

ASPI ^ 2.42% | S&P SL20 ^6.09%

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KEY STATISTICS

Week ending	29-Jan	22-Jan	+/-
ASPI	8,668.07	8,463.43	2.42%
S&P SL20	3,514.18	3,312.35	6.09%
Banks	742.08	708.77	4.70%
Capital Goods	1,435.97	1,343.94	6.85%
Food, Beverage & Tobacco	1,092.17	1,126.34	-3.03%
Consumer Durables & Apparel	1,311.01	1,369.44	-4.27%
Materials	1,868.57	1,814.72	2.97%
Diversified Financials	1,700.08	1,490.39	14.07%
Turnover (LKR Bn)	54.26	60.02	-9.61%
Foreign Buying (LKR Mn)	987.36	1,069.09	-7.65%
Foreign Selling (LKR Mn)	5,561.67	3,426.62	62.31%
Daily Average Turnover (LKR Bn)	13.56	12.00	12.99%
Daily Average Foreign Buying (LKR Mn)	246.84	213.82	15.44%
Daily Average Foreign Selling (LKR Mn)	1,390.42	685.32	102.88%

TOP 10 GAINERS

Company	Code	Opening Price	Closing Price	WoW % Change
SM B LEASING	SEMBN	0.8	1.3	62.5%
VALLIBEL ONE	VONEN	54.6	81.9	50.0%
SM B LEASING[NV]	SEMBX	0.4	0.6	50.0%
LOLC HOLDINGS	LOLCN	351.3	512.8	46.0%
VALLIBEL FINANCE	VFINN	112.3	159.5	42.1%
ROYAL CERAMIC	RCLN	288.5	398.5	38.1%
BLUE DIAMONDS[NV]	BLUEX	0.3	0.4	33.3%
CIT	CITN	148.0	197.3	33.3%
LB FINANCE	LFINN	233.3	297.5	27.5%
DIPPED PRODUCTS	DIPDN	561.3	703.0	25.3%

TOP 10 LOSERS

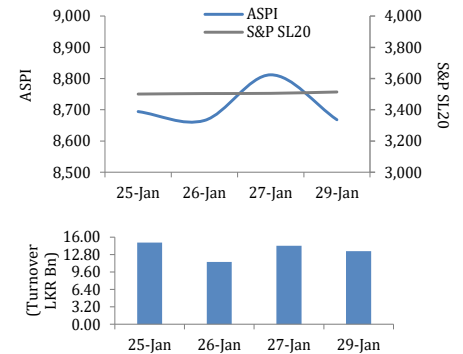
Company	Code	Opening Price	Closing Price	WoW % Change
HUNTERS	HUNTN	869.3	600.5	-30.9%
CONVENIENCE FOOD	SOYN	1719.0	1269.3	-26.2%
BUKIT DARAH	BUKIN	417.8	340.5	-18.5%
LOLC FINANCE	LOFCN	9.1	7.6	-16.5%
COMM LEASE & FIN	CLCN	9.1	7.7	-15.4%
SIERRA CABL	SIRAN	9.8	8.3	-15.3%
CIC	CICN	69.5	59.7	-14.1%
KELANI TYRES	TYREN	109.5	94.2	-14.0%
CIC[NV]	CICX	56.1	48.4	-13.7%
UNISYST	ALUFN	19.3	16.7	-13.5%

Market Review

Indices |

The Bourse ended the week on a positive note this week with ASPI increasing by 205 points (or 2.42%) to close at 8,668.07 points, while the S&P SL20 Index also increased by 202 points (or 6.09%) to close at 3,514.18 points.

Indices vs. Turnover (25th Jan – 29th Jan)



Turnover & Market Capitalization |

L O L C Holdings was the highest contributor to the week's turnover value, contributing LKR 8.07Bn or 14.88% of total turnover value. Expo Lanka followed suit, accounting for 10.91% of turnover (value of LKR 5.92Bn) while Sampath contributed LKR 3.56Bn to account for 6.56% of the week's turnover. Total turnover value amounted to LKR 54.26Bn (cf. last week's value of LKR 60.02Bn), while daily average turnover value amounted to LKR 13.56Bn (12.99% W-o-W) compared to last week's average of LKR 12Bn. Market capitalization meanwhile, increased by 2.42% W-o-W (or LKR 89.46Bn) to LKR 3,789.15Bn cf. LKR 3,699.69Bn last week.

Liquidity (Value & Volume) |

The Capital goods Industry Group was the highest contributor to the week's total turnover value, accounting for 25.73% (or LKR 13.96Bn) of market turnover. Industry Group's turnover was driven primarily by JKH, Hayleys, Royal ceramic & Vallibel One which accounted for 72.08% of the sector's total turnover. Diversified financials Industry Group meanwhile accounted for 19.77% of the total turnover value while Banks Industry Group contributed 15.28% to the weekly turnover.

The Materials Industry Group dominated the market in terms of share volume, accounting for 50.47% (or 1341.26Mn shares) of total volume, with a value contribution of LKR 7.72Bn. The Food, Beverage & Tobacco Industry Group followed suit, adding 13.35% to total volume (354.81Mn shares) while diversified financials Industry group contributed 13.27% (352.79Mn shares) to the weekly share volume.

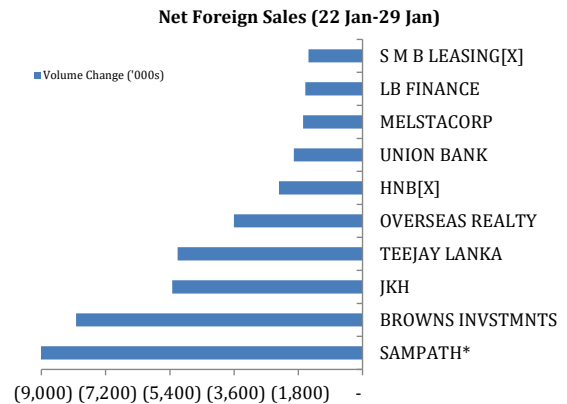
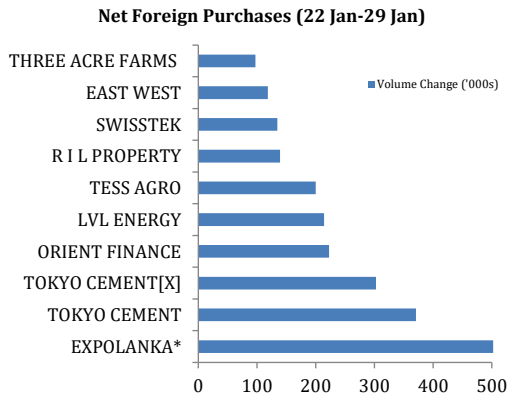
Net Foreign Position |

Foreign investors were net sellers this week with total net outflow amounting to LKR 4.57Bn relative to last week's total net outflow of LKR 2.36Bn (-94% W-o-W). Total foreign purchases decreased by 7.6% W-o-W to LKR 0.99Bn from last week's value of LKR 1.07Bn, while total foreign sales amounted to LKR 5.56Bn relative to LKR 3.43Bn recorded last week (62.3%W-o-W).

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	351.3	512.8	8,073.3	14.9%
EXPOLANKA	EXPON	TRANSPORTATION	55.1	50.5	5,916.7	10.9%
SAMPATH	SAMPN	BANKS	163.3	201.5	3,556.8	6.6%
JKH	JKH N	CAPITAL GOODS	168.3	167.0	3,270.1	6.0%
VALLIBEL ONE	VONEN	CAPITAL GOODS	54.6	81.9	2,780.8	5.1%
DIPPED PRODUCTS	DIPDN	MATERIALS	561.3	703.0	2,493.5	4.6%
ROYAL CERAMIC	RCL N	CAPITAL GOODS	288.5	398.5	2,468.9	4.6%
BROWNS INVSTMNTS	BIL N	FOOD BEVERAGE AND TOBACCO	6.9	6.7	2,192.4	4.0%
HAYLEYS	HAYLN	CAPITAL GOODS	752.0	772.0	1,543.8	2.8%
INDUSTRIAL ASPH.	ASPHNN	MATERIALS	0.8	0.7	1,353.8	2.5%

Market Review (Cont'd)



*Volume change of Expo Lanka (1.88Mn Shares) & Sampath (9.46Mn shares) from 22nd Jan – 29th Jan not displayed.

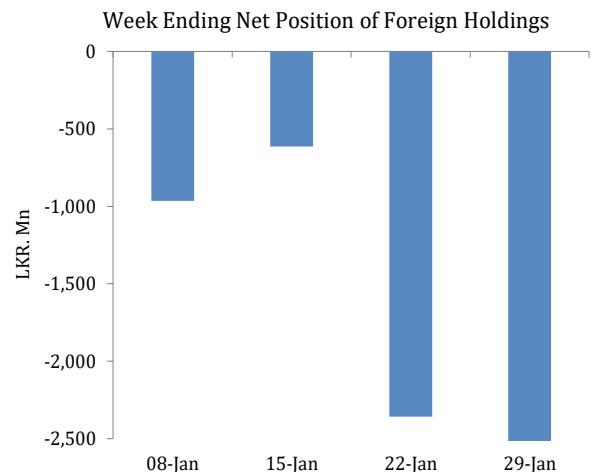
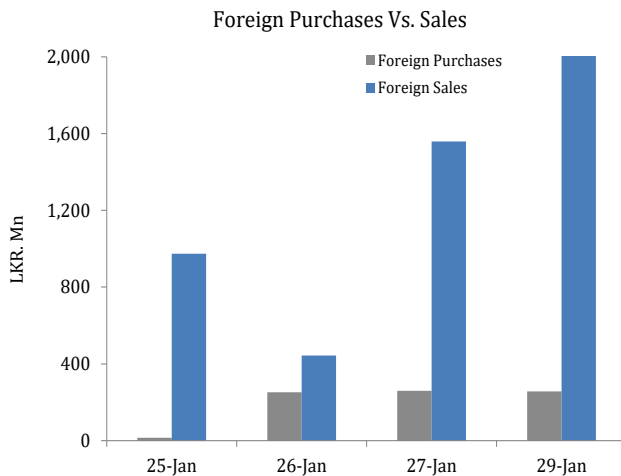
Net Foreign Purchases (By Transaction Value)

Net Foreign Sales (By Transaction Value)

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	29/01/21	22/01/21		
EXPOLANKA	75.89%	75.79%	1,884,770	95.18
TOKYO CEMENT	20.16%	20.02%	370,900	30.97
THREE ACRE FARMS	23.05%	22.64%	97,287	23.69
TOKYO CEMENT[X.0000]	18.98%	18.75%	302,700	22.49
SWISSTEK	1.81%	1.32%	134,617	20.73
ORIENT FINANCE	0.15%	0.04%	222,703	3.45
ELPITIYA	1.25%	1.16%	62,008	3.20
KELANI VALLEY	2.61%	2.52%	30,000	2.69
SANASA DEV. BANK	20.54%	20.50%	39,558	2.48
LVL ENERGY	1.11%	1.08%	214,000	2.14

Company	Foreign Holding (%)		Net Change	Value* (LKR. Mn)
	29/01/21	22/01/21		
SAMPATH	13.29%	15.77%	(9,457,769)	(1,905.7)
JKH	37.99%	38.40%	(5,336,596)	(891.2)
LB FINANCE	3.17%	4.33%	(1,605,842)	(477.7)
HNB[X.0000]	25.21%	27.52%	(2,344,769)	(283.7)
TEEJAY LANKA	45.80%	46.53%	(5,182,464)	(229.6)
MELSTACORP	22.22%	22.37%	(1,670,352)	(111.4)
HEMAS HOLDINGS	20.15%	20.32%	(992,956)	(95.9)
HNB	22.18%	22.30%	(481,929)	(75.1)
ROYAL CERAMIC	1.76%	1.92%	(185,777)	(74.0)
OVERSEAS REALTY	89.12%	89.41%	(3,608,216)	(68.2)

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.



Announcements for the Week

Dividend Announcements

<u>Company</u>	<u>DPS(Rs.)</u>	<u>Dividend Type</u>	<u>Date(XD)</u>
JOHN KEELLS HOLDINGS PLC	0.50	Third interim	09/02/2021
HATTON PLANTATIONS PLC	0.50	First interim	09/02/2021
B P P L HOLDINGS PLC	0.24	First interim	10/02/2021

Crossings for the Week

Crossings

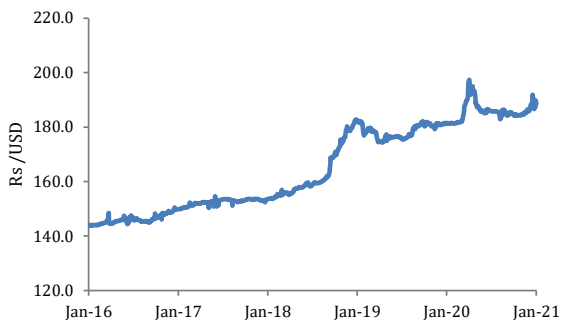
<u>Company</u>	<u>Quantity</u>	<u>Turnover(Rs. Mn)</u>	<u>% of Total Crossings</u>
COLD STORES	43,392	31.46	1.8%
COMMERCIAL BANK	2,584,476	259.09	15.0%
EXPOLANKA	1,785,584	108.05	6.2%
HAYLEYS	26,000	20.80	1.2%
HNB	1,975,921	262.25	15.2%
JKH	756,826	130.02	7.5%
LION BREWERY	45,000	26.55	1.5%
SAMPATH	160,811	26.53	1.5%
TEEJAY LANKA	4,755,238	213.80	12.4%
CIC	500,000	27.50	1.6%
C T HOLDINGS	495,000	94.05	5.4%
LB FINANCE	1,565,000	359.95	20.8%
NAT. DEV. BANK	250,000	25.00	1.4%
PAN ASIA	3,500,000	68.25	3.9%
SANASA DEV. BANK	850,000	55.68	3.2%
SOFTLOGIC	1,610,875	21.75	1.3%

Economic Snapshot

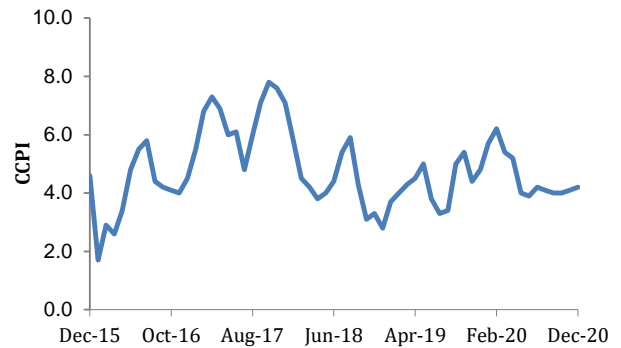
	May'20	Jun'20	Jul'20	Aug'20	Sep'20	Oct'20	Nov'20	Dec'20
Interest Rates								
Prime Lending Rate	9.28	8.78	7.79	7.01	6.42	6.10	5.95	5.74
Ave. Wtd. Deposit Rates	7.57	7.38	7.16	6.44	6.44	6.23	6.01	5.80
Ave. Wtd. Fixed Dep. Rates	9.26	9.00	8.69	8.26	7.90	7.59	7.37	7.14
CCPI Inflation Y-o-Y % (Base 2013)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

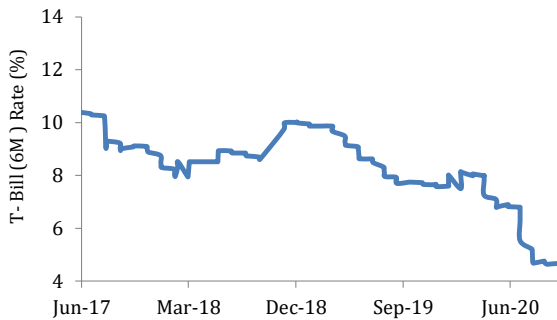


Inflation (CCPI-N) YoY%



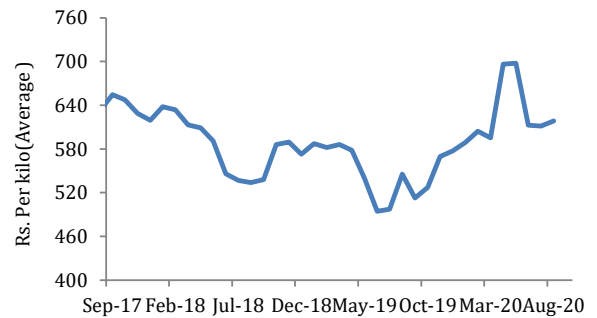
Source: Central Bank

6 Month T-Bill Yield



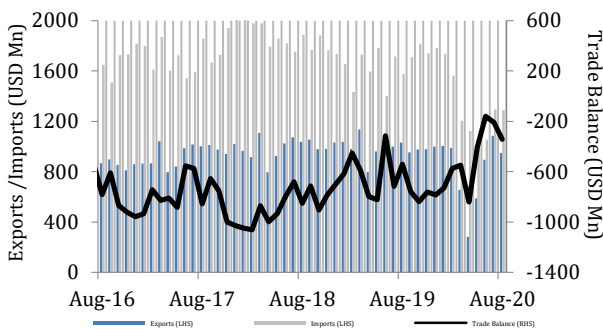
Source: Central Bank

Tea Prices



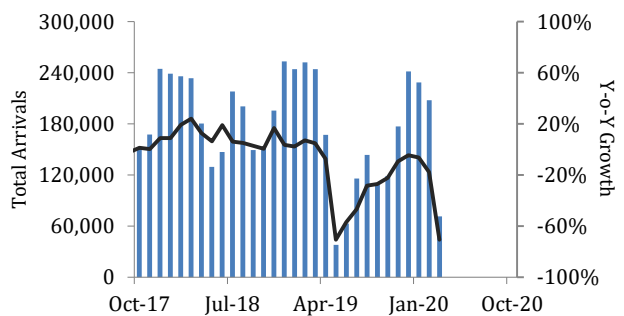
Source: Sri Lanka Tea Board

Export & Trade Balance



Source: Central Bank

Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

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