



**2026**

**MARCH**

# 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

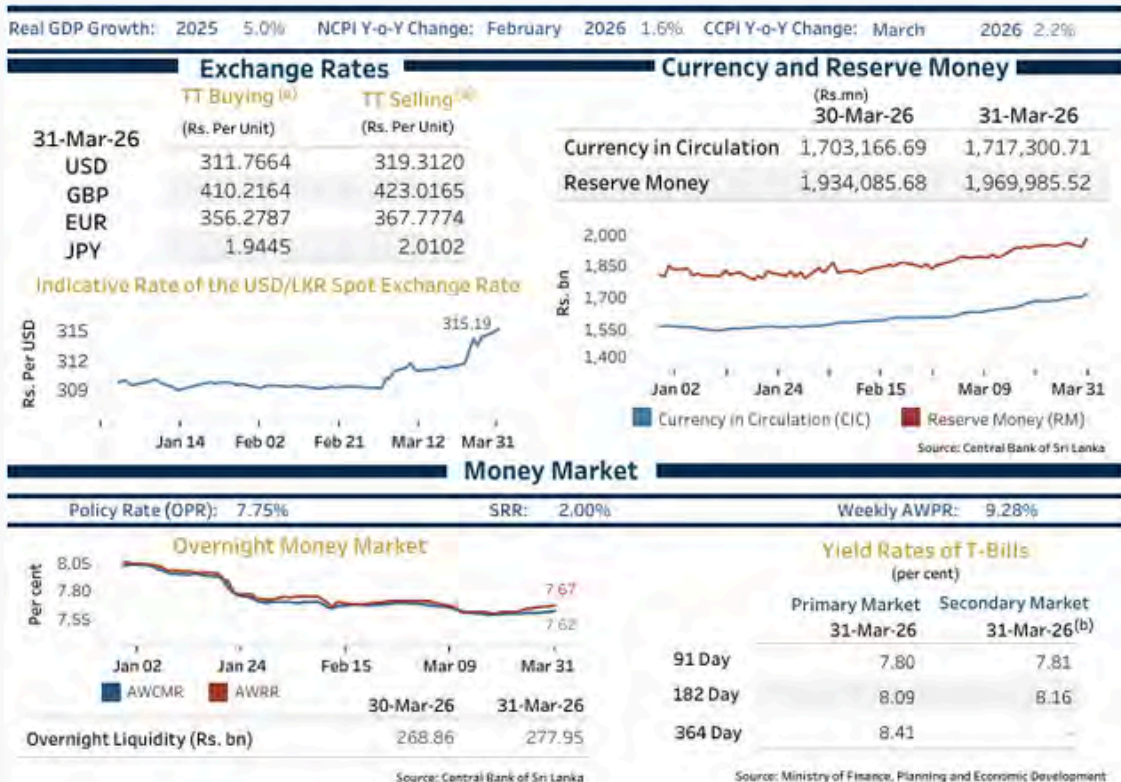
To analyze the current economic situation, the main macroeconomic indicators are used: inflation rate, exchange rate, policy interest rate, and Statutory Reserve Ratio (SRR). These indicators provide a comprehensive view of price stability, currency performance, monetary policy stance, and liquidity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

**General Inflation**  
**2.2%**

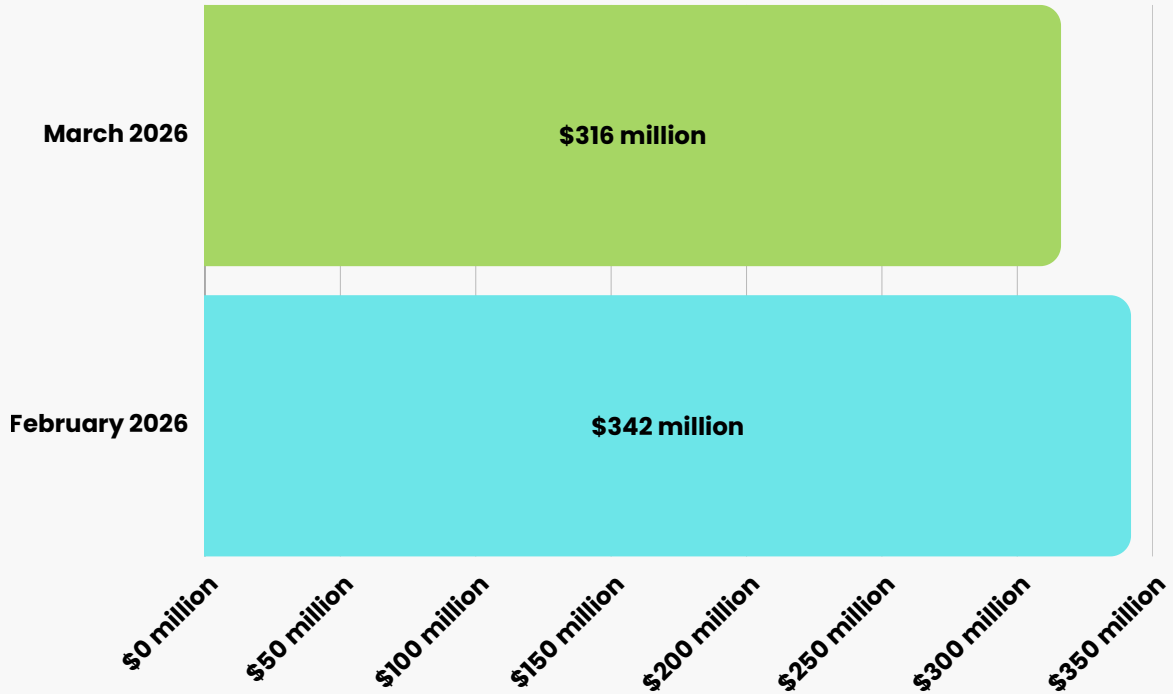
**Policy Interest Rate and SRR**  
**7.75**

**Exchange Rate LKR to USD**  
**315.30**

As at 31 March 2026



# MARKET TURNOVER



## MARKET TURNOVER HIGHLIGHTS



Revenue (\$ Mn)

**316.15**



Domestic Turnover (\$ Mn)

**303.99**



Foreign Turnover (\$ Mn)

**12.17**

**Companies  
Listed**

**289**

**Market Performance  
(2025)**

**41.89%**

# TURNOVER

	Mar 2026	Feb 2026	Jan 2026	Dec 2025	Nov 2025	Oct 2025	Sep 2025
Total Turnover (\$ Mn)	316.15	341.44	431.27	254.91	314.06	521.46	493.40
Domestic Turnover (\$ Mn)	303.99	296.18	407.76	245.89	298.26	493.40	451.51
Foreign Turnover (\$ Mn)	12.17	45.26	23.51	9.02	15.80	28.07	41.89
Daily Average Turnover (\$ Mn)	15.05	17.97	21.56	12.14	16.53	24.83	23.49
Crossings TO/Total TO (%)	18.53%	27.39%	22.11%	16.78%	16.59%	25.96%	20.53%
<b>Market Liquidity (Equity)</b>							
Share Volume (Mn)	4.66	4.33	3.94	2.47	3.02	6.67	5.17
No. of Trades (No.'000)	844.42	743.93	884.93	657.55	693.45	877.36	852.38
Daily Average Trades (No.)	40,210	39,154	44,246	31,312	36,498	41,779	40,590
<b>Market Size (Equity)</b>							
Market Capitalization (\$ Bn)	24.06	26.95	27.19	26.76	26.94	26.94	25.71
<b>Market Multiples</b>							
Market P/E (x)	10.64	11.66	11.30	10.73	11.16	10.06	9.59
Market P/BV (x)	1.31	1.50	1.52	1.45	1.50	1.50	1.43
Dividend Yield (%)	3.07	2.62	2.49	2.62	2.37	2.36	2.47
Companies Listed (@ EOY)	289	289	289	288	285	284	286
<b>Trading Period</b>							
No. of Market Days	21	19	20	21	19	21	21

# CONTRIBUTION TO TURNOVER

	2026	2025	2024	2023	2022	2021	2020
Foreign Companies (%)	6.44%	4.84%	8.72%	8.29%	6.60%	4.32%	19.03%
Foreign Individuals (%)	0.99%	1.34%	1.19%	1.27%	1.00%	0.83%	0.77%
Total Foreign Contribution (%)	7.43%	6.19%	9.90%	9.56%	7.60%	5.14%	19.80%
Domestic Companies (%)	44.65%	44.49%	44.85%	44.65%	37.67%	37.69%	32.21%
Domestic Individuals (%)	47.92%	49.32%	45.24%	45.79%	54.73%	57.16%	48.02%
Total Domestic Contribution (%)	92.57%	93.82%	90.10%	90.44%	92.40%	94.86%	80.23%

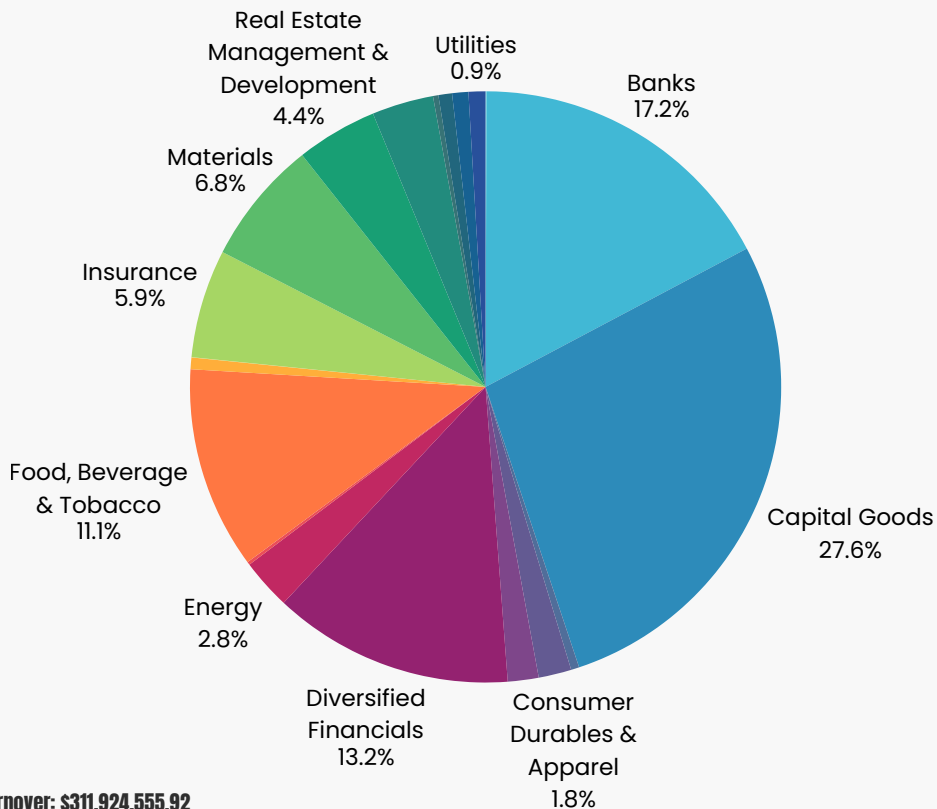
# FOREIGN TRADING ACTIVITIES

	2026	2025	2024	2023	2022	2021	2020
<b>Primary Market</b>							
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
<b>Secondary Market</b>							
Foreign Purchases (\$ Mn)	49.29	188.83	155.74	120.67	239.51	176.33	287.51
Foreign sales (\$ Mn)	112.60	316.95	189.73	107.97	130.83	449.24	566.69
Net Foreign Flow (\$ Mn)	-63.31	-128.12	-33.99	12.70	108.69	-272.91	-279.18
Total Net foreign Flow (\$ Mn)	-63.31	-127.09	66.52	17.97	181.54	-245.32	-229.08

# SECTOR WISE TURNOVER

As at 31 March 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



March Market Turnover: \$311,924,555.92

# SECTOR WISE PERFORMANCE

SECTOR	TURNOVER (FEBRUARY)	TURNOVER (MARCH)	PERFORMANCE (MARCH)
Turnover = \$311,924,555.92			
Automobiles & Components	0.02%	0.05%	0.02%
Banks	20.42%	17.19%	-3.22%
Capital Goods	22.79%	27.62%	4.83%
Commercial & Professional Services	1.53%	0.44%	-1.08%
Consumer Durables & Apparel	3.68%	1.79%	-1.89%
Consumer Services	1.91%	1.68%	-0.22%
Diversified Financials	11.85%	13.16%	1.30%
Energy	0.65%	2.76%	2.10%
Food & Staples Retailing	0.61%	0.16%	-0.45%
Food, Beverage & Tobacco	10.44%	11.05%	0.61%
Health Care Equipment & Services	1.03%	0.63%	-0.39%
Household & Personal Products	0.02%	0.01%	-0.004%
Insurance	5.17%	5.93%	0.75%
Materials	8.59%	6.80%	-1.78%
Real Estate Management & Development	4.31%	4.43%	0.12%
Retailing	3.14%	3.36%	0.22%
Software & Services	0.32%	0.29%	-0.02%
Telecommunication Services	2.05%	0.74%	-1.31%
Transportation	0.60%	0.88%	0.27%
Utilities	0.78%	0.92%	0.14%

# INDEX PERFORMANCE

	2026	2025	2024	2023	2022	2021	2020
All Share Price Index	21,066.18	22,624.31	15,944.61	10,654.16	8,489.66	12,226.01	6,774.22
Return (%)	-6.89% ↓	41.89% ↑	49.66% ↑	25.50% ↑	-30.56% ↓	80.48% ↑	10.52% ↑
S&P SL 20 Index	5,904.10	6,157.38	4,862.10	3,068.36	2,635.63	4,233.25	2,638.10
Return (%)	-4.11% ↓	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

# 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
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Net Foreign Flow (\$ Mn)	-63.31	-128.12	-33.99	12.70	108.69	-272.91	-279.18
Total Net foreign Flow (\$ Mn)	-63.31	-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	21,066.18	22,624.31	15,944.61	10,654.16	8,489.66	12,226.01	6,774.22
Return (%)	-6.89% ↓	41.89% ↑	49.66% ↑	25.50% ↑	-30.56% ↓	80.48% ↑	10.52% ↑
S&P SL 20 Index	5,904.10	6,157.38	4,862.10	3,068.36	2,635.63	4,233.25	2,638.10
Return (%)	-4.11% ↓	26.64% ↑	58.46% ↑	16.42% ↑	-37.74% ↓	60.47% ↑	-10.18% ↓
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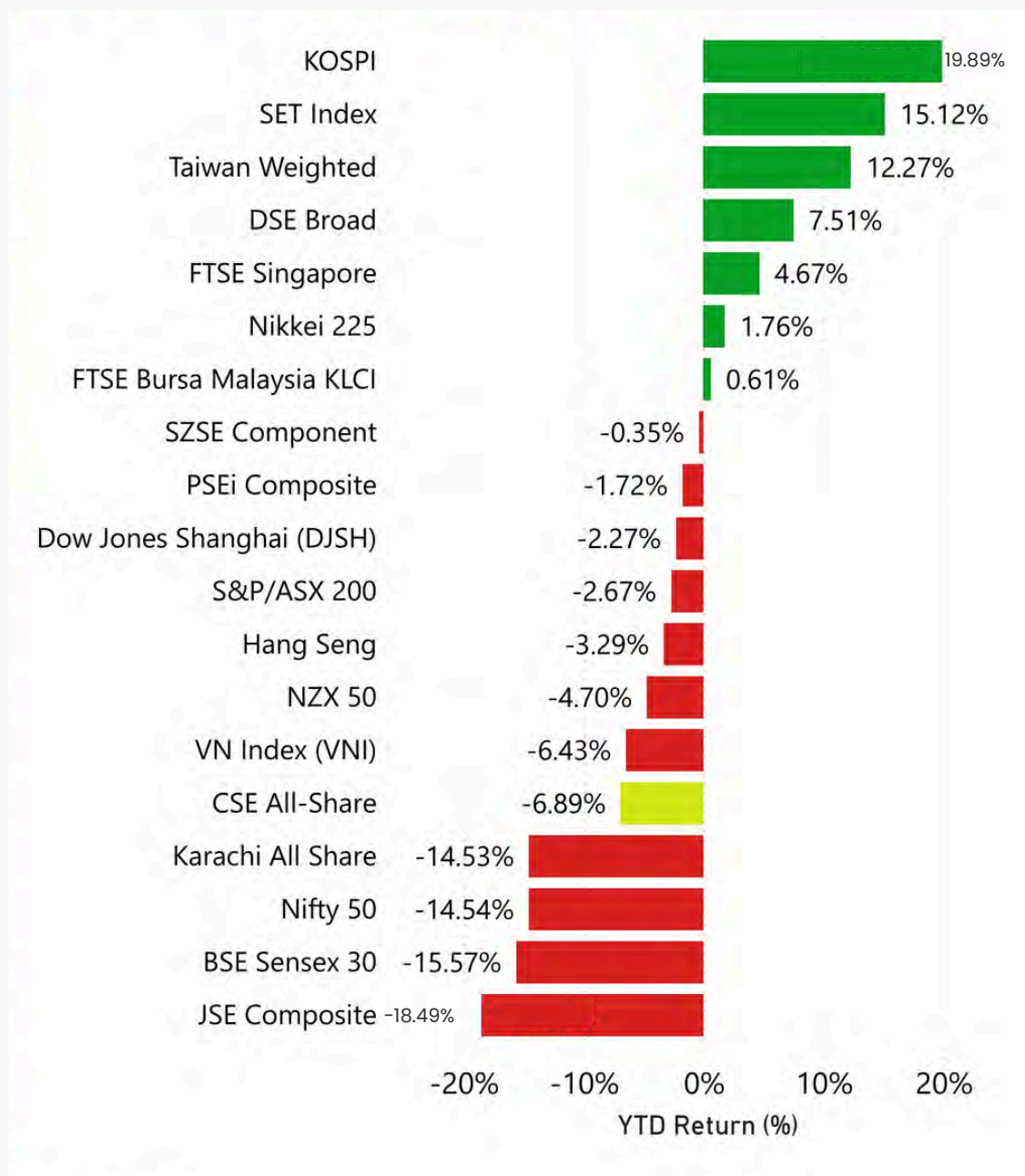
# REGIONAL MARKET PERFORMANCE 2026

(Data for the month ended 31 March 2026)

Country	Index	YTD Return
South Korea	KOSPI	19.89%
Thailand	SET Index	15.12%
Taiwan	Taiwan Weighted	12.27%
Bangladesh	DSE Broad	7.51%
Singapore	FTSE Singapore	4.67%
Japan	Nikkei 225	1.76%
Malaysia	FTSE Bursa Malaysia KLCI	0.61%
China	SZSE Component	-0.35%
Philippines	PSEi Composite	-1.72%
China	Dow Jones Shanghai (DJSH)	-2.27%
Australia	S&P/ASX 200	-2.67%
Hong Kong	Hang Seng	-3.29%
New Zealand	NZX 50	-4.70%
Vietnam	VN Index (VNI)	-6.43%
Sri Lanka	CSE All-Share	-6.89%
Pakistan	Karachi All Share	-14.53%
India	Nifty 50	-14.54%
India	BSE Sensex 30	-15.57%
Indonesia	JSE Composite	-18.49%

# MARKET PERFORMANCE BY YTD RETURN

(Data for the month ended 31 March 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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