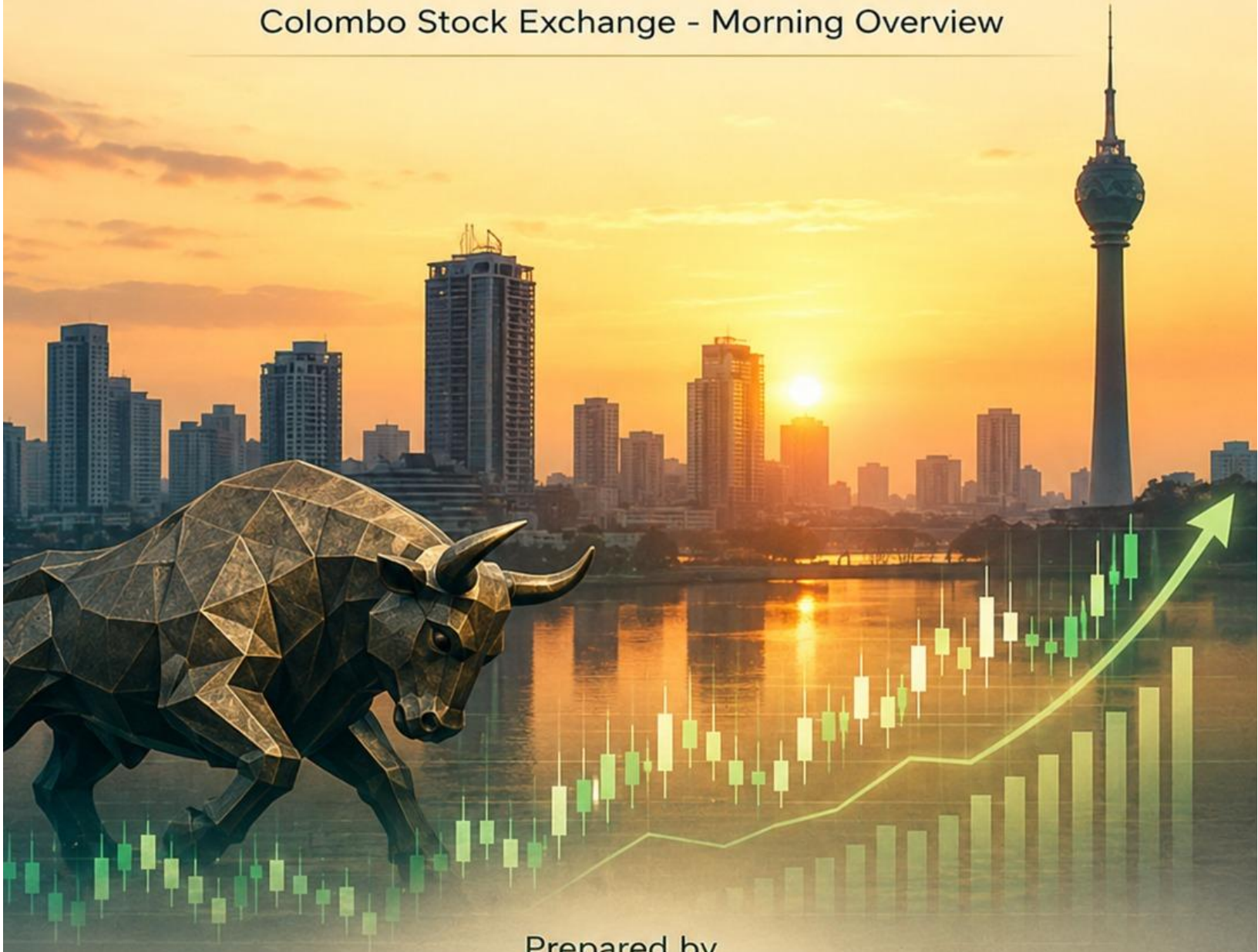
SenFin
SECURITIES

MORNING MARKET SUMMARY

Colombo Stock Exchange - Morning Overview



Prepared by
Senfin Research

MORNING SUMMARY

"The first rule of investment is don't lose. And the second rule is don't forget the first rule."
Warren Buffett

Thursday, November 19, 2026

Equity Update

		Chg	Chg%	18-Nov
ASPI	▼	-298.31	-1.37%	21,403
S&P SL 20 Index	▼	-87.5	-1.41%	6,097
Total Turnover (LKR)	▼			1,932,726,571
Market Capitalization (LKR)	▼			7,723,044,370,733
PER (x)				11.0
PBV (x)				1.3
DY (%)				3.1

Source: CSE

Global Indices

			18-Nov
Developed Markets			
Dow Jones	▼		50,198
Euro Stoxx 50	▼		6,154
FTSE 100	▼		10,551
Nikkei 225	▲		59,018
Hang Seng	▼		22,888
Frontier Markets			
VN index	▼		1,687
KSE-100	▼		176,294
DSEX	▲		5,501

Source: Bloomberg

Exchange Rates

(LKR per unit)		TT Buying	TT Selling	18-Nov
USD	$	328.3	337.2	
GBP	£	432.1	446.6	
EUR	€	359.1	372.3	
JPY	¥	2.1	2.1	
CNY		48.7	51.2	
INR	₹	3.6	3.7	

Source: CBSL

Commodities

Type			18-Nov
Gold (USD/t.oz)	▼		3,747
Gold (LKR/t.oz)	▼		1,265,544
Brent Crude Oil (USD/Bbl)	▼		92
Copper (USD/Lbs)	▼		577
Cotton (USD/Lbs)	▼		75
Aluminium (USD/MT)	▼		2,823
Palm Oil 3M forward (MYR/M	▼		4,386

Source: Bloomberg, CBSL

Policy Rates		
	OPR: 8.75%	**SRR:** 2.00%

Economic Indicators	Real GDP Growth:	NCPI YoY Change:	CCPI YoY Change:
	2026 Q2 = 4.2%	**September 2026** = 8.1%	**October 2026**= 8.3%

Source: CBSL

DIVIDEND ANNOUNCEMENTS

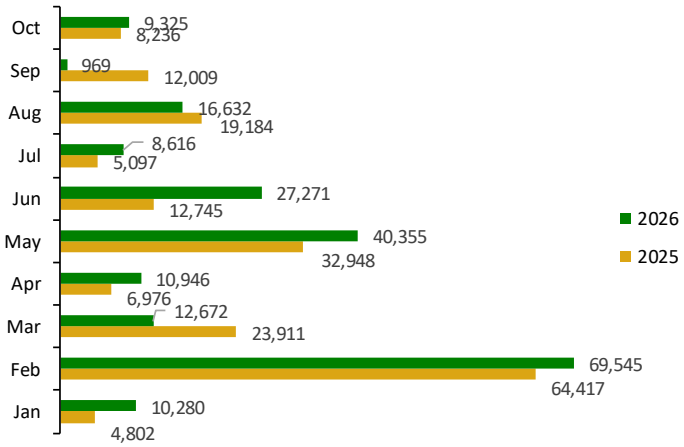
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Thursday, November 19, 2026

Cash Dividends

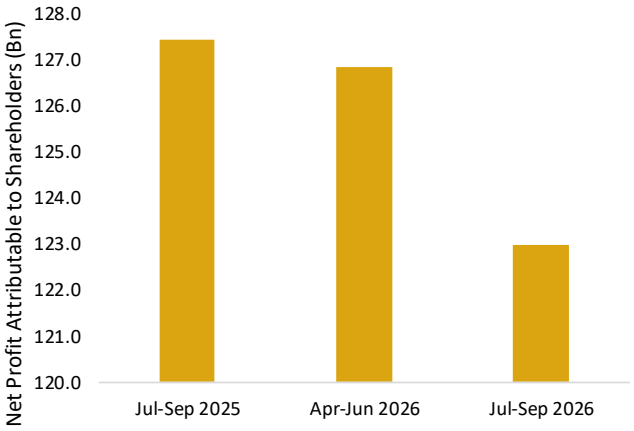
Company	Dividend Per Share	Final/Interim	XD Date	Record Date	Date of Payment
TAFL(N)	LKR 35.00	Other	19-Nov	20-Nov	9-Dec
ASIY(N)	LKR 0.23	First	19-Nov	20-Nov	9-Dec
GRAN(N)	LKR 10.00	Other	19-Nov	20-Nov	9-Dec
DIAL(N)	LKR 0.70	Third	20-Nov	23-Nov	10-Dec
CTC(N)	LKR 41.00	Third	23-Nov	25-Nov	11-Dec
SLTL(N)	LKR 0.50	First	25-Nov	26-Nov	14-Dec

LKR 229,434 Mn as dividends from January - November* 2026



**Until November 18, 2026*

Cumulative Net Profit decreased by 3% QoQ, decreased by 3% YoY



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Source: CSE