



DAILY MARKET REPORT

Colombo Stock Exchange - Day End Summary

Friday, July 24, 2026

Prepared by
Senfin Research

Daily Report

CSE Trade Summary

Market Ends the Day Negatively	Today	Previous	Chg	Chg (%)	YTD Chg	YTD (%)
CSE All Share Price Index (ASPI)	21,172.7	21,199.4	-26.63	(0.13)	(1,451.6)	(6.4)
S&P SL 20 Index	5,942.6	5,945.9	(3.3)	(0.1)	(214.8)	(3.5)
RSI	29.0	30.0				
Value of Turnover (LKR Mn)	2,450.0	1,078.0	1,372.0	127.3		
TRI on All Share (ASTRI)	33,266.6	33,306.2				
Foreign Purchases (LKR Mn)	1,184.6	124.8				
Foreign Sales (LKR Mn)	113.1	313.5				
Foreign Net Flow (LKR Mn)	1,071.5	(188.6)				
Volume of Turnover (No. in Mn)	93.6	37.7				
Market Capitalization (LKR Bn)	7,698.9	7,684.8				
Market Valuation						
PER (x)	11.2					
PBV (x)	1.3					
DY (%)	3.0					

Intra-Day Trading of ASPI

Exchange Date	Opening Index	Day's High	Day's High - Opening Index	Day's Low	Day's Low - Opening Index	Closing Index	Intra-Day Point Change	% Change
24-Jul-2026	21,199.37	21,262.50	63.13	21,127.79	-71.58	21,172.74	-26.63	-0.13%



Top Gainers and Top Losers

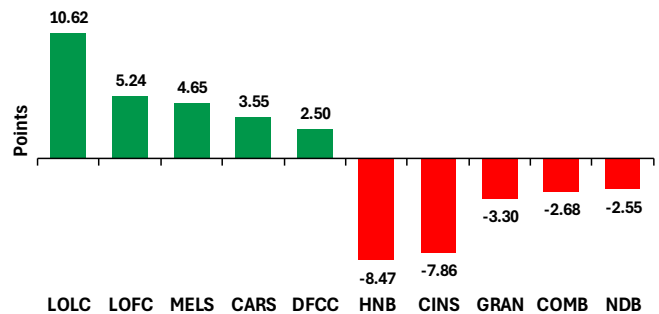
Top 5 Gainers	Price (LKR)	Chg (LKR)	Chg (%)	TTM EPS (LKR)	BVPS (LKR)	DPS (LKR)	PER (x)	PBV (x)	DY
LOFC	5.40	0.50	10.20%	0.91	5.26	-	5.93	1.03	-
RHTL	24.00	1.90	8.60%	1.36	19.79	-	17.65	1.21	-
AINS	28.00	2.00	7.69%	4.90	27.9	-	5.71	1.00	-
TESS	1.80	0.10	5.88%	0.05	0.45	-	36.00	4.00	-
CINV	104.50	4.80	4.81%	18.24	203.33	3.72	5.73	0.51	3.56%
Top 5 Losers	Price (LKR)	Chg (LKR)	Chg (%)	TTM EPS (LKR)	BVPS (LKR)	DPS (LKR)	PER (X)	PBV (X)	DY
SING	51.00	(3.90)	-7.10%	5.11	26.59	-	9.98	1.92	-
OFEQ	456.25	(28.25)	-5.83%	-25.10	17.22	-	-18.18	26.50	-
MSL	180.75	(9.50)	-4.99%	0.20	137.03	-	903.75	1.32	-
CHL(X)	47.50	(2.40)	-4.81%	5.68	70.94	1.10	8.36	0.67	2.32%
EAST	57.00	(2.80)	-4.68%	4.26	23.81	-	13.37	2.39	-

Top Crossings

Stock	Qty	Price	Turnover(LKR)
UML	38,000,000	27.00	1,026,000,000
HNB	452,000	385.00	174,020,000
COMB	554,222	201.00	111,398,622
AAIC	1,150,000	80.00	92,000,000
HNB(X)	200,000	317.00	63,400,000

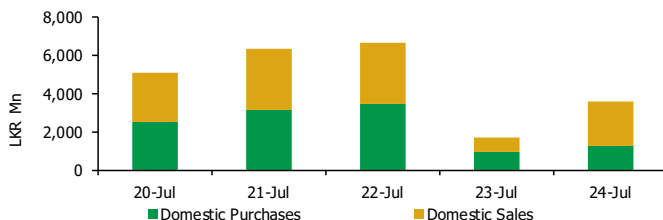
Contributors to ASPI

Positive Contributors (No.)	73	Negative Contributors (No.)	130
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Turnover Breakdown

Domestic



* Not Meaningful

Sources: CSE, Refinitiv Eikon

Daily Foreign Participation

Top Net Foreign Activities (Based on Value)

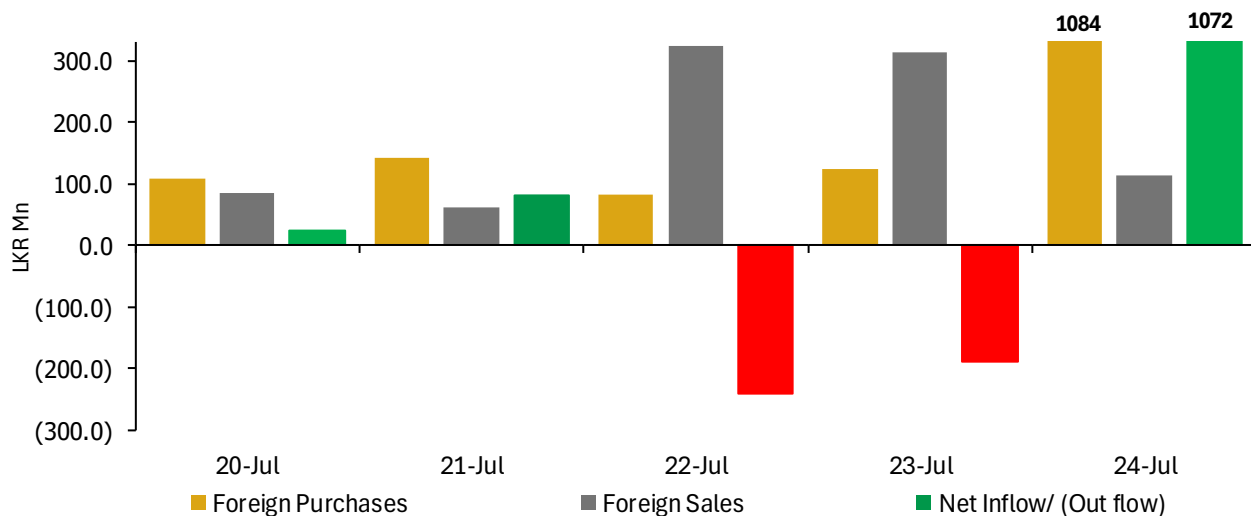
Top Net Foreign Purchases	LKR Mn	Top Net Foreign Sales	LKR Mn
UML	1,026.00	HNB(X)	(64.97)
COMB	64.87	MELS	(21.16)
HNB	39.42	SAMP	(11.00)
LMF	20.40	LOFC	(3.99)
CCS	11.09	ASCO	(2.70)

Annual Foreign Participation

Year	Foreign Purchases (LKR Mn)	Foreign Sales (LKR Mn)	Net (LKR Mn)
2020	53,023	104,246	(51,223)
2021	34,018	86,665	(52,647)
2022	67,484	36,878	30,606
2023	41,470	48,766	(7,296)
2024	48,686	58,579	(9,893)
2025	61,283	95,672	(34,389)
2026*	24,980	61,206	(36,227)

*From January 02 to July 24, 2026

Foreign Activities During Last 5 Days



Daily Turnover Breakdown by Sector

Sector	Turnover (LKR)	%
Retailing	336,666,688.30	42.30%
Banks	158,652,646.00	21.70%
Capital Goods	143,834,110.65	11.70%
Diversified Financials	78,419,712.30	6.61%
Food Beverage & Tobacco	49,433,730.10	6.09%
Insurance	132,374,806.45	4.71%
Materials	159,492,273.95	2.46%
Consumer Services	16,001,211.60	1.44%
Real Estate Management & Development	65,982,965.10	1.15%
Utilities	486,016,259.00	2.46%
Consumer Durables & Apparel	13,199,606.00	0.36%
Health Care Equipment & Services	18,261,812.60	0.25%
Transportation	70,793,959.55	0.25%
Energy	8,930,311.20	0.15%
Telecommunication Services	5,349,384.95	0.15%
Food & Staples Retailing	4,883,483.70	0.10%
Software & Services	4,846,930.10	0.14%
Commercial & Professional Services	832,888.25	0.06%
Automobiles & Components	2,557,635.50	0.03%
Household & Personal Products	131,389.90	0.01%

Total Turnover (LKR)	2,450,030,702
YTD Avg. Turnover (LKR)	4,104,372,202
Monthly Avg. Turnover (LKR)	1,737,874,389

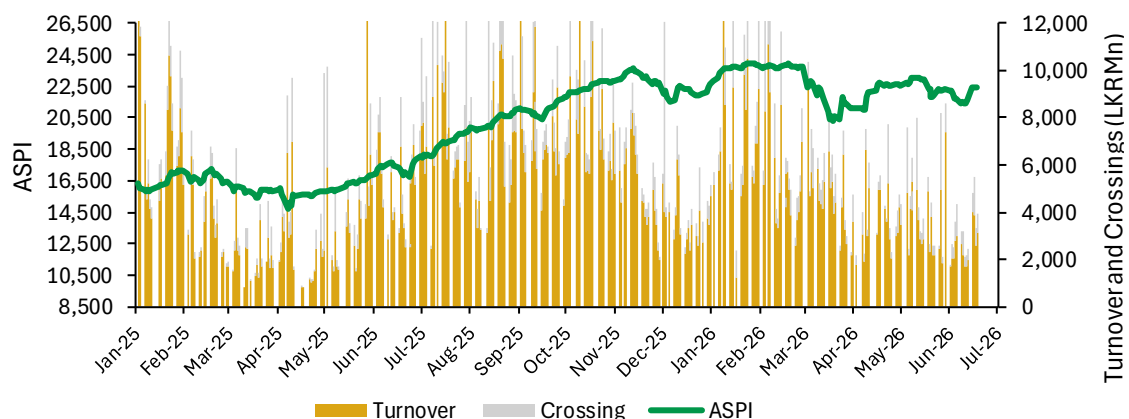
Source: CSE

Monthly Crossings as a % of Total Turnover

Month	Market Turnover (LKR Mn)	Crossings (LKR Mn)	Crossings as a % of Market Turnover
2025			
January	140,432	21,543	15%
February	58,416	9,859	17%
March	39,349	10,677	27%
April	48,268	19,460	40%
May	79,998	31,142	39%
June	91,895	11,014	12%
July	157,486	48,290	31%
August	124,835	51,169	41%
September	148,757	41,127	28%
October	157,220	39,477	25%
November	94,686	15,711	17%
December	68,772	19,083	28%
2026			
January	131,273	29,801	23%
February	106,729	29,230	27%
March	98,825	18,314	19%
April	65,791	11,244	17%
May	69,295	17,970	26%
June	47,364	12,843	27%
July	31,282	14,116	45%

*Upto July 24, 2026

ASPI vs Market Turnover



Source: CSE

Top 5 Share Volume Contributors and Their Price Trends

20-Jul				21-Jul				22-Jul				23-Jul				24-Jul			
Stock	Price (LKR)	Chg (%)	Volume	Stock	Price (LKR)	Chg (%)	Volume	Stock	Price (LKR)	Chg (%)	Volume	Stock	Price (LKR)	Chg (%)	Volume	Stock	Price (LKR)	Chg (%)	Volume
ASPH	0.60	0.00%	10,671,654	ASPH	0.60	0.00%	1,217,500	ASPH	0.60	0.00%	1,032,746	ASPH	0.60	0.00%	28,557	ASPH	0.60	0.00%	425,263
SEMB	0.90	-10.00%	8,132,093	SEMB	0.90	0.00%	1,316,568	SEMB	1.00	11.11%	1,283,206	SEMB	1.00	0.00%	166,481	SEMB	1.00	0.00%	10,329,192
JKH	19.70	-1.01%	5,524,178	JKH	19.80	0.51%	489,792	JKH	19.60	-1.01%	2,513,517	JKH	19.60	0.00%	12,786,719	JKH	19.60	0.00%	2,708,744
LMF	84.00	-0.59%	3,319,418	LMF	83.60	-0.48%	77,047	LMF	83.50	-0.12%	255,320	LMF	83.40	-0.12%	144,110	LMF	83.40	0.00%	334,446
BIL	5.30	-1.85%	2,996,569	BIL	5.20	-1.89%	5,110,560	BIL	5.30	1.92%	1,045,251	BIL	5.30	0.00%	695,230	BIL	5.30	0.00%	1,341,712
				BIL	5.20	-1.89%	5,110,560	BIL	5.30	1.92%	1,045,251	BIL	5.30	0.00%	695,230	BIL	5.30	0.00%	1,341,712
				SEMB(X)	0.30	0.00%	2,955,187	SEMB(X)	0.30	0.00%	1,656,805	SEMB(X)	0.30	0.00%	365,996	SEMB(X)	0.30	0.00%	2,514,642
				CARG	630.00	0.04%	3,691,484	CARG	638.25	1.31%	106	CARG	629.25	-1.41%	437	CARG	634.25	0.79%	2,970
				ASPH	0.60	0.00%	1,217,500	ASPH	0.60	0.00%	1,032,746	ASPH	0.60	0.00%	28,557	ASPH	0.60	0.00%	425,263
				MELS	181.00	-0.55%	1,006,232	MELS	180.75	-0.14%	12,505	MELS	179.50	-0.69%	256,353	MELS	180.50	0.56%	122,861
								ONAL	49.80	3.75%	47,335,537	ONAL	48.30	-3.01%	1,463	ONAL	47.80	-1.04%	276
								DIAL	43.70	-0.23%	2,967,348	DIAL	43.70	0.00%	81,340	DIAL	43.80	0.23%	72,021
								HNBF	8.30	1.22%	2,451,423	HNBF	8.40	1.20%	1,045,064	HNBF	8.40	0.00%	423,829
								JKH	19.60	-1.01%	2,513,517	JKH	19.60	0.00%	12,786,719	JKH	19.60	0.00%	2,708,744
								SEMB(X)	0.30	0.00%	1,656,805	SEMB(X)	0.30	0.00%	365,996	SEMB(X)	0.30	0.00%	2,514,642
												JKH	19.60	0.00%	12,786,719	JKH	19.60	0.00%	2,708,744
												CBNK	7.70	0.00%	2,034,978	CBNK	7.70	0.00%	223,183
												CITW	1.60	0.00%	1,968,796	CITW	1.60	0.00%	2,731,473
												KZOO	8.90	4.71%	1,322,206	KZOO	8.90	0.00%	410,929
												HNBF	8.40	1.20%	1,045,064	HNBF	8.40	0.00%	423,829
																UML	26.90	-0.37%	38,147,493
																LOFC	5.40	10.20%	11,781,431
																SEMB	1.00	0.00%	10,329,192
																CITW	1.60	0.00%	2,731,473
																JKH	19.60	0.00%	2,708,744

Source: CSE