

ASPI ^v 2.58% | S&P SL20 ^v 4.31%

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KEY STATISTICS

| Week ending | 6-May | 29-Apr | +/- |
|--|----------|----------|---------|
| ASPI | 7,427.48 | 7,624.26 | -2.58% |
| S&P SL20 | 2,401.21 | 2,509.24 | -4.31% |
| Banks | 412.29 | 419.61 | -1.74% |
| Capital Goods | 1,035.36 | 1,071.66 | -3.39% |
| Food, Beverage & Tobacco | 746.26 | 768.35 | -2.87% |
| Consumer Durables & Apparel | 1,491.31 | 1,536.32 | -2.93% |
| Materials | 911.99 | 970.04 | -5.98% |
| Diversified Financials | 1,607.48 | 1,675.48 | -4.06% |
| Turnover (LKR Bn) | 2.86 | 8.72 | -67.22% |
| Foreign Buying (LKR Mn) | 420.97 | 330.54 | 27.36% |
| Foreign Selling (LKR Mn) | 101.35 | 177.67 | -42.96% |
| Daily Average Turnover (LKR Bn) | 0.95 | 1.74 | -45.36% |
| Daily Average Foreign Buying (LKR Mn) | 140.32 | 66.11 | 112.26% |
| Daily Average Foreign Selling (LKR Mn) | 33.78 | 35.53 | -4.93% |

| Company | Code | Opening Price | Closing Price | WoW % Change |
|-------------------|-------|---------------|---------------|--------------|
| LANKA IOC | LIOC | 25.2 | 32.5 | 29.0% |
| GESTETNER | GESTN | 60.2 | 74.1 | 23.1% |
| JETWING SYMPHONY | JETSN | 11.0 | 13.5 | 22.7% |
| CEYLINCO INS. | CINSN | 1,953.3 | 2,349.8 | 20.3% |
| BLUE DIAMONDS | BLUEN | 0.5 | 0.6 | 20.0% |
| LAUGFS POWER [NV] | LPLX | 7.1 | 8.2 | 15.5% |
| RAMBODA FALLS | RFL N | 14.4 | 16.5 | 14.6% |
| DILMAH CEYLON | CTEAN | 700.0 | 786.5 | 12.4% |
| LIGHTHOUSE HOTEL | LHL N | 24.5 | 27.0 | 10.2% |
| LAUGFS GAS [NV] | LGL X | 10.9 | 12.0 | 10.1% |

| Company | Code | Opening Price | Closing Price | WoW % Change |
|-------------------|-------|---------------|---------------|--------------|
| CITRUS LEISURE | REEFN | 5.3 | 4.0 | -24.5% |
| ORIENT FINANCE | ORINN | 12.0 | 9.2 | -23.3% |
| AUTODROME | AUTON | 115.0 | 90.0 | -21.7% |
| MILLENNIUM HOUSE | MHDLN | 3.7 | 2.9 | -21.6% |
| DOLPHIN HOTELS | STAFN | 27.7 | 22.1 | -20.2% |
| COOP INSURANCE | COOPN | 3.0 | 2.4 | -20.0% |
| PALM GARDEN HOTEL | PALMN | 34.5 | 27.7 | -19.7% |
| SIGIRIYA VILLAGE | SIGVN | 39.3 | 32.0 | -18.6% |
| LOLC FINANCE | LOFCN | 6.8 | 5.6 | -17.6% |
| CENTRAL IND. | CINDN | 67.6 | 55.7 | -17.6% |

Market Review

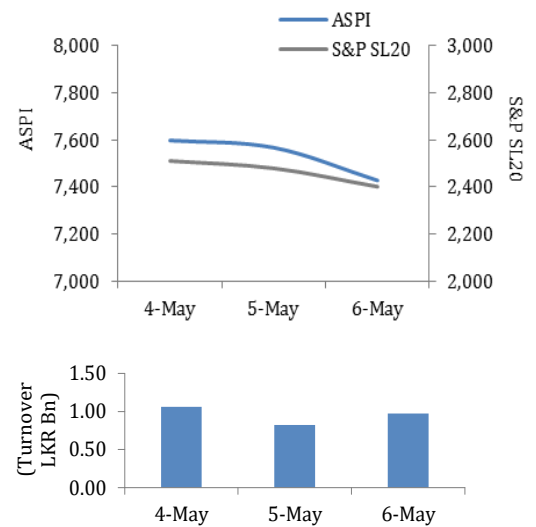
Indices |

The Bourse ended the week on a negative note this week with ASPI decreasing by 196.78 points (or 2.58%) to close at 7,427.48 points, while the S&P SL20 Index also decreased by 108.03 points (or 4.31%) to close at 2,401.21 points.

Turnover & Market Capitalization |

Expolanka was the highest contributor to the week's turnover value, contributing LKR 0.96Bn or 33.61% of total turnover value. LOLC Holdings followed suit, accounting for 7.69% of turnover (value of LKR 0.22Bn) while Lanka IOC contributed LKR 0.21Bn to account for 7.43% of the week's turnover. Total turnover value amounted to LKR 2.86 Bn (cf. last week's value of LKR 8.72 Bn), while daily average turnover value amounted to LKR 0.95 Bn (-45.36% W-o-W) compared to last week's average of LKR 1.74 Bn. Market capitalization meanwhile, decreased by 4.24% W-o-W (or LKR 136.83Bn) to LKR 3,089.60Bn cf. LKR 3,226.43Bn last week.

Indices vs. Turnover (29th Apr - 06th May)



Liquidity (Value & Volume) |

Transportation Industry Group was the highest contributor to the week's total turnover value, accounting for 33.62% (or LKR 0.96Bn) of market turnover. Industry Group's turnover was driven primarily by Expolanka which accounted for 99.99% of the sector's total turnover. Capital Goods Industry Group meanwhile accounted for 17.10% of the total turnover value while Diversified Financials Group contributed 12.29% to the weekly turnover.

The Diversified Financials Industry Group dominated the market in terms of share volume, accounting for 45.41% (or 73.42 Mn shares) of total volume, with a value contribution of LKR 0.35Bn. The Food Beverage & Tobacco Industry Group followed suit, adding 18.58% to total volume (30.04 Mn shares) while the Capital Goods Group contributed 8.01% (12.95 Mn shares) to the weekly share volume.

Net Foreign Position |

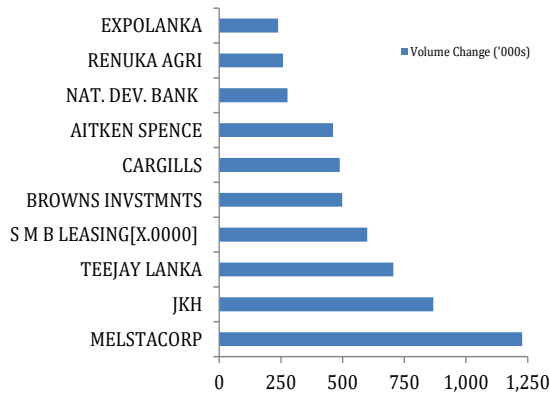
Foreign investors were net buyers this week with total net inflow amounting to LKR 0.32 Bn relative to last week's total net inflow of LKR 0.15 Bn (109.1% W-o-W). Total foreign purchases increased by 27.4% W-o-W to LKR 0.42Bn from last week's value of LKR 0.33Bn, while total foreign sales amounted to LKR 0.1Bn relative to LKR 0.18Bn recorded last week (-43% W-o-W).

TOP 10 TURNOVERS

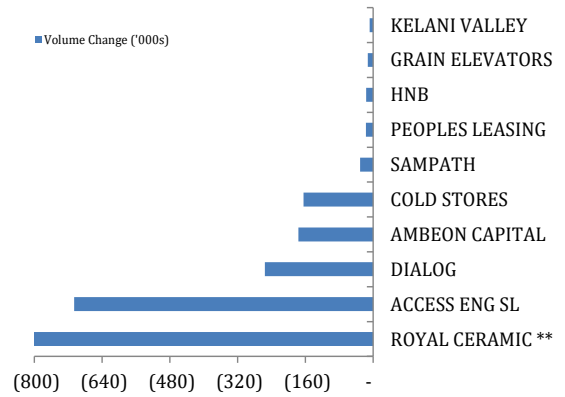
| Company | Code | Industry Group | Opening Price | Closing Price | Value (Rs. Mn) | Contribution to Total Turnover |
|------------------|-------|----------------------------|---------------|---------------|----------------|--------------------------------|
| EXPOLANKA | EXPON | TRANSPORTATION | 169.5 | 148.5 | 961.4 | 33.61% |
| L O L C HOLDINGS | LOLCN | DIVERSIFIED FINANCIALS | 437.5 | 415.5 | 219.9 | 7.69% |
| LANKA IOC | LIOCN | ENERGY | 25.2 | 32.5 | 212.6 | 7.43% |
| BROWNS INVSTMNTS | BIL N | FOOD BEVERAGE AND TOBACCO | 6.1 | 5.3 | 121.6 | 4.25% |
| JKH | JKH N | CAPITAL GOODS | 123.0 | 124.0 | 117.3 | 4.10% |
| ROYAL CERAMIC | RCL N | CAPITAL GOODS | 31.5 | 28.2 | 115.2 | 4.03% |
| AITKEN SPENCE | SPENN | CAPITAL GOODS | 69.1 | 68.0 | 91.3 | 3.19% |
| CARGILLS | CARGN | FOOD AND STAPLES RETAILING | 160.0 | 168.3 | 82.3 | 2.88% |
| LOLC FINANCE | LOFCN | DIVERSIFIED FINANCIALS | 6.8 | 5.6 | 74.1 | 2.59% |
| MELSTACORP | MELSN | FOOD BEVERAGE AND TOBACCO | 37.5 | 37.0 | 55.4 | 1.94% |

Market Review (Cont'd)

Net Foreign Purchases (29 April - 06 May)*



Net Foreign Sales (29 April - 06 May)*



**Volume Change of Royal Ceramic (1.32Mn shares) from 29th Apr - 06th May not displayed.

Net Foreign Purchases (By Transaction Value)

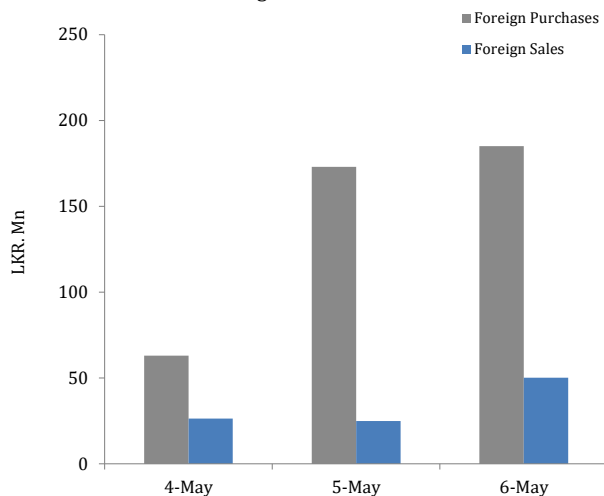
| Company | Net Change (Volume)* | Value (LKR. Mn) |
|------------------|----------------------|-----------------|
| JKH | 867,184 | 111.44 |
| CARGILLS | 488,645 | 82.21 |
| MELSTACORP | 1,227,402 | 45.41 |
| EXPOLANKA | 238,418 | 36.36 |
| AITKEN SPENCE | 461,119 | 31.33 |
| TEEJAY LANKA | 705,938 | 27.11 |
| NAT. DEV. BANK | 276,088 | 12.61 |
| L O L C HOLDINGS | 24,146 | 11.02 |
| SUNSHINE HOLDING | 208,412 | 6.77 |
| BROWNS INVSTMNTS | 498,719 | 2.56 |

Net Foreign Sales (By Transaction Value)

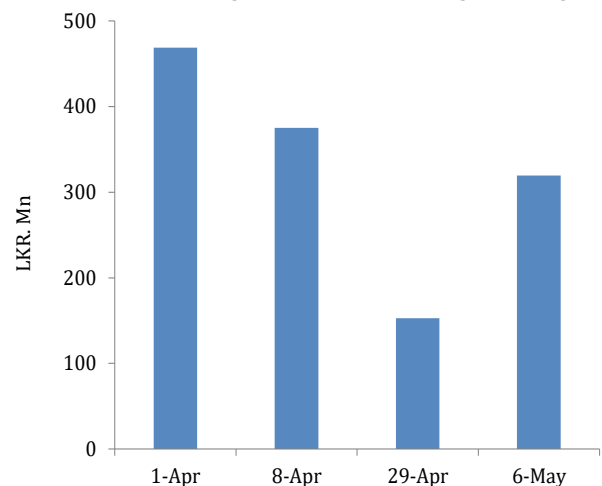
| Company | Net Change (Volume)* | Value (LKR. Mn) |
|-----------------|----------------------|-----------------|
| ROYAL CERAMIC | (1,323,413) | (37.5) |
| ACCESS ENG SL | (705,917) | (8.4) |
| COLD STORES | (164,057) | (4.6) |
| DIALOG | (255,522) | (2.3) |
| HNB | (16,051) | (1.4) |
| SAMPATH | (30,369) | (1.1) |
| AMBEON CAPITAL | (176,612) | (0.9) |
| GRAIN ELEVATORS | (12,357) | (0.8) |
| KELANI VALLEY | (8,090) | (0.4) |
| LANKA WALLTILE | (5,835) | (0.3) |

Note: *Volume based on closing price and not on actual traded price
Please note that the foreign shares data displayed above include private transfers done outside of the market.

Foreign Purchases Vs. Sales



Week Ending Net Position of Foreign Holdings



DIVIDEND ANNOUNCEMENTS

| Company | DPS (Rs.) | Final/Interim | XD From |
|-------------------------------|------------------|----------------------|----------------|
| DILMAH CEYLON TEA COMPANY PLC | 25.00 | Second interim | 13-May-2022 |
| UNION CHEMICALS LANKA PLC | 10.00 | Final dividend | 13-Jun-2022 |
| HARISCHANDRA MILLS PLC | 25.00 | First dividend | 13-May-2022 |
| SANASA DEVELOPMENT BANK PLC | 1.50 | First dividend | 31-May-2022 |

Crossings for the Week

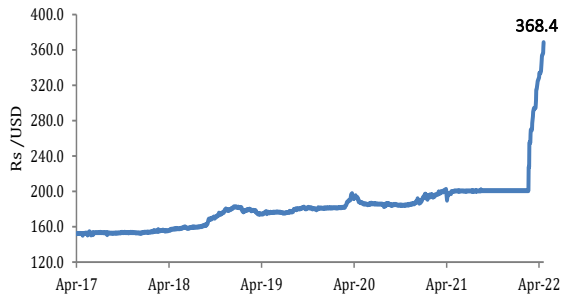
| Company | Code | Quantity | Turnover (Rs. Mn) | % of Total Crossings |
|----------------|-------------|-----------------|--------------------------|-----------------------------|
| CARGILLS | CARGN | 513,841 | 82.21 | 73.5% |
| MELSTACORP | MELSN | 800,000 | 29.60 | 26.5% |

Economic Snapshot

| | Apr'21 | May'21 | Jun'21 | Jul'21 | Aug'21 | Sep'21 | Oct'21 | Nov'21 | Dec'21 | Jan'22 | Feb'22 | Mar'22 | Apr'22 |
|---|-------------|-------------|-------------|-------------|-------------|--------------|------------|------------|-------------|-------------|-------------|-------------|-------------|
| Interest Rates | | | | | | | | | | | | | |
| Prime Lending Rate | 5.65 | 5.69 | 5.67 | 5.70 | 5.85 | 6.39 | 7.18 | 7.89 | 8.33 | 8.42 | 8.95 | 9.47 | 13.02 |
| Ave. Wtd. Deposit Rates | 5.07 | 4.97 | 4.87 | 4.77 | 4.75 | 4.75 | 4.79 | 4.82 | 4.94 | 5.01 | 5.07 | 5.17 | 5.52 |
| Ave. Wtd. Fixed Dep. Rates | 6.09 | 5.94 | 5.82 | 5.67 | 5.62 | 5.64 | 5.70 | 5.75 | 5.94 | 6.05 | 6.15 | 6.30 | 6.84 |
| CCPI Inflation Y-o-Y % (Base 2013) | 3.9 | 4.5 | 5.2 | 5.7 | 6.0 | 5.7 | 7.6 | 9.9 | 12.1 | 14.2 | 15.1 | 18.7 | 29.8 |
| GDP Growth (Base 2010) | | | | | | | | | | | | | |
| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | | | | | | | |
| | 5.0% | 4.5% | 3.6% | 3.3% | 2.3% | -3.6% | | | | | | | |

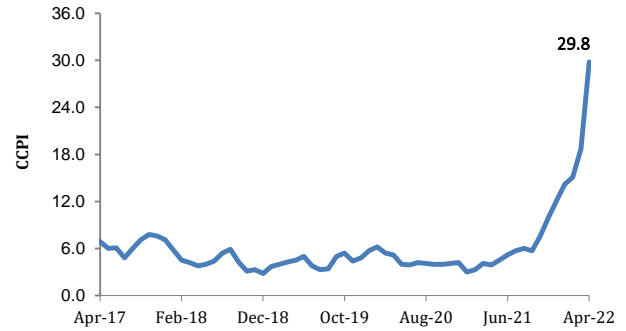
Source Central Bank

Exchange Rate, Rs. vs. US\$



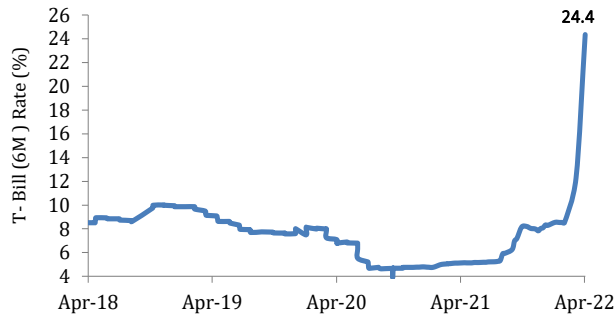
Source: Central Bank

Inflation (CCPI-N) YoY%



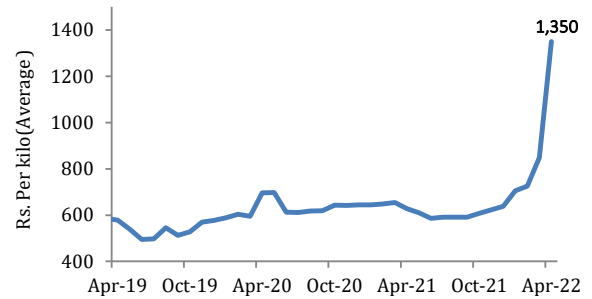
Source: Central Bank

6 Month T-Bill Yield



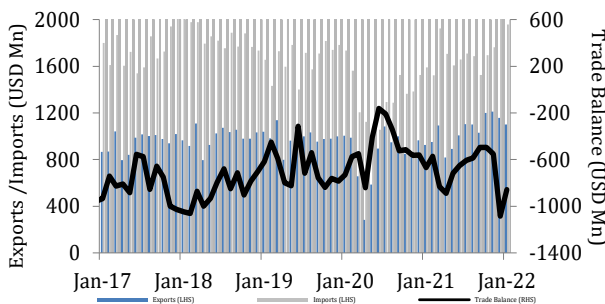
Source: Central Bank

Tea Prices



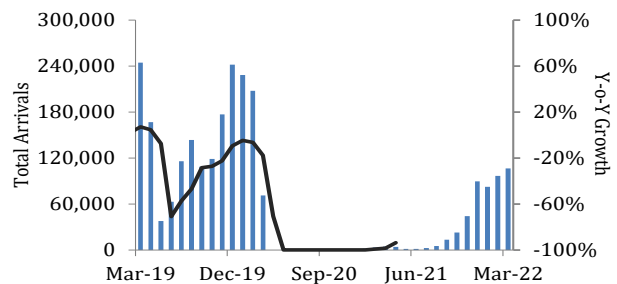
Source: Sri Lanka Tea Board

Export & Trade Balance



Source: Central Bank

Trends in Tourist Arrivals



Source: Sri Lanka Tourism Development Authority

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