

**5<sup>th</sup> November 2024**

## Daily Market Watch

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# Stock Market takes a breather after a weeks-long rally set a new high for the year...

### Market Commentary

The All-Share Price Index (ASPI) ended the trading session lower today, declining by 0.46% to close at 12,795.96. The S&P SL20 index, which tracks more liquid stocks, also declined by 0.58% to close at 3,852.62.

Market turnover for the day reached LKR 2.4 billion, marking a 28% increase and exceeded the daily average turnover of LKR 1.7 billion. The banking sector led the turnover, driven by HNB with a contribution of LKR 758.1 million, followed by Sampath Bank at LKR 237.4 million.

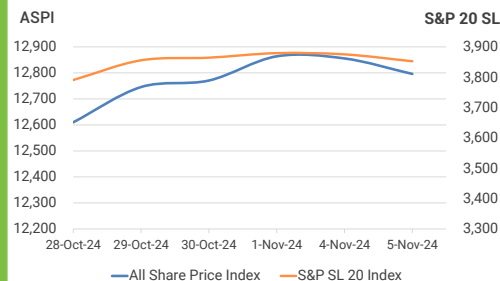
Meanwhile, as the September earnings season is in full swing with little over one fifth of the listed companies reporting results so far, companies have shown a mixed performance.

In other news, John Keells Holdings PLC (JKH.N0000) will resume share trading tomorrow following a share subdivision.

### Market Performance

	05.11.2024	04.11.2024	%Change
All Share Price Index (ASPI)	12,795.96	12,855.44	(0.46)
S&P Sri Lanka 20 Index	3,852.62	3,875.22	(0.58)
Turnover (LKR mn)	2,382.29	1,860.72	28.03
Foreign Purchases (LKR mn)	42.89	75.79	(43.40)
Foreign Sales (LKR mn)	27.13	107.16	(74.68)
Market Cap (LKR bn)	4,694.08	4,709.38	(0.32)
Market Cap (USD bn)	16.02	16.07	(0.32)
Traded Companies	257.00	254.00	-
Market PER (x)	8.58	8.61	(0.35)
Price to Book (x)	1.01	1.02	(0.98)
Dividend Yield (%)	4.24	4.22	0.02

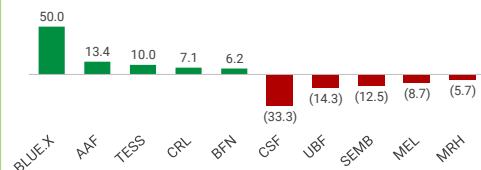
### Market Benchmarks



### Dividend Announcements

Company Code	Dividend (LKR)	XD Date	Payment Date
LION	17.30	06.11.2024	26.11.2024
CCS	1.16	11.11.2024	29.11.2024
KFP	0.48	11.11.2024	29.11.2024
VLL.N	0.20	13.11.2024	03.12.2024
VLL.X	0.20	13.11.2024	03.12.2024
PKME	1.00	18.11.2024	04.12.2024

### Top % Gainers and Losers

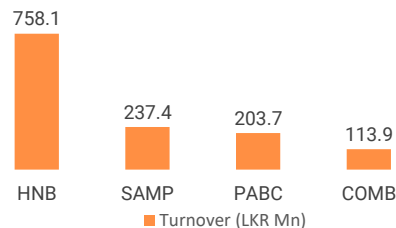


### Relative Strength Index (RSI)

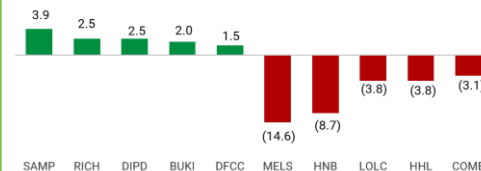
RSI 81.51



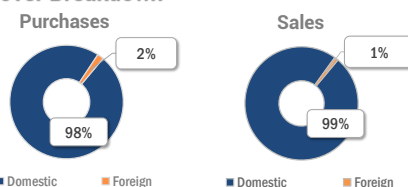
### Largest Trades



### Contributors to ASPI



### Turnover Breakdown



### Key Rates

05.11.2024

Prime Lending Rate (Weekly Avg. Weighted %)	9.05
Fixed Deposit Rate (Avg. Weighted %)	9.46
Treasury Bill Rate (364 Days %)	9.95
Consumer Price Inflation - CCPI (YoY %)	-0.8

### Daily Change in Foreign Holdings

Company Name	Code	(LKR mn)
Net Foreign Purchases		
Commercial Bank of Ceylon PLC	COMB	11.69
Vallibel Finance PLC	VFIN	6.75
Acl Plastics PLC	APLA	3.66
PGP Glass Ceylon PLC	GLAS	3.36
Sunshine Holdings PLC	SUN	3.14
Total		42.89
Net Foreign Sales		
Hatton National Bank PLC	HNB	(10.19)
Dipped Products PLC	DIPD	(5.45)
Commercial Bank of Ceylon PLC (X)	COMB	(3.20)
Seylan Bank PLC	SEYB	(2.10)
Melstacorp PLC	MELS	(1.73)
Total		27.13