

Foreign purchases account for 41% of the turnover

Indices closed in green as a result of price gains in counters such as Melstacorp, Dialog Axiata and Commercial Bank with the turnover crossing Rs 150 Mn. High net worth and institutional investor participation was witnessed in Sampath Bank, Dialog Axiata and John Keells Holdings. Mixed interest was observed in Lion Brewery and Teejay Lanka. Furthermore, foreigners remained active closing as net buyers mainly due to foreign purchasing in John Keells Holdings and Dialog Axiata. Total foreign purchases accounted for 41.3% of the turnover.

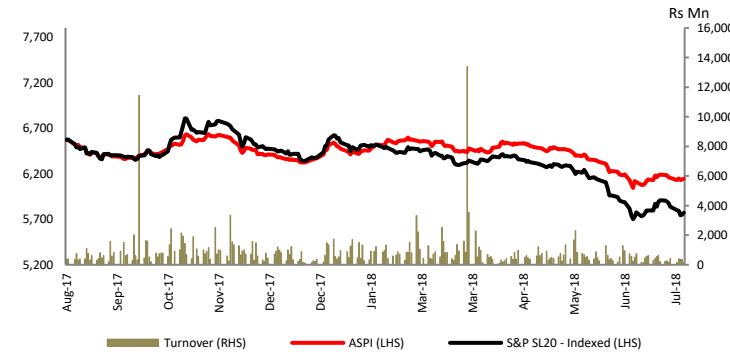
During the week, the ASPI lost 0.16% while the S&P SL20 lost 1.13%. Meanwhile, average daily turnover for the week was recorded at Rs 291 Mn.

Diversified sector was the top contributor to the market turnover (due to John Keells Holdings) whilst the sector index gained 0.35%. The share price of John Keells Holdings decreased by Rs 0.50 (0.36%) closing at Rs 138.00 whilst foreign holdings increased by 171,210 shares.

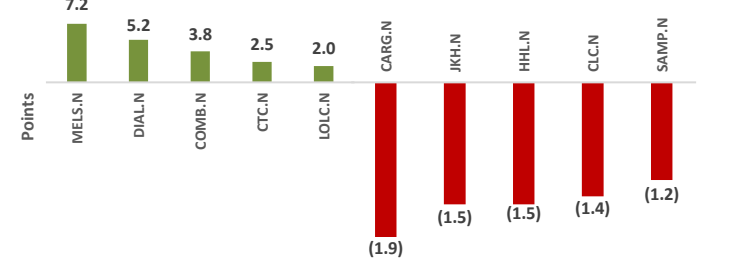
Banks, Finance and Insurance sector was the second highest contributor to the market turnover (due to Sampath Bank) whilst the sector index edged up by 0.04%. The share price of Sampath Bank moved down by Rs 2.00 (0.69%) to close at Rs 288.00.

Dialog Axiata, Ceylon Tobacco Company and Lion Brewery were also included amongst the top turnover contributors. The share price of Dialog Axiata gained Rs 0.30 (2.11%) closing at Rs 14.50 whilst foreign holdings increased by 1,935,920 shares. The share price of Ceylon Tobacco Company recorded a gain of Rs 6.30 (0.53%) to close at Rs 1,202.70. The share price of Lion Brewery edged up Rs 0.20 (0.03%) to close at Rs 620.20.

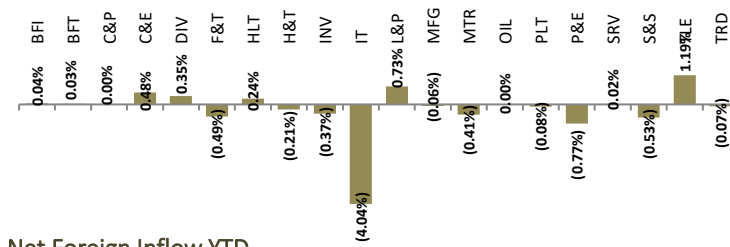
CSE Equity Market Performance – One year



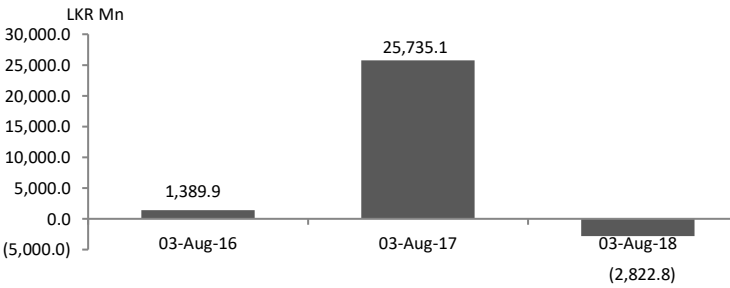
Positive and Negative Contributors to ASPI



CSE All Share Sector Daily Returns



Net Foreign Inflow YTD



Equity Market Performance

	Today	Previous Day	Change (%)
ASPI	6,143.90	6,136.35	0.12
S&P SL20	3,322.25	3,309.50	0.39
Volume (Shares)	10,991,792	10,012,062	9.79
Turnover (Rs)	150,470,962	349,196,093	(56.91)
Foreign Purchases (Rs)	62,103,724	69,321,871	(10.41)
Foreign Sales (Rs)	12,239,840	85,929,572	(85.76)
PER	9.68	9.77	(0.92)
PBV	1.20	1.21	(0.83)

Top Turnover Contributors	Volume	Turnover	%
John Keells Holdings	262,934	36,285,540	24.11
Dialog Axiata	2,097,310	30,385,429	20.19
Sampath Bank	76,769	22,186,132	14.74
Ceylon Tobacco Company	6,960	8,352,338	5.55
Lion Brewery	13,401	8,311,121	5.52

Profit Attributable to Equity Holders for the Quarter Ended June (Rs Mn)			
	2018	2017	%
Galadari Hotels	(9.32)	(26.91)	65.38
Sampath Bank	3,691.90	3,486.37	5.90
Softlogic Life Insurance	286.02	271.85	5.21
Talawakelle Tea Estates	46.27	45.73	1.18

Source: Colombo Stock Exchange

Fixed Income Market Performance

Treasury Bond Rates (Secondary Market)			03/08/18
Maturity	Ask (Closing)	Bid (Closing)	
15-01-2019	8.50	8.70	
01-08-2020	9.40	9.55	
15-12-2021	9.65	9.80	
01-10-2022	9.85	10.00	
15-03-2023	9.95	10.05	
01-08-2024	10.00	10.10	
01-08-2025	10.10	10.20	
Excess Liquidity	Rs 37.12 Bn		
Exchange Rate (Spot Next)	Rs 159.75-159.85 per USD		

Source: MVS Money Brokers

Treasury Bill Rates (Primary Auction)				01/08/18
Maturity	01/08/18	24/07/18	01/08/17	
91 days	8.17	8.24	9.03	
182 days	rejected	8.74	9.16	
364 days	9.23	9.27	9.48	

Source: CBSL

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