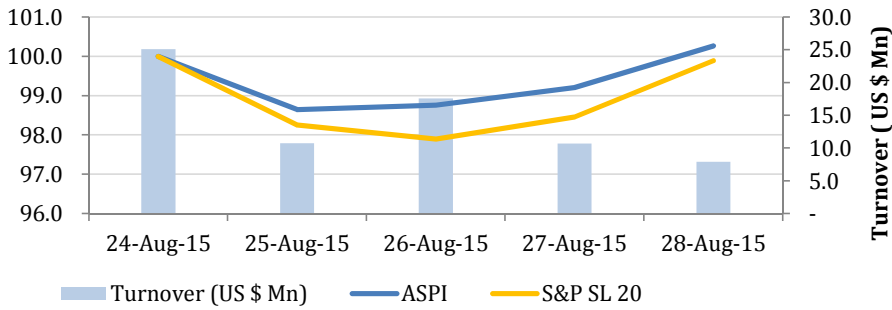




# WEEKLY FOCUS

## FOR WEEK ENDED 28<sup>TH</sup> AUGUST 2015

Figure 1: Index Performance



Index	Open	Close	% Change	Point Change
ASPI	7,471.17	7,350.52	↓ -1.61%	△ -120.65
S&P SL 20	4,140.68	4,049.15	↓ -2.21%	△ -91.53

Figure 2: ASPI Performance against regional indices

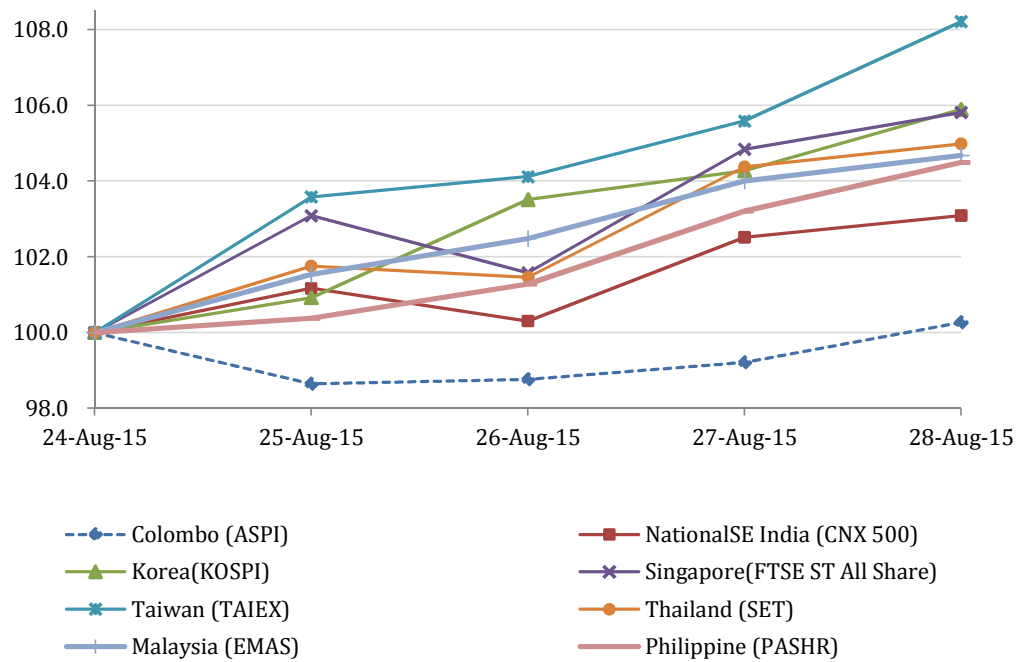
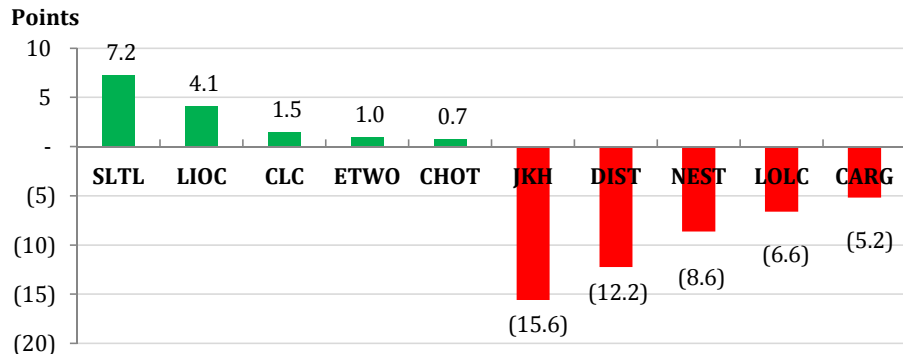


Figure 3: Top 5 Positive & Negative Contributors to ASPI for the week



Positive Contributors (No.)	49
Negative Contributors (No.)	178

**Table1: Market Activity Summary**

	This week	Last week	% Change
<b>Equity</b>			
Turnover (US \$ Mn)	72.0	54.1	33%
Daily Average Turnover (US \$ Mn)	14.4	10.8	33%
Share Volume (No. Mn)	578.0	283.1	104%
Trades (No.)	41,739	44,709	-7%
Market Capitalization (US \$ Bn)	23.2	23.7	-2%
<b>Corporate Debt</b>			
Turnover (US \$ 000)	647.7	192.6	236%
Trades (No.)	2	1	100%
Debentures Traded (No. 000)	751	250	200%
<b>Closed End Fund</b>			
Turnover (US \$ 000)	1.3	4.1	-70%
Trades (No.)	5	15	-67%
Units Traded (No. 000)	1.6	5.0	-68%

**Table2: Weekly Sector Overview**

Sector	Closing Index for the week	Change % during the week	Market Capitalization ( US \$ Bn )	% of Total Market Capitalization	Turnover ( US \$ Mn )	% of Total Turnover
Bank Finance & Insurance	19,221.70	-2.0%	5.84	25.2%	14.5	21.1%
Beverage Food & Tobacco	22,660.94	-2.3%	4.23	18.3%	4.6	6.7%
Chemicals & Pharmaceuticals	8,108.17	-3.5%	0.16	0.7%	0.2	0.3%
Construction & Engineering	3,296.76	-0.5%	0.36	1.6%	1.1	1.6%
Diversified Holdings	1,961.50	-2.2%	4.07	17.6%	32.4	47.2%
Footwear & Textile	972.30	-3.3%	0.09	0.4%	0.1	0.1%
Healthcare	875.87	-1.9%	0.38	1.6%	1.3	1.8%
Hotels & Travels	3,407.86	-0.7%	2.66	11.5%	1.0	1.4%
Investment Trusts	19,808.37	-2.0%	0.28	1.2%	0.3	0.4%
IT	75.00	-2.9%	0.01	0.0%	0.0	0.0%
Land & Property	710.67	-1.6%	0.38	1.6%	0.3	0.4%
Manufacturing	4,670.29	-1.5%	1.35	5.8%	6.0	8.7%
Motors	19,368.34	-1.8%	0.20	0.9%	0.2	0.2%
Oil Palms	109,909.48	-7.3%	0.85	3.7%	0.0	0.0%
Plantations	780.98	-1.4%	0.20	0.9%	0.4	0.7%
Power & Energy	184.73	2.0%	0.41	1.8%	3.9	5.7%
Services	26,470.41	0.6%	0.06	0.3%	0.7	1.1%
Stores & Supplies	25,961.70	0.9%	0.05	0.2%	0.0	0.0%
Telecommunications	202.82	0.8%	1.35	5.8%	1.5	2.2%
Trading	19,573.78	-0.7%	0.23	1.0%	0.2	0.3%
<b>Total</b>			<b>23.2</b>	<b>100.0%</b>	<b>68.7</b>	<b>100.0%</b>

**Table 3: Top 10 Securities by Turnover (US \$ Mn) for the week**

Security	Turnover (US \$ Mn)
JKH.N0000	15.8
TAP.N0000	13.1
COMB.N0000	5.8
LIOC.N0000	2.4
HNB.N0000	2.3
DIAL.N0000	1.5
SPEN.N0000	1.4
DIST.N0000	1.3
TJL.N0000	1.3
SAMP.N0000	1.2

**Table 4: Top 10 Securities by Price Return (%) for the week**

Security	This week VWAP (LKR)	Privious week WAAP (LKR)	Return (%)
CPRT.N0000	2,250.00	1,800.00	25.0%
ETWO.N0000	72.00	58.60	22.9%
PMB.N0000	25.10	22.80	10.1%
CFT.N0000	8.20	7.50	9.3%
LITE.N0000	7.90	7.30	8.2%
LIOCN0000	43.50	40.20	8.2%
CFI.N0000	103.50	95.70	8.2%
CHOT.N0000	26.80	25.00	7.2%
NHL.N0000	3.30	3.10	6.5%
UDPL.N0000	29.90	28.10	6.4%

**Table 5: Year-to-date Statistics**

	2015 (1 <sup>st</sup> Jan - 28 <sup>th</sup> Aug)	2014	2013
<b>Equity</b>			
Turnover (US \$ Mn)	1,366.3	2,594.9	1,553.5
Domestic (US \$ Mn)	959.5	1,878.5	993.7
Foreign (US \$ Mn)	406.8	716.4	559.8
Daily Average Turnover (US \$ Mn)	8.8	10.8	6.4
Market Capitalization (US \$ Bn)*	23.2	23.5	18.8
Turnover to Market Capitalization (%)**	8.4%	12.3%	8.7%
Market Capitalization as a % of GDP	31.9%***	31.7%***	28.4%
<b>Corporate Debt</b>			
Turnover (US \$ Mn)	27.9	54.3	17.3
Trades (No.)	157	401	173
Debentures Traded (No. 000)	33,731	56,909	19,999
<b>Government Debt</b>			
Turnover (US \$ Mn)	-	-	-
Trades (No.)	-	-	-
Debentures Traded (No. 000)	-	-	-
<b>Closed End Fund</b>			
Turnover (US \$ Mn)	0.3	1	0.3
Trades (No.)	456	940	883
Units Traded (No. 000)	425	1,680	640

\*As of last trading day

\*\* Calculated for 7 months and annualized

\*\*\* Based on 2014 Annual GDP(Provisional)

## Listed Company Announcements (During the week)

For Corporate Disclosures/ CSE Circulars / SEC Directives during the week, please visit: [www.cse.lk](http://www.cse.lk)

## Selected Economic Indicators

Table 6: Interest Rates

Item	Week Ending 2015 Aug 28	Week Ago	Year Ago
Commercial Bank Average Weighted Prime Lending Rate (AWPR)	6.76	6.89	7.25
Treasury Bill Yield (Excluding 10% withholding tax)			
- 91 days	6.53	6.36	6.19
- 182 days	6.87	6.66	6.28
- 364 days	6.97	6.72	6.30
Standing Deposit Facility	6.00	6.00	6.50
Standing Lending Facility	7.50	7.50	8.00
Call Money Weekly Average (CMR)	6.28	6.23	6.70
Sri Lanka Inter Bank Offer Rate ( SLIBOR )			
1 day	6.30	6.30	6.74
7 days	6.50	6.46	7.18
1 Month	6.75	6.66	7.43
3 Months	7.01	6.92	7.79
6 Months	7.26	7.20	7.95
12 Months	7.55	7.51	8.18
Commercial Banks	May 2015	Month Ago	Year Ago
Saving Deposits -	0.50-8.00	0.50-8.00	0.75-9.00
One Year Fixed Deposits -	3.50-15.00	3.95-15.00	5.45-14.50
	July 2015	Month Ago	Year Ago
Commercial Bank Average Weighted Deposit Rate (AWDR)	6.00	6.02	7.16
Commercial Bank Average Weighted Fixed Deposit Rate (AWFDR)	7.21	7.29	8.64
	June 2015	Month Ago	Year Ago
Commercial Bank Average Weighted Lending Rate (AWLR)	11.25	11.39	13.83
NSB	June 2015	Month Ago	Year Ago
Saving Deposits -	5.00	5.00	5.00
One Year Fixed Deposits -	6.50	6.50	7.50
Treasury Bonds Auction	(8 Years) 25/08/15	(9 Y 11 Months ) 25/08/15	(10 years) 04/08/15
Coupon rate	11.20	11.00	11.00
Weighted Average Yield (Excluding 10% withholding tax)	9.76	9.97	9.63

Source: Weekly Economic Indicators - Central Bank of Sri Lanka

Table 7: Price Indices

Item	July 2015	Month Ago	Year Ago
(2006 / 07 = 100)			
Colombo Consumers' Price Index (CCPI)	182.8	181.6	183.2
Annual Average Change %	1.3	1.7	4.7
Year - on - Year Change %	-0.2	0.1	3.6
Core Inflation - ( CCPI )	178.9	177.5	172.9
Annual Average Change %	2.8	2.8	3.1
Year - on - Year Change %	3.5	2.8	3.7

Table 8: GDP by Industrial Origin at Constant (2002) Prices - Growth Rates

Item	2015(a) 1 <sup>st</sup> Quarter	2014(a) 1 <sup>st</sup> Quarter	2014(a) Annual
Agriculture	2.9	-0.4	-2.2
Industry	-1.9	-3.4	1.2
Services	10.1	2.9	6.5
GDP	6.0	0.7	4.5

(a)Provisional

Source: Department of Census and Statistics

### **For more information & feedback:**

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