

ASPI ^v 2.34% | S&P SL20 ^v 2.58%

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KEY STATISTICS

Week ending	19-Feb	12-Feb	+/-
ASPI	7,797.94	7,985.00	-2.34%
S&P SL20	3,098.12	3,180.24	-2.58%
Banks	647.57	665.27	-2.66%
Capital Goods	1,273.70	1,276.44	-0.21%
Food, Beverage & Tobacco	999.46	1,030.74	-3.03%
Consumer Durables & Apparel	1,226.61	1,209.58	1.41%
Materials	1,727.98	1,765.19	-2.11%
Diversified Financials	1,439.07	1,494.77	-3.73%
Turnover (LKR Bn)	20.44	24.42	-16.31%
Foreign Buying (LKR Mn)	438.26	1,396.04	-68.61%
Foreign Selling (LKR Mn)	1,319.15	2,705.53	-51.24%
Daily Average Turnover (LKR Bn)	4.09	4.88	-16.31%
Daily Average Foreign Buying (LKR Mn)	87.65	279.21	-68.61%
Daily Average Foreign Selling (LKR Mn)	263.83	541.11	-51.24%

TOP 10 GAINERS

Company	Code	Opening Price	Closing Price	WoW % Change
KELSEY	KDL N	35.0	42.6	21.7%
AHOT PROPERTIES	AHPLN	37.5	45.4	21.1%
RICHARD PIERIS	RICHN	15.5	17.8	14.8%
FORTRESS RESORTS	RHTLN	10.6	11.6	9.4%
GESTETNER	GESTN	100.0	108.0	8.0%
BOGALA GRAPHITE	BOGAN	22.9	24.7	7.9%
TEEJAY LANKA	TJL N	40.8	44.0	7.8%
ABANS FINANCIAL	AFSLN	24.6	26.5	7.7%
SERENDIB LAND	SLNDN	2805.0	3000.0	7.0%
RAMBODA FALLS	RFL N	16.5	17.6	6.7%

TOP 10 LOSERS

Company	Code	Opening Price	Closing Price	WoW % Change
DIPPED PRODUCTS	DIPDN	665.0	60.1	-91.0%
HAYLEYS	HAYLN	680.5	70.1	-89.7%
HAYCARB	HAYCN	1109.3	116.0	-89.5%
HAYLEYS FIBRE	HEXPN	183.8	60.0	-67.3%
KELANI VALLEY	KVALN	88.8	41.1	-53.7%
TALAWAKELLE	TPL N	91.7	43.0	-53.1%
HAYLEYS FABRIC	MGT N	32.8	16.1	-50.9%
AMAYA LEISURE	CONNN	39.9	20.5	-48.6%
S M B LEASING[NV]	SEMBX	0.4	0.3	-25.0%
PARAGON	PARAN	70.4	53.0	-24.7%

Market Review

Indices |

The Bourse ended the week on a negative note this week with ASPI decreasing by 187.06 points (or 2.34%) to close at 7,797.94 points, while the S&P SL20 Index also decreased by 82.12 points (or 2.58%) to close at 3,098.12 points.

Turnover & Market Capitalization |

L O L C Holdings was the highest contributor to the week's turnover value, contributing LKR 2.95Bn or 14.42% of total turnover value. Browns Investments followed suit, accounting for 7.96% of turnover (value of LKR 1.63Bn) while Vallibel One contributed LKR 1.56Bn to account for 7.62% of the week's turnover. Total turnover value amounted to LKR 20.44Bn (cf. last week's value of LKR 24.42Bn), while daily average turnover value amounted to LKR 4.09Bn (-16.31%W-o-W) compared to last week's average of LKR 4.88Bn. Market capitalization meanwhile, decreased by 2.32% W-o-W (or LKR 80.96Bn) to LKR 3,410.31Bn cf. LKR 3,491.27Bn last week.

Liquidity (Value & Volume) |

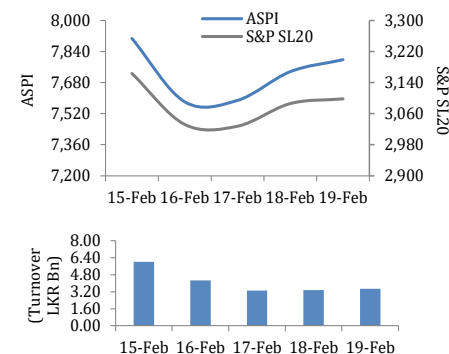
The Capital goods Industry Group was the highest contributor to the week's total turnover value, accounting for 34.67% (or LKR 7.09Bn) of market turnover. Industry Group's turnover was driven primarily by Vallibel One, Royal Ceramic, JKH & Hayleys which accounted for 73.17% of the sector's total turnover. Diversified Financials Industry Group meanwhile accounted for 15.96% of the total turnover value while Materials Industry Group contributed 14.40% to the weekly turnover.

The Food, Beverage & Tobacco Industry Group dominated the market in terms of share volume, accounting for 44.43% (or 306Mn shares) of total volume, with a value contribution of LKR 2.31Bn. The Materials Industry Group followed suit, adding 16.16% to total volume (111.27Mn shares) while Capital Goods contributed 13.41% (92.32Mn shares) to the weekly share volume.

Net Foreign Position |

Foreign investors were net sellers this week with total net outflow amounting to LKR 0.88Bn relative to last week's total net outflow of LKR 1.31Bn (32.7% W-o-W). Total foreign purchases decreased by 68.6% W-o-W to LKR 0.44Bn from last week's value of LKR 1.40Bn, while total foreign sales amounted to LKR 1.32Bn relative to LKR 2.71Bn recorded last week (-51.2% W-o-W).

Indices vs. Turnover (15th Feb – 19th Feb)

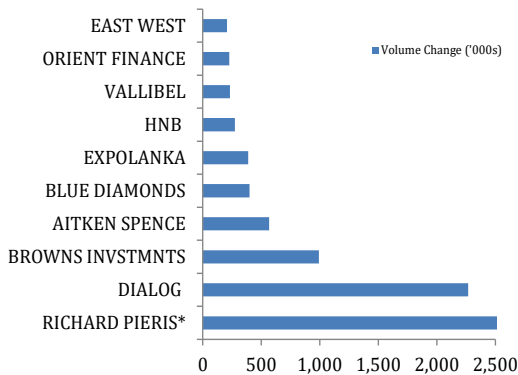


TOP 10 TURNOVERS

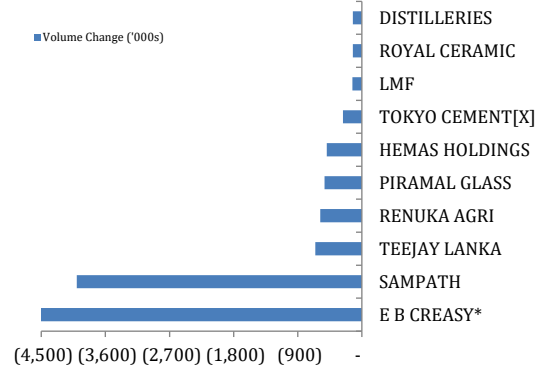
Company	Code	Industry Group	Opening Price	Closing Price	Value (Rs. Mn)	Contribution to Total Turnover
L O L C HOLDINGS	LOLCN	DIVERSIFIED FINANCIALS	430.8	407.3	2,948.0	14.4%
BROWNS INVSTMNTS	BIL N	FOOD BEVERAGE AND TOBACCO	6.0	6.1	1,625.8	8.0%
VALLIBEL ONE	VONEN	CAPITAL GOODS	65.7	62.0	1,556.6	7.6%
ROYAL CERAMIC	RCL N	CAPITAL GOODS	333.5	324.3	1,542.0	7.5%
JKH	JKH N	CAPITAL GOODS	154.3	160.0	1,445.3	7.1%
SAMPATH	SAMPN	BANKS	174.3	159.5	1,182.4	5.8%
EXPOLANKA	EXPON	TRANSPORTATION	51.8	47.1	1,095.9	5.4%
DIPPED PRODUCTS	DIPDN	MATERIALS	665.0	60.1	870.5	4.3%
HAYCARB	HAYCN	MATERIALS	1109.3	116.0	786.1	3.8%
HAYLEYS	HAYLN	CAPITAL GOODS	680.5	70.1	640.6	3.1%

Market Review (Cont'd)

Net Foreign Purchases (12 Feb-19 Feb)



Net Foreign Sales (12 Feb-19 Feb)



*Volume change of Richard Pieris (2.61Mn Shares) & E B Creasy (110.11Mn shares) from 12th Feb – 19th Feb not displayed.

Net Foreign Purchases (By Transaction Value)

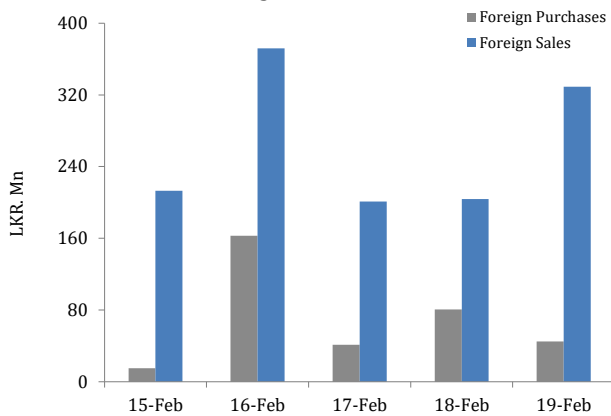
Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	19/02/21	12/02/21		
RICHARD PIERIS	75.65%	75.53%	2,605,628	46.38
HNB	22.07%	22.00%	275,150	37.90
AITKEN SPENCE	21.49%	21.35%	566,219	35.33
DIALOG	91.85%	91.82%	2,266,951	28.11
C T HOLDINGS	11.48%	11.41%	151,668	26.16
EXPOLANKA	75.96%	75.94%	388,000	18.27
BROWNS INVSTMNTS	0.28%	0.27%	992,000	6.05
CEYLON GUARDIAN	8.67%	8.61%	44,803	6.03
TOKYO CEMENT	19.99%	19.96%	77,236	5.72
ORIENT FINANCE	0.55%	0.45%	225,295	3.49

Net Foreign Sales (By Transaction Value)

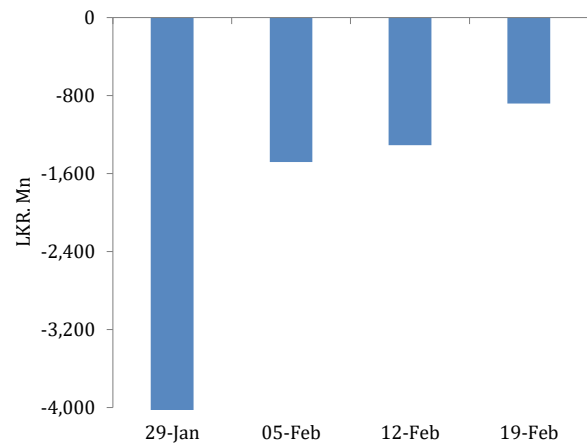
Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	19/02/21	12/02/21		
E B CREASY	0.44%	43.87%	(110,108,195)	(4,437.4)
SAMPATH	10.96%	12.01%	(4,000,291)	(638.0)
HEMAS HOLDINGS	20.12%	20.20%	(493,888)	(42.3)
ROYAL CERAMIC	0.89%	1.00%	(127,806)	(41.4)
TEEJAY LANKA	45.42%	45.51%	(655,292)	(28.8)
CEYLON TOBACCO	96.93%	96.94%	(23,833)	(25.5)
LMF	18.84%	19.18%	(133,817)	(22.6)
L O L C HOLDINGS	0.47%	0.48%	(47,805)	(19.5)
TOKYO CEMENT[X.0000]	18.47%	18.67%	(264,900)	(17.9)
COLD STORES	10.14%	10.16%	(19,915)	(13.2)

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.

Foreign Purchases Vs. Sales



Week Ending Net Position of Foreign Holdings



Announcements for the Week

Dividend Announcements

<u>Company</u>	<u>DPS(Rs.)</u>	<u>Dividend Type</u>	<u>Date(XD)</u>
SAMPATH BANK PLC (Scenario 1 : Sub-division not approved)	8.25	First and Final dividend	31/03/2021
SAMPATH BANK PLC (Scenario 2 : Sub-division approved)	2.75	First and Final dividend	31/03/2021
CEYLON TOBACCO COMPANY PLC	11.35	Final dividend	28/05/2021
NESTLE LANKA PLC	35.00	First interim	02/03/2021
NESTLE LANKA PLC	20.00	Final dividend	11/06/2021
NATIONAL DEVELOPMENT BANK PLC	1.50	First interim	02/03/2021
HNB ASSURANCE PLC	2.80	First and Final dividend	01/04/2021
HATTON NATIONAL BANK PLC (VOTING)	4.50	Final dividend	31/03/2021
HATTON NATIONAL BANK PLC (NON VOTING)	4.50	Final dividend	31/03/2021

<u>Company</u>	<u>Proportion</u>	<u>Dividend Type</u>	<u>No. of shares</u>
DFCC BANK PLC	1: 21.07	Scrip Dividend	14,525,186
HATTON NATIONAL BANK PLC (VOTING)	1 : 38.93	Scrip Dividend	10,540,320
HATTON NATIONAL BANK PLC (NON VOTING)	1 : 30.00	Scrip Dividend	3,388,537

Crossings for the Week

Crossings

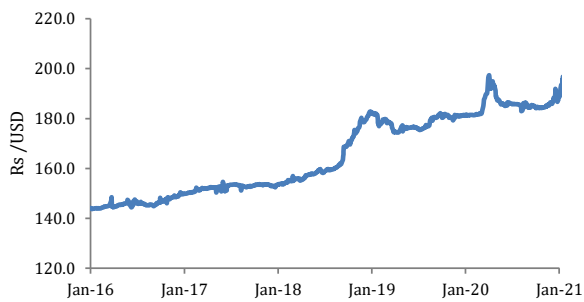
<u>Company</u>	<u>Quantity</u>	<u>Turnover(Rs. Mn)</u>	<u>% of Total Crossings</u>
DIALOG	4,889,384	60.63	7.8%
JKH	1,281,000	204.76	26.2%
SAMPATH	1,684,232	273.84	35.0%
HEMAS HOLDINGS	350,000	30.80	3.9%
SANASA DEV. BANK	850,000	51.00	6.5%
ASIRI SURG	7,500,015	120.00	15.3%
SEYLAN BANK	1,000,000	41.00	5.2%

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%	

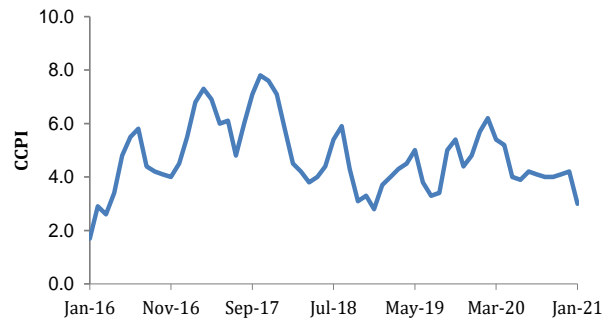
Source Central Bank

Exchange Rate, Rs. vs. US\$



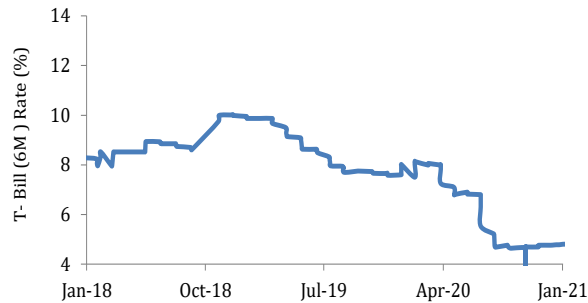
Source: Central Bank

Inflation (CCPI-N) YoY%



Source: Central Bank

6 Month T-Bill Yield



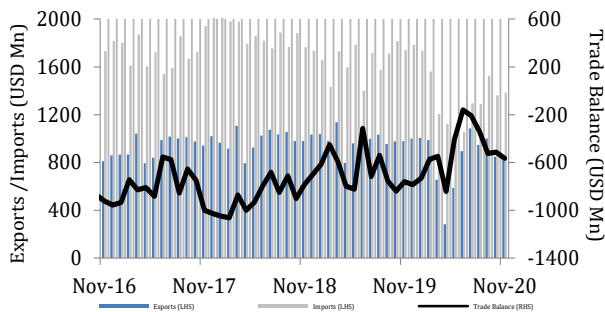
Source: Central Bank

Tea Prices



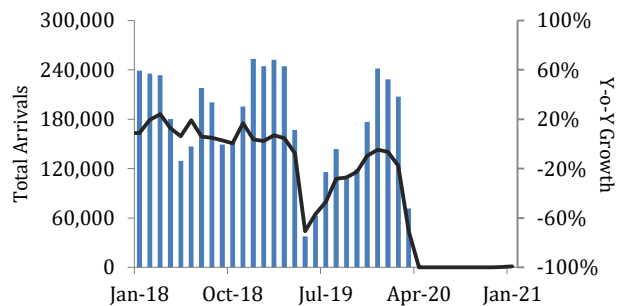
Source: Sri Lanka Tea Board

Export & Trade Balance



Source: Central Bank

Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

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