



2026

APRIL

MARKET LENS & ECONOMIC PULSE

This report delivers a strategic overview of capital market performance and key economic indicators in Sri Lanka, offering decision-makers a structured view of market direction, risks, and opportunities within the current macroeconomic landscape.

ABOUT COLOMBO STOCK EXCHANGE

The Colombo Stock Exchange (CSE) is Sri Lanka's principal stock exchange and the only licensed securities exchange in the country established to provide a platform for buying and selling stocks and other tradable securities.

Market Operator: It provides a fair, transparent, and orderly trading platform for securities including equities (shares), corporate debt, and government debt instruments.

Capital Raising: Enables companies to raise capital, supporting business expansion and economic growth.

Clearing & Settlement: Through its fully owned subsidiary, the Central Depository Systems (Pvt.) Ltd. (CDS), the CSE facilitates clearing, settlement, and safekeeping of securities.

Regulation & Governance: It oversees compliance with listing rules, promotes good corporate governance, and supports transparent disclosure by listed companies.

Investor Education: Actively involved in improving financial literacy and investor awareness through programs and educational initiatives

MAIN ECONOMIC INDICATORS

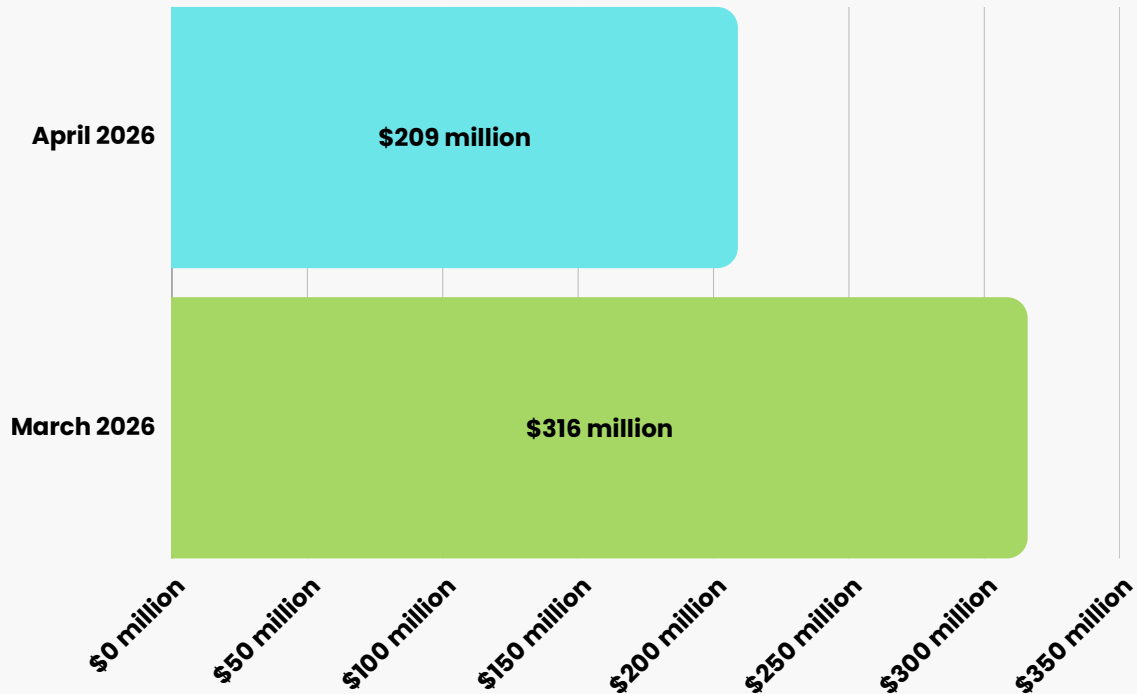
To analyze the current economic situation, the main macroeconomic indicators are used: inflation rate, exchange rate, policy interest rate, and Statutory Reserve Ratio (SRR). These indicators provide a comprehensive view of price stability, currency performance, monetary policy stance, and liquidity conditions in the economy.

General Inflation 5.40%	Policy Interest Rate and SRR 7.75%	Exchange Rate LKR to USD 315.87
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As at 30 April 2026

Real GDP Growth: 2025 5.0%		NCPI Y-o-Y Change: March 2026 2.4%		CCPI Y-o-Y Change: April 2026 5.4%	
Exchange Rates			Currency and Reserve Money		
	TT Buying ^(a) (Rs. Per Unit)	TT Selling ^(a) (Rs. Per Unit)	(Rs.mn)		
30-Apr-26			29-Apr-26	30-Apr-26	
USD	315.8712	323.8049	Currency in Circulation	1,682,707.60	1,682,816.66
GBP	424.6432	437.5216	Reserve Money	1,924,201.67	1,939,198.63
EUR	367.2915	379.1375			
JPY	1.9633	2.0291			
Indicative Rate of the USD/LKR Spot Exchange Rate 					
Money Market					
Policy Rate (OPR): 7.75%		SRR: 2.00%		Weekly AWPR: 9.57%	
Overnight Money Market 			Yield Rates of T-Bills (per cent)		
			Primary Market	Secondary Market	
			29-Apr-26	30-Apr-26 ^(b)	
			91 Day	8.20	8.19
			182 Day	8.25	8.25
			364 Day	8.52	8.49
Overnight Liquidity (Rs. bn)			29-Apr-26	30-Apr-26	
			248.48	218.70	
Source: Central Bank of Sri Lanka			Source: Ministry of Finance, Planning and Economic Development		

MARKET TURNOVER



MARKET TURNOVER HIGHLIGHTS

-  Revenue (\$ Mn)
209.08
-  Domestic Turnover (\$ Mn)
193.32
-  Foreign Turnover (\$ Mn)
15.77

Companies Listed	ASPI Performance (April)	Market Performance (2025)
290	-0.33%	41.89%

TURNOVER

	Apr 2026	Mar 2026	Feb 2026	Jan 2026	Dec 2025	Nov 2025	Oct 2025
Total Turnover (\$ Mn)	209.08	314.06	339.19	428.42	254.91	314.06	478.41
Domestic Turnover (\$ Mn)	193.32	301.98	294.22	405.06	245.89	298.26	451.46
Foreign Turnover (\$ Mn)	15.77	12.09	44.96	23.36	9.02	15.80	26.95
Daily Average Turnover (\$ Mn)	11.62	14.95	17.85	21.42	12.14	16.53	25.18
Crossings TO/Total TO (%)	17.09%	18.53%	27.39%	22.11%	16.78%	16.59%	26.80%
Market Liquidity (Equity)							
Share Volume (Mn)	3.15	4.66	4.33	3.94	2.47	3.02	6.25
No. of Trades (No.'000)	571.15	844.42	743.93	884.93	657.55	693.45	797.21
Daily Average Trades (No.)	31,731	40,210	39,154	44,246	31,312	36,498	41,958
Market Size (Equity)							
Market Capitalization (\$ Bn)	25.98	23.90	26.78	27.01	26.76	26.94	26.94
Market Multiples							
Market P/E (x)	11.57	10.64	11.66	11.30	10.73	11.16	10.06
Market P/BV (x)	1.42	1.31	1.50	1.52	1.45	1.50	1.50
Dividend Yield (%)	2.83	3.07	2.62	2.49	2.62	2.37	2.36
Companies Listed (@ EOY)	290	289	289	289	288	285	284
Trading Period							
No. of Market Days	18	21	19	20	21	19	19

CONTRIBUTION TO TURNOVER

	2026	2025	2024	2023	2022	2021	2020
Foreign Companies (%)	6.47%	4.84%	8.72%	8.29%	6.60%	4.32%	19.03%
Foreign Individuals (%)	0.98%	1.34%	1.19%	1.27%	1.00%	0.83%	0.77%
Total Foreign Contribution (%)	7.45%	6.19%	9.90%	9.56%	7.60%	5.14%	19.80%
Domestic Companies (%)	44.03%	44.49%	44.85%	44.65%	37.67%	37.69%	32.21%
Domestic Individuals (%)	48.52%	49.32%	45.24%	45.79%	54.73%	57.16%	48.02%
Total Domestic Contribution (%)	92.56%	93.82%	90.10%	90.44%	92.40%	94.86%	80.23%

FOREIGN TRADING ACTIVITIES

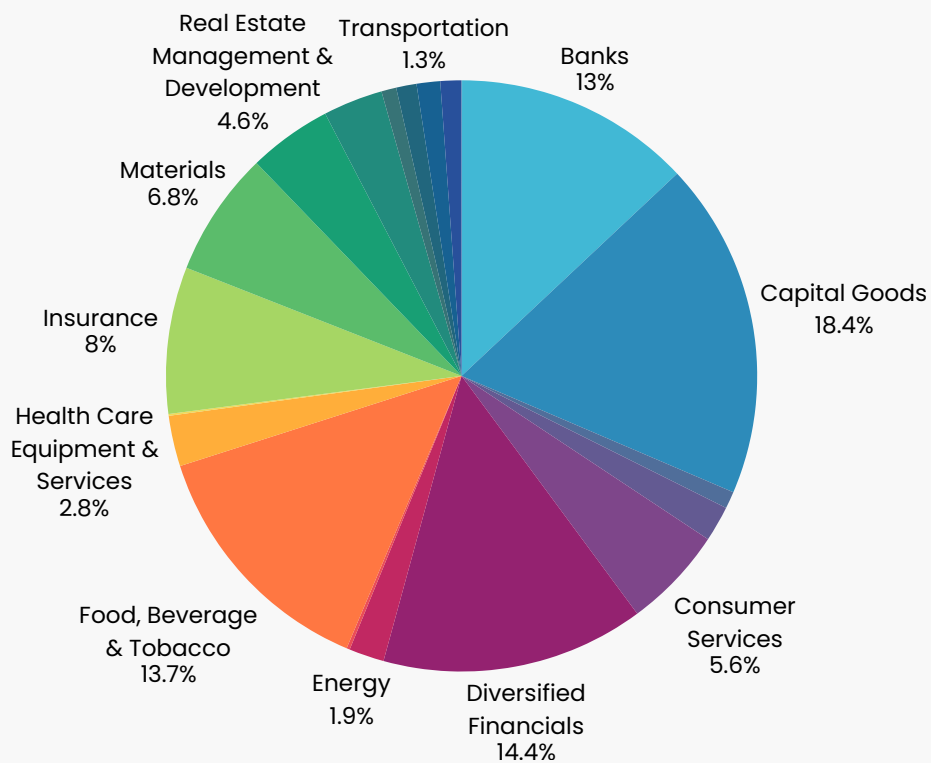
	2026	2025	2024	2023	2022	2021	2020
Primary Market							
Purchases (\$ Mn)		1.03	100.51	5.26	72.86	27.59	50.10
Sales (\$ Mn)		-	-	-	-	-	-
Net foreign Flow (\$ Mn)		1.03	100.51	5.26	72.86	27.59	50.10
Secondary Market							
Foreign Purchases (\$ Mn)	56.57	188.83	155.74	120.67	239.51	176.33	287.51
Foreign sales (\$ Mn)	135.78	316.95	189.73	107.97	130.83	449.24	566.69
Net Foreign Flow (\$ Mn)	-79.21	-128.12	-33.99	12.70	108.69	-272.91	-279.18
Total Net foreign Flow (\$ Mn)	-79.21	-127.09	66.52	17.97	181.54	-245.32	-229.08

GICS SECTOR WISE TURNOVER (%)

The numbers below are rounded up.

As at 30 April 2026

- Automobiles & Components ● Banks
- Capital Goods
- Commercial & Professional Services
- Consumer Durables & Apparel
- Consumer Services
- Diversified Financials ● Energy
- Food & Staples Retailing
- Food, Beverage & Tobacco
- Health Care Equipment & Services
- Household & Personal Products
- Insurance ● Materials
- Real Estate Management & Development
- Retailing ● Software & Services
- Telecommunication Services
- Transportation ● Utilities



April Market Turnover: \$209.08 million

SECTOR WISE PERFORMANCE

SECTOR	TURNOVER (MARCH)	TURNOVER (APRIL)	PERFORMANCE (APRIL)
Turnover = \$209.08 million			
Automobiles & Components	0.05%	0.03%	-0.02%
Banks	17.19%	12.98%	-4.21%
Capital Goods	27.62%	18.43%	-9.19%
Commercial & Professional Services	0.44%	0.93%	0.49%
Consumer Durables & Apparel	1.79%	1.95%	0.16%
Consumer Services	1.68%	5.56%	3.88%
Diversified Financials	13.16%	14.39%	1.09%
Energy	2.76%	1.92%	-0.84%
Food & Staples Retailing	0.16%	0.18%	-0.02%
Food, Beverage & Tobacco	11.05%	13.71%	2.66%
Health Care Equipment & Services	0.63%	2.77%	2.14%
Household & Personal Products	0.01%	0.10%	0.09%
Insurance	5.93%	8.02%	0.75%
Materials	6.80%	6.84%	2.09%
Real Estate Management & Development	4.43%	4.57%	0.14%
Retailing	3.36%	3.26%	0.10%
Software & Services	0.29%	0.81%	0.52%
Telecommunication Services	0.74%	1.11%	0.37%
Transportation	0.88%	1.29%	0.41%
Utilities	0.92%	1.15%	0.23%

INDEX PERFORMANCE

	Apr 2026	Mar 2026	Feb 2026	Jan 2026	Dec 2025	Nov 2025	Oct 2025
All Share Price Index	22,549.53	21,066.18	23,734.06	23,812.31	22,624.31	22,712.82	22,804.84
ASPI MTD Return	7.04%	-11.24%	-0.33%	5.25%	-0.39%	-0.40%	4.71%
ASPI YTD Return (%)	-0.33% ↓	-6.89% ↓	4.91% ↑	5.25% ↑	41.89% ↑	42.45% ↑	43.03% ↑
S&P SL20 Index	6,207.56	5,904.10	6,635.97	6,641.15	6,157.38	6,267.03	6,213.91
S&PSL20 MTD Return	5.14%	-11.03%	-0.08%	7.86%	-1.75%	0.85%	1.43%
S&P SL20 YTD Return (%)	0.81% ↑	-4.11% ↓	7.77% ↑	7.86% ↑	26.64% ↑	28.90% ↑	27.80% ↑

FOREIGN TRADING ACTIVITY

	2026	2025	2024	2023	2022	2021	2020
Primary Market							
Purchases (\$ Mn)		1.03	100.51	5.26	72.86	27.59	50.10
Sales (\$ Mn)		-	-	-	-	-	-
Net foreign Flow (\$ Mn)		1.03	100.51	5.26	72.86	27.59	50.10
Secondary Market							
Foreign Purchases (\$ Mn)	56.57	188.83	155.74	120.67	239.51	176.33	287.51
Foreign sales (\$ Mn)	135.78	316.95	189.73	107.97	130.83	449.24	566.69
Net Foreign Flow (\$ Mn)	-79.21	-128.12	-33.99	12.70	108.69	-272.91	-279.18
Total Net foreign Flow (\$ Mn)	-79.21	-127.09	66.52	17.97	181.54	-245.32	-229.08

INDEX PERFORMANCE (ANNUAL)

	2026	2025	2024	2023	2022	2021	2020
All Share Price Index	22,549.53	22,624.31	15,944.61	10,654.16	8,489.66	12,226.01	6,774.22
Return (%)	-0.33% ↓	41.89% ↑	49.66% ↑	25.50% ↑	-30.56% ↓	80.48% ↑	10.52% ↑
S&P SL 20 Index	6,207.56	6,157.38	4,862.10	3,068.36	2,635.63	4,233.25	2,638.10
Return (%)	0.81% ↑	26.64% ↑	58.46% ↑	16.42% ↑	-37.74% ↓	60.47% ↑	-10.18% ↓
Highest ASPI	23,992.11	23,659.70	15,944.61	11,724.22	13,462.39	12,226.01	6,774.22
Lowest ASPI	20,264.01	14,660.45	10,274.39	8,262.58	6,905.37	6,854.32	4,247.95
Highest S&P SL20	6,750.50	12,114.26	4,862.10	3,470.13	4,627.03	4,253.83	2,929.09
Lowest S&P SL20	5,651.41	4,264.84	2,896.48	2,420.73	2,125.96	2,687.45	1,685.45

MARKET HIGHLIGHTS

	2026	2025	2024	2023	2022	2021
Total Turnover (\$ Mn)	1,290.75	4,088.45	1,743.96	1,195.37	2,436.73	6,081.30
Domestic Turnover (\$ Mn)	1,194.58	3,835.56	1,571.22	1,081.05	2,251.56	5,768.52
Foreign Turnover (\$ Mn)	96.17	252.89	172.74	114.32	185.17	312.78
Daily Average Turnover (\$ Mn)	16.55	17.18	7.27	4.94	10.55	25.34
Crossings TO/Total TO (%)	21.81%	21.10%	23.88%	19.18%	11.24%	8.76%
Turnover Velocity (%)	15.39%	18.06%	10.81%	10.06%	15.28%	27.77%
Market Liquidity (Equity)						
Share Volume (Mn)	16.08	46.65	23.25	16.99	29.05	59.77
No. of Trades (No.'000)	3,044.42	7,493.00	3,524.07	3,618.96	6,057.23	8,131.51
Daily Average Trades (No.)	39,031	31,483	14,684	14,954	26,222	33,881
Market Size (Equity)						
Market Capitalization (\$ Bn)	25.98	26.76	18.47	12.37	13.65	28.45
Market Cap- to-GDP (%)	27.34%	26.99%	19.05%	14.21%	12.87%	18.36%
Market Multiples						
Market P/E (x)	11.57	10.73	8.89	11.10	4.95	13.63
Market P/BV (x)	1.42	1.45	1.17	0.93	0.91	1.67
Dividend Yield (%)	2.83	2.62	3.57	3.31	4.10	2.17
Companies Listed (@ EOY)	290	288	284	290	290	296
Trading Period						
No. of Market Days	78	238	240	242	231	240

HISTORICAL MILESTONES

Highest Ever...	Value	Date
ASPI	23,992.11	January 28, 2026
S&P SL20	12,114.26	February 18, 2026
Market Cap (\$ Mn)	27,209.61	January 28, 2026
Trades (No.)	86,492	March 3, 2026
Daily Turnover (\$ Mn)	106.22	April 1, 2008

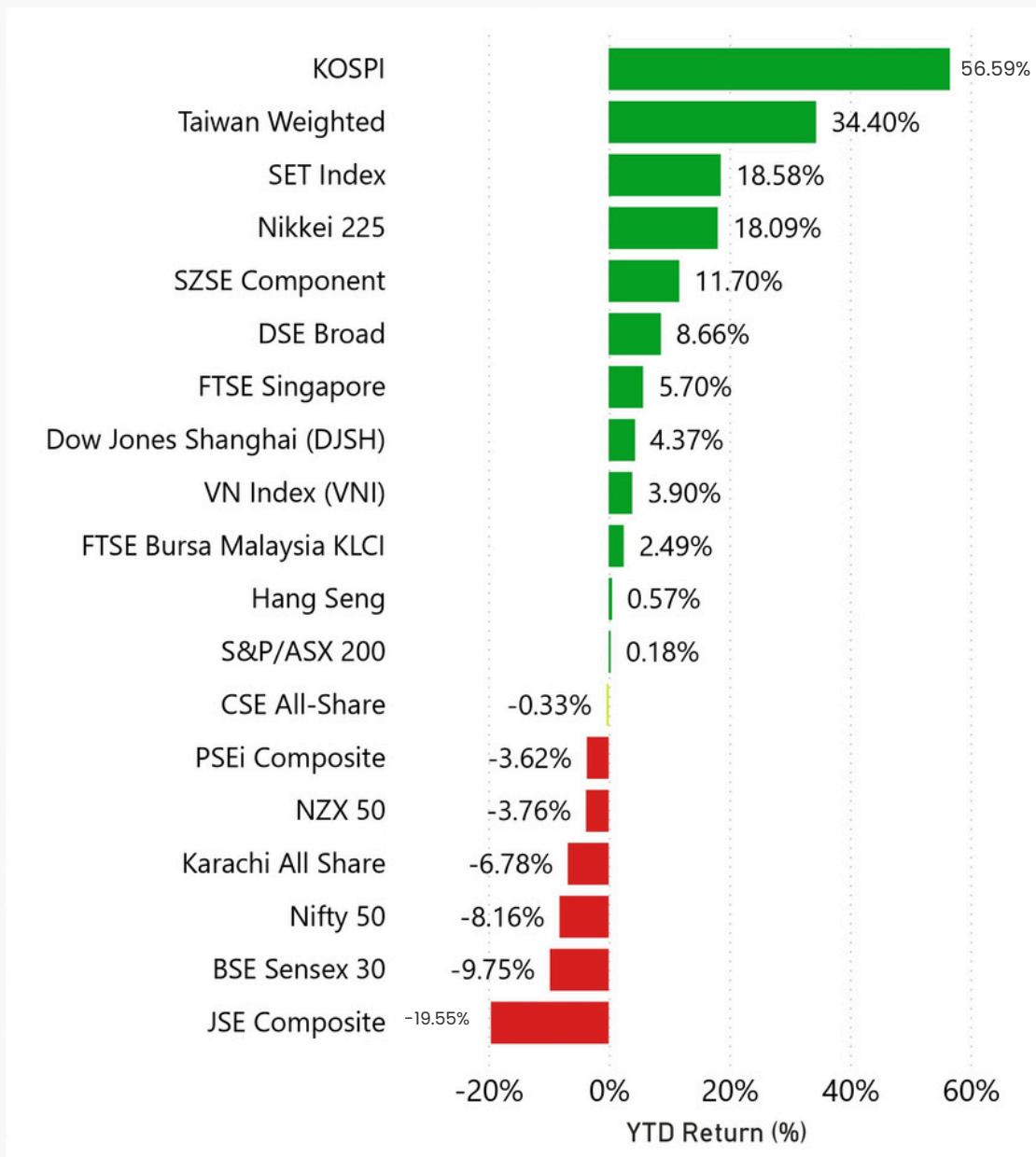
REGIONAL MARKET PERFORMANCE 2026

(Data for the month ended 30 April 2026)

Country	Index	Daily Return	YTD Return
South Korea	KOSPI	-1.38%	56.59%
Taiwan	Taiwan Weighted	-0.96%	34.40%
Thailand	SET Index	0.13%	18.58%
Japan	Nikkei 225	-0.35%	18.09%
China	SZSE Component	-0.09%	11.70%
Bangladesh	DSE Broad	-0.57%	8.66%
Singapore	FTSE Singapore	-0.48%	5.70%
China	Dow Jones Shanghai (DJSH)	0.29%	4.37%
Vietnam	VN Index (VNI)	-1.16%	3.90%
Malaysia	FTSE Bursa Malaysia KLCI	0.09%	2.49%
Hong Kong	Hang Seng	-1.28%	0.57%
Australia	S&P/ASX 200	0.74%	0.18%
Sri Lanka	CSE All-Share	-0.38%	-0.33%
Philippines	PSEi Composite	-1.26%	-3.62%
New Zealand	NZX 50	1.05%	-3.76%
Pakistan	Karachi All Share	-1.65%	-6.78%
India	Nifty 50	-0.74%	-8.16%
India	BSE Sensex 30	-0.75%	-9.75%
Indonesia	JSE Composite	-2.03%	-19.55%

MARKET PERFORMANCE BY YTD RETURN

(Data for the month ended 30 April 2026)



THANK YOU!

This month's market performance and economic data continue to highlight the powerful connection between long-term investing and economic growth. The market remains one of the best ways to create wealth and value and the time to participate is now.



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