



**2026**

**FEBRUARY**

# 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.

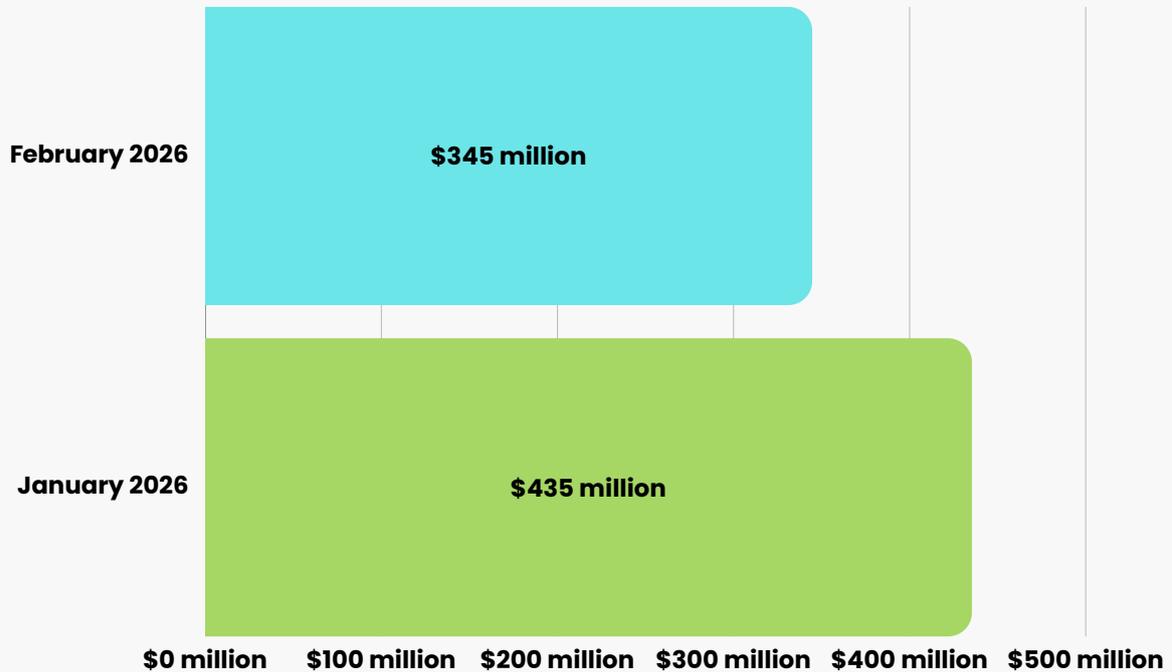
**Clearing & Settlement:** Through its fully owned subsidiary, the Central Depository Systems (Pvt.) Ltd. (CDS), the CSE facilitates clearing, settlement, and safekeeping of securities.

**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



# MARKET TURNOVER



# MARKET TURNOVER HIGHLIGHTS

-  Revenue (\$ Mn)  
**344.68**
-  Domestic Turnover (\$ Mn)  
**298.99**
-  Foreign Turnover (\$ Mn)  
**45.69**

<b>Companies Listed</b>	<b>Market Performance (2025)</b>
<b>289</b>	<b>41.89%</b>

# TURNOVER

	Feb 2026	Jan 2026	Dec 2025	Nov 2025	Oct 2025	Sep 2025	Aug 2025	Jul 2025
Total Turnover (\$ Mn)	344.68	435.36	254.91	314.06	521.46	493.40	437.49	81.97
Domestic Turnover (\$ Mn)	298.99	411.63	245.89	298.26	493.40	451.51	415.42	79.75
Foreign Turnover (\$ Mn)	45.69	23.74	9.02	15.80	28.07	41.89	22.07	2.22
Daily Average Turnover (\$ Mn)	18.14	21.77	12.14	16.53	24.83	23.49	21.87	20.49
Crossings TO/Total TO (%)	27.39%	22.11%	16.78%	16.59%	25.96%	20.53%	19.40%	24.16%
Market Liquidity (Equity)								
Share Volume (Mn)	4.33	3.94	2.47	3.02	6.67	5.17	4.78	0.77
No. of Trades (No.'000)	743.93	884.93	657.55	693.45	877.36	852.38	808.20	140.53
Daily Average Trades (No.)	39,154	44,246	31,312	36,498	41,779	40,590	40,410	35,133
Market Size (Equity)								
Market Capitalization (\$ Bn)	27.21	27.45	26.76	26.94	26.94	25.71	24.63	22.87
Market Multiples								
Market P/E (x)	11.66	11.30	10.73	11.16	10.06	9.59	9.81	9.14
Market P/BV (x)	1.50	1.52	1.45	1.50	1.50	1.43	1.41	1.31
Dividend Yield (%)	2.62	2.49	2.62	2.37	2.36	2.47	2.30	2.52
Companies Listed (@ EOY)	289	289	288	285	284	286	286	286
Trading Period								
No. of Market Days	19	20	21	19	21	21	20	4

# CONTRIBUTION TO TURNOVER

	2026	2025	2024	2023	2022	2021	2020
Foreign Companies (%)	7.75%	4.84%	8.72%	8.29%	6.60%	4.32%	19.03%
Foreign Individuals (%)	1.15%	1.34%	1.19%	1.27%	1.00%	0.83%	0.77%
Total Foreign Contribution (%)	8.90%	6.19%	9.90%	9.56%	7.60%	5.14%	19.80%
Domestic Companies (%)	44.51%	44.49%	44.85%	44.65%	37.67%	37.69%	32.21%
Domestic Individuals (%)	46.60%	49.32%	45.24%	45.79%	54.73%	57.16%	48.02%
Total Domestic Contribution (%)	91.11%	93.82%	90.10%	90.44%	92.40%	94.86%	80.23%

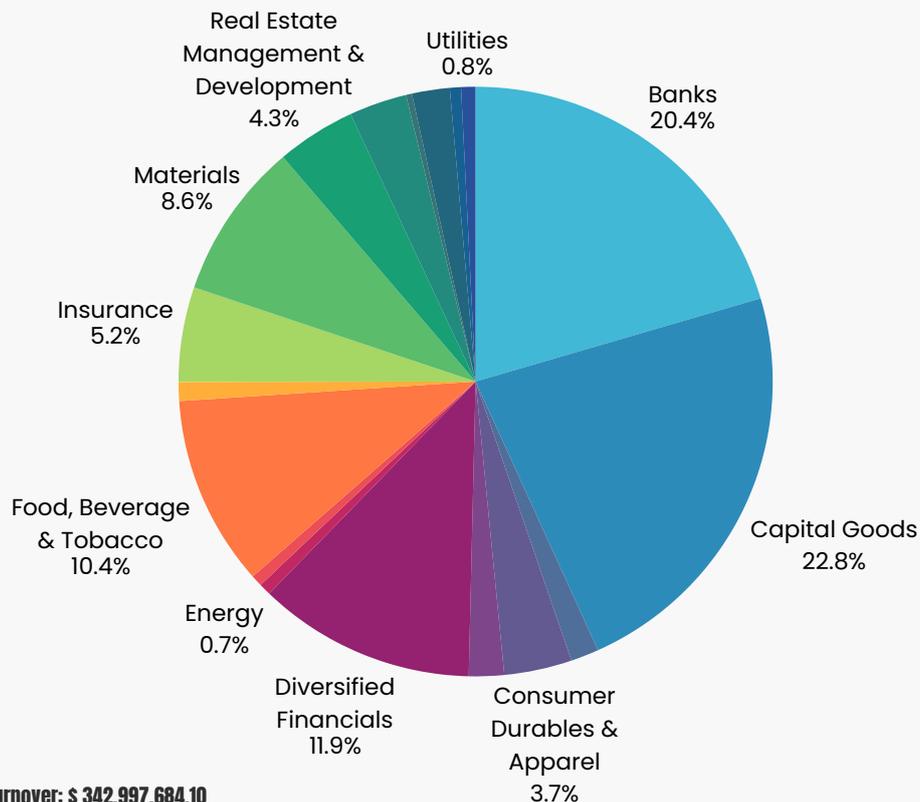
# FOREIGN TRADING ACTIVITIES

	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)	43.35	188.83	155.74	120.67	239.51	176.33	287.51
Foreign sales (\$ Mn)	95.51	316.95	189.73	107.97	130.83	449.24	566.69
Net Foreign Flow (\$ Mn)	-52.17	-128.12	-33.99	12.70	108.69	-272.91	-279.18
Total Net foreign Flow (\$ Mn)	-52.17	-127.09	66.52	17.97	181.54	-245.32	-229.08

# SECTOR WISE TURNOVER

As at 27 February 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



February Market Turnover: \$ 342,997,684.10

# SECTOR WISE PERFORMANCE

SECTOR	PERFORMANCE (AGAINST JANUARY)
Automobiles & Components	-1.00%
Banks	0.79%
Capital Goods	-1.26%
Commercial & Professional Services	30.10%
Consumer Durables & Apparel	1.68%
Consumer Services	-1.29%
Diversified Financials	-2.61%
Energy	-2.93%
Food & Staples Retailing	-2.10%
Food, Beverage & Tobacco	-1.52%
Health Care Equipment & Services	3.81%
Household & Personal Products	-5.67%
Insurance	3.20%
Materials	-1.88%
Real Estate Management & Development	11.31%
Retailing	-7.59%
Software & Services	-2.08%
Telecommunication Services	2.27%
Transportation	-4.59%
Utilities	2.61%

# INDEX PERFORMANCE

	Feb 2026	Jan 2026	Dec 2025	Nov 2025	Oct 2025	Sep 2025	Aug 2025	Jul 2025
All Share Price Index	23,734.06	23,812.31	22,624.31	22,712.82	22,804.84	21,778.60	20,997.36	19,642.48
ASPI MTD Return	-0.33%	5.25%	-0.39%	-0.40%	4.71%	3.72%	6.90%	8.96%
ASPI YTD Return (%)	4.91% ↑	5.25% ↑	41.89% ↑	42.45% ↑	43.03... ↑	36.59... ↑	31.69% ↑	23.19... ↑
S&P SL20 Index	6,635.97	6,641.15	6,157.38	6,267.03	6,213.91	6,126.53	6,076.79	5,762.17
S&PSL20 MTD Return	-0.08%	7.86%	-1.75%	0.85%	1.43%	0.82%	5.46%	7.65%
S&P SL20 YTD Return (%)	7.77% ↑	7.86% ↑	26.64% ↑	28.90% ↑	27.80... ↑	26.01... ↑	24.98% ↑	18.51... ↑

## FOREIGN TRADING ACTIVITY

	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)	43.35	188.83	155.74	120.67	239.51	176.33	287.51
Foreign sales (\$ Mn)	95.51	316.95	189.73	107.97	130.83	449.24	566.69
Net Foreign Flow (\$ Mn)	-52.17	-128.12	-33.99	12.70	108.69	-272.91	-279.18
Total Net foreign Flow (\$ Mn)	-52.17	-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	23,734.06	22,624.31	15,944.61	10,654.16	8,489.66	12,226.01	6,774.22
Return (%)	4.91% ↑	41.89% ↑	49.66% ↑	25.50% ↑	-30.56% ↓	80.48% ↑	10.52% ↑
S&P SL 20 Index	6,635.97	6,157.38	4,862.10	3,068.36	2,635.63	4,233.25	2,638.10
Return (%)	7.77% ↑	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	22,864.08	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	6,186.09	4,264.84	2,896.48	2,420.73	2,125.96	2,687.45	1,685.45

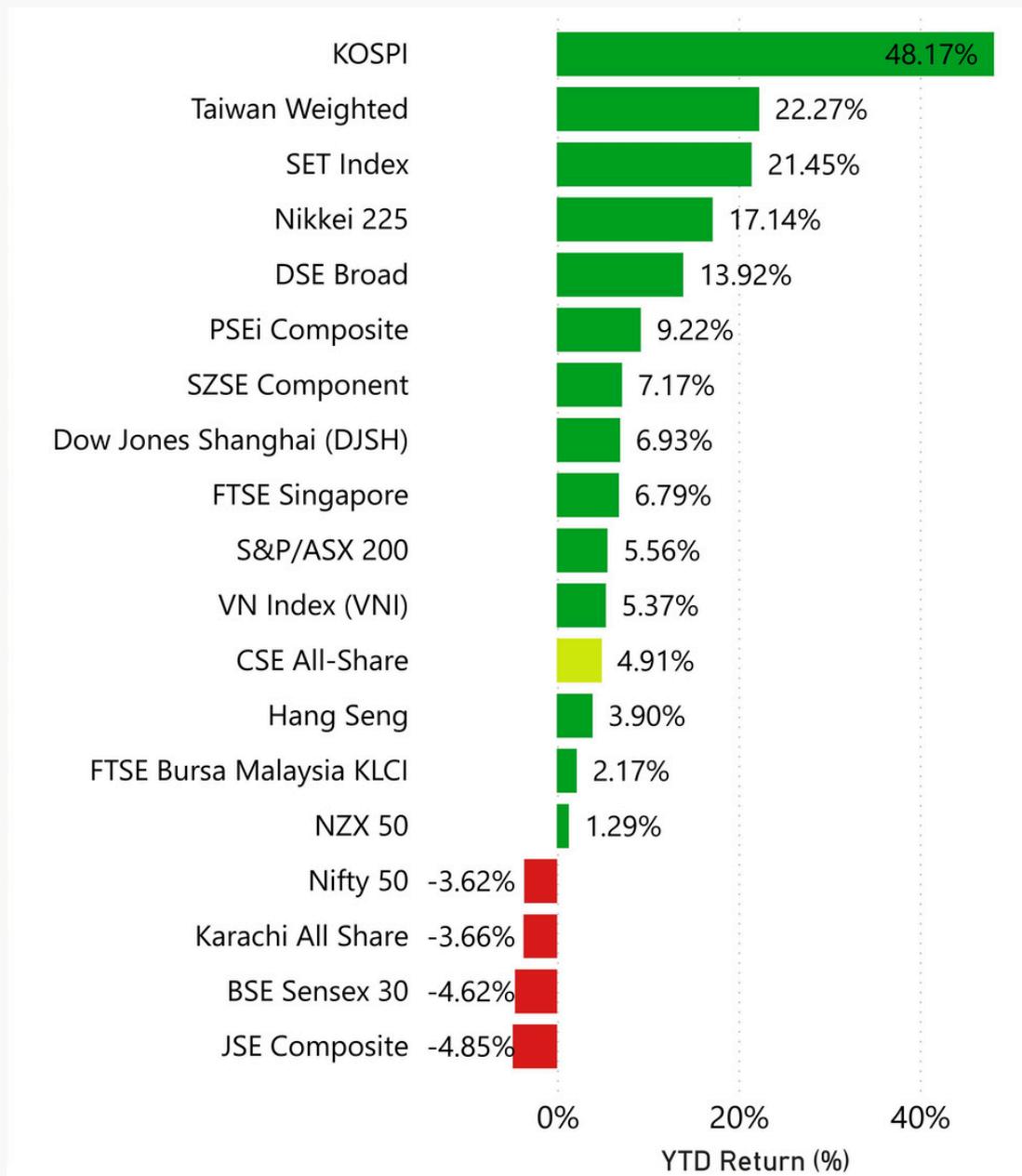
# REGIONAL MARKET PERFORMANCE 2026

(Data for the month ended 27 February 2026)

Country	Index	Daily Return	YTD Return
South Korea	KOSPI	-1.00%	48.17%
Taiwan	Taiwan Weighted	0.00%	22.27%
Thailand	SET Index	-0.24%	21.45%
Japan	Nikkei 225	0.85%	17.14%
Bangladesh	DSE Broad	-0.19%	13.92%
Philippines	PSEi Composite	-0.21%	9.22%
China	SZSE Component	-0.06%	7.17%
China	Dow Jones Shanghai (DJSH)	0.48%	6.93%
Singapore	FTSE Singapore	-0.28%	6.79%
Australia	S&P/ASX 200	0.25%	5.56%
Vietnam	VN Index (VNI)	0.04%	5.37%
Sri Lanka	CSE All-Share	-0.20%	4.91%
Hong Kong	Hang Seng	0.95%	3.90%
Malaysia	FTSE Bursa Malaysia KLCI	-1.40%	2.17%
New Zealand	NZX 50	0.38%	1.29%
India	Nifty 50	-1.22%	-3.62%
Pakistan	Karachi All Share	-0.10%	-3.66%
India	BSE Sensex 30	-1.17%	-4.62%
Indonesia	JSE Composite	-0.09%	-4.85%

# MARKET PERFORMANCE BY YTD RETURN

(Data for the month ended 27 February 2026)



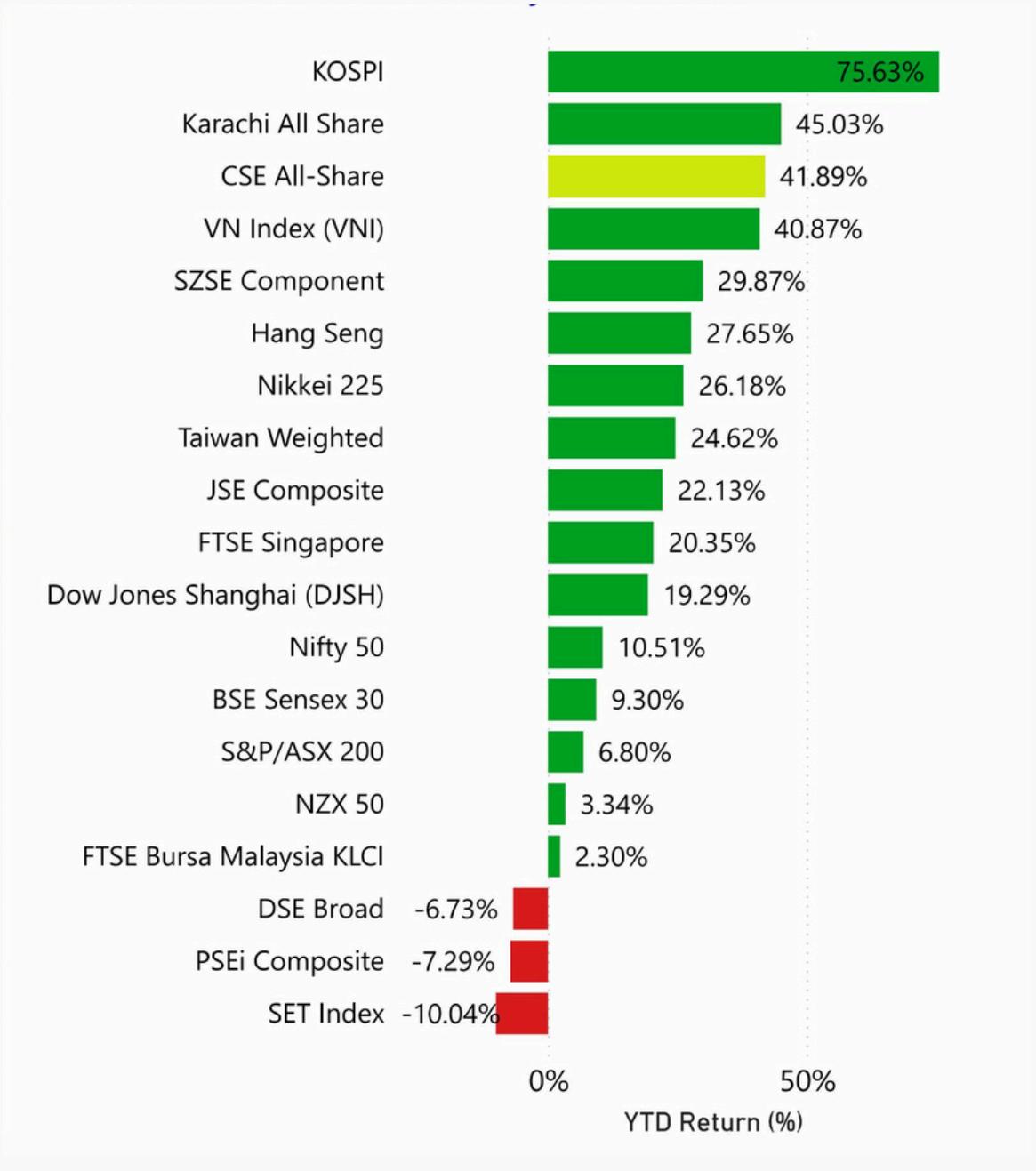
# REGIONAL MARKET PERFORMANCE 2025

(Data for the year ended 31 December 2025)

Country	Index	Daily Return	YTD Return
South Korea	KOSPI	-0.15%	75.63%
Pakistan	Karachi All Share	0.02%	45.03%
Sri Lanka	CSE All-Share	0.79%	41.89%
Vietnam	VN Index (VNI)	1.00%	40.87%
China	SZSE Component	-0.58%	29.87%
Hong Kong	Hang Seng	-0.96%	27.65%
Japan	Nikkei 225	-0.37%	26.18%
Taiwan	Taiwan Weighted	-0.36%	24.62%
Indonesia	JSE Composite	0.03%	22.13%
Singapore	FTSE Singapore	-0.08%	20.35%
China	Dow Jones Shanghai (DJSH)	-0.05%	19.29%
India	Nifty 50	0.74%	10.51%
India	BSE Sensex 30	0.87%	9.30%
Australia	S&P/ASX 200	-0.03%	6.80%
New Zealand	NZX 50	0.00%	3.34%
Malaysia	FTSE Bursa Malaysia KLCI	-0.26%	2.30%
Bangladesh	DSE Broad	0.08%	-6.73%
Philippines	PSEi Composite	-0.21%	-7.29%
Thailand	SET Index	0.45%	-10.04%

# MARKET PERFORMANCE BY YTD RETURN

(Data for the year ended 31 December 2025)



# 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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