	355.61	12.8%
HNB	500,000	64.50	2.3%
CARGILLS	1,400,000	315.00	11.3%
DIPPED PRODUCTS	1,213,411	467.02	16.8%
HAYLEYS	125,000	55.00	2.0%
JKH	1,726,469	272.25	9.8%
NAT. DEV. BANK	1,500,000	118.50	4.3%
ROYAL CERAMIC	105,000	20.79	0.7%
RENUKA HOLDINGS	3,000,000	51.00	1.8%
HEMAS HOLDINGS	600,000	57.00	2.1%
WATAWALA	500,000	29.00	1.0%
COMMERCIAL BANK	2,000,000	166.90	6.0%
AMAYA LEISURE	4,968,643	213.65	7.7%
SOFTLOGIC	2,000,000	27.00	1.0%
AITKEN SPENCE	700,000	43.40	1.6%
TOKYO CEMENT	1,500,000	108.00	3.9%

Economic Snapshot

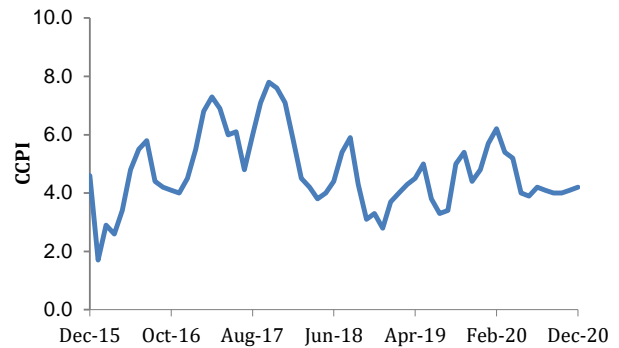
	May'20	Jun'20	Jul'20	Aug'20	Sep'20	Oct'20	Nov'20	Dec'20
Interest Rates								
Prime Lending Rate	9.28	8.78	7.79	7.01	6.42	6.10	5.95	5.74
Ave. Wtd. Deposit Rates	7.57	7.38	7.16	6.44	6.44	6.23	6.01	5.80
Ave. Wtd. Fixed Dep. Rates	9.26	9.00	8.69	8.26	7.90	7.59	7.37	7.14
CCPI Inflation Y-o-Y % (Base 2013)	4.0	3.9	4.2	4.1	4.0	4.0	4.1	4.2
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\$

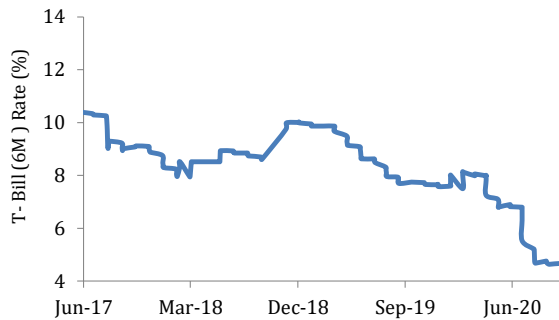


Inflation (CCPI-N) YoY%



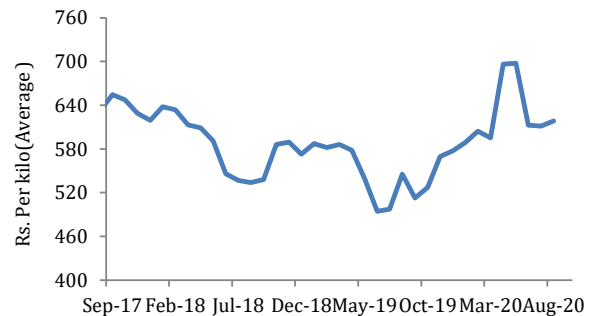
Source: Central Bank

6 Month T-Bill Yield



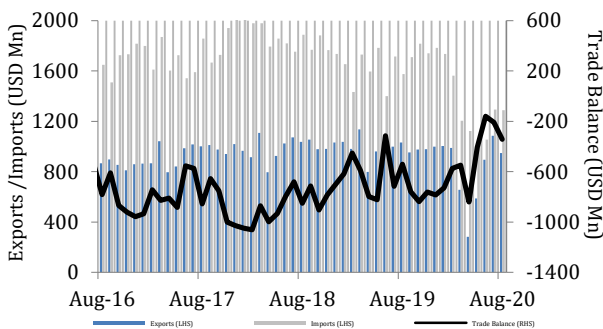
Source: Central Bank

Tea Prices



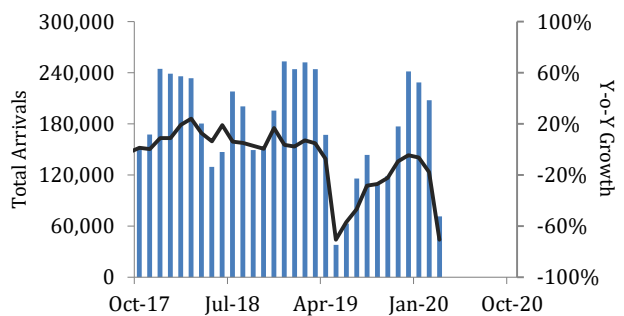
Source: Sri Lanka Tea Board

Export & Trade Balance



Source: Central Bank

Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

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