

WEEKLY STOCK MARKET HIGHLIGHTS

Friday, 04 January 2019



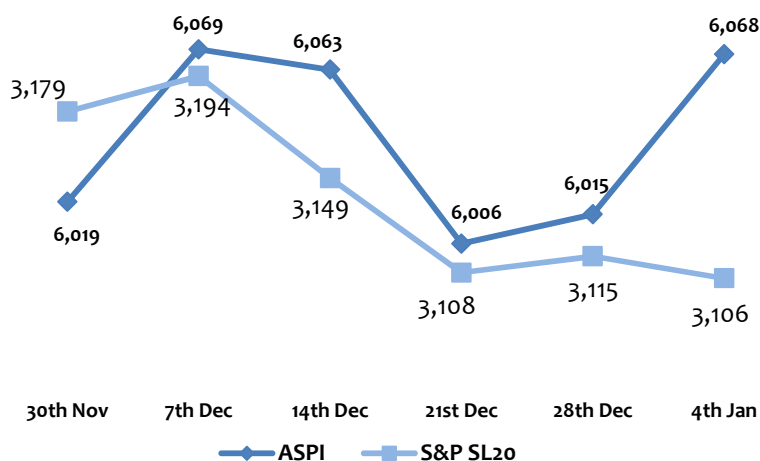
**ASHA PHILLIP
SECURITIES LTD**

Sri Lanka

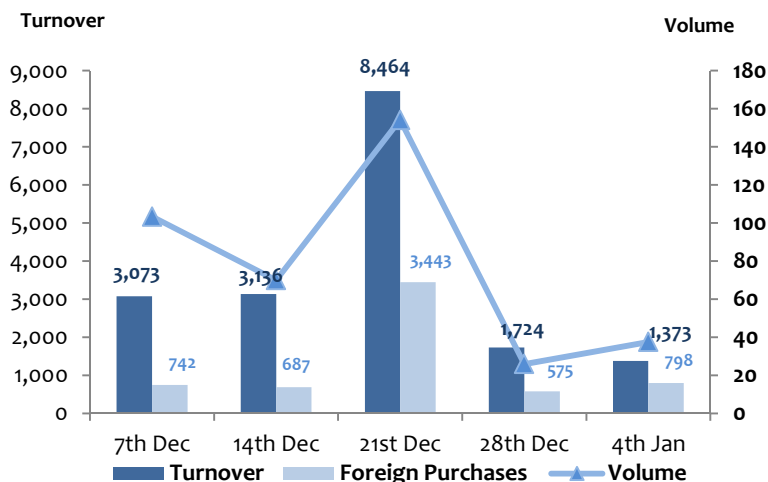
Market Statistics.

Index	4th Jan	28th Dec	Change	% Change
ASPI	6,067.66	6,015.23	↑ 52.43	↑ 0.87%
S&P SL20	3,105.75	3,115.42	↓ (9.67)	↓ -0.31%
Market Statistics (Mn)		4th Jan	28th Dec	% Change
Turnover (Rs.)		1,373.47	1,724.50	↓ -20.4%
Domestic Purchases		575.29	1,149.24	↓ -49.9%
Domestic Sales		468.19	1,412.95	↓ -66.9%
Foreign Purchases		798.17	575.26	↑ 38.7%
Foreign Sales		905.28	311.55	↑ 190.6%
Share Volume (No.)		37.43	25.83	↑ 44.9%
Market Cap (Rs. Bn)		2,846.62	2,822.02	↑ 0.9%
PER		9.67	9.59	↑ 0.8%
PBV		1.18	1.17	↑ 0.9%

Market Indices.



Turnover, Volume and Foreign Purchase.



Performance of the Market

- Monday: Appreciation of Large-caps amidst lower Investor participation, made the Bourse to close the year on positive note. Outflows on Government securities weighed on the currency; Expectations of Year 2019 as an "Election Year" attracted retail interest. ASPI gained 37.14 points (+0.62%).
- Tuesday: Bourse closed for New Year.
- Wednesday: Bourse started the year with positive momentum but, volatility in large caps amidst thin trades weighed on both the indices; ASPI was negative during most part of the session, surge in CTC during last hour turned ASPI positive. ASPI gained 9.83 points (+0.16%).
- Thursday: Volatility on banks HNB, SAMP and DFCC noted for the 2nd consecutive day. Foreign to foreign transactions on HHL had lifted the day's turnover; fluctuations on DIAL and JKH weighed on the indices. ASPI lost 3.72 points (-0.06%).
- Friday: Attractive dividend on HEXP and unusual activities on HUNA during last 3 sessions (price rallied from 79 to 137.40 or +74%) brought positiveness to the Bourse. Possibilities of regaining the foreign funded projects and loans too added positiveness but, increasing worries over the political stability and global trends affected the investor participation.

Summary

- ASPI moved between 6,009.92 - 6,072.80 points and settled the week on positive note at 6,067.66 with a gain of 52.43 points (+0.87%).
- The S&P SL20 Index got affected by the adverse movements in Banks & other large-caps and settled the week on negative note at 3,105.75 with a loss of 9.67 points (-0.31%)
- The total turnover for the week recorded as LKR 1.37Bn, down by 20% from its previously recorded LKR 1.72Bn; foreign investors turned net sellers for the week.
- Off board trades represented 8% of the week's turnover, accounting for LKR 103.5Mn through 2 trades.

Sectorial Overview

- Diversified Holdings (DIV) sector stood on top providing LKR 752Mn capturing 55% of the week's total turnover.
- Bank Finance & Insurance (BFI) and Manufacturing (MFG) sectors stood second and third providing LKR 467Mn and LKR 50Mn respectively to the weekly aggregated turnover.

Weekly Market Highlights & Statistics

Highest Turnover

Company Name	Share Vol.	Turnover (LKR)	Low (LKR)	High (LKR)	Cur.Week Close	Prv.Week Close	Change (LKR)	Change
HEMAS HOLDINGS PLC	5,744,454	503,677,296	87.60	89.00	87.90	88.50	(0.60)	-0.68%
JOHN KEELLS HOLDINGS PLC	1,225,415	192,856,871	155.0	160.0	157.50	156.00	1.50	0.96%
COMMERCIAL BANK OF CEYLON PLC	1,031,451	118,608,905	114.00	115.90	115.00	115.00	-	0.00%
HATTON NATIONAL BANK PLC	503,797	103,159,879	205.00	214.90	208.00	214.10	(6.10)	-2.85%
SAMPATH BANK PLC	335,403	77,745,937	229.00	235.50	229.00	235.00	(6.00)	-2.55%

Highest Volume

Company Name	Share Vol.	Turnover (LKR)	Low (LKR)	High (LKR)	Cur.Week Close	Prv.Week Close	Change (LKR)	Change
HEMAS HOLDINGS PLC	5,744,454	503,677,296	87.60	89.00	87.90	88.50	(0.60)	-0.68%
SMB LEASING PLC	5,639,621	2,818,750	0.40	0.50	0.40	0.50	(0.10)	-20.00%
JANASHAKTHI INSURANCE COMPANY PLC	2,041,752	61,942,118	29.50	31.50	30.60	29.60	1.00	3.38%
LOLC FINANCE PLC	1,972,368	7,007,621	88.60	90.00	89.00	89.90	(0.90)	-1.00%
SOFTLOGIC HOLDINGS PLC	1,918,497	40,974,817	20.00	21.50	20.10	214.40	(194.30)	-90.63%

Top Gainers

Company Name	VWA Week Close	Change (LKR)	Change %	Turnover (LKR)
HUNAS FALLS	131.80	51.30	63.73	9,973,059.9
KELANI VALLEY	99.70	19.50	24.31	9,970
AGSTAR PLC	4.70	0.90	23.68	362,736.70
ODEL PLC	29.50	4.50	18.00	54,040.00
NATION LANKA	0.70	0.10	16.67	53,873.50

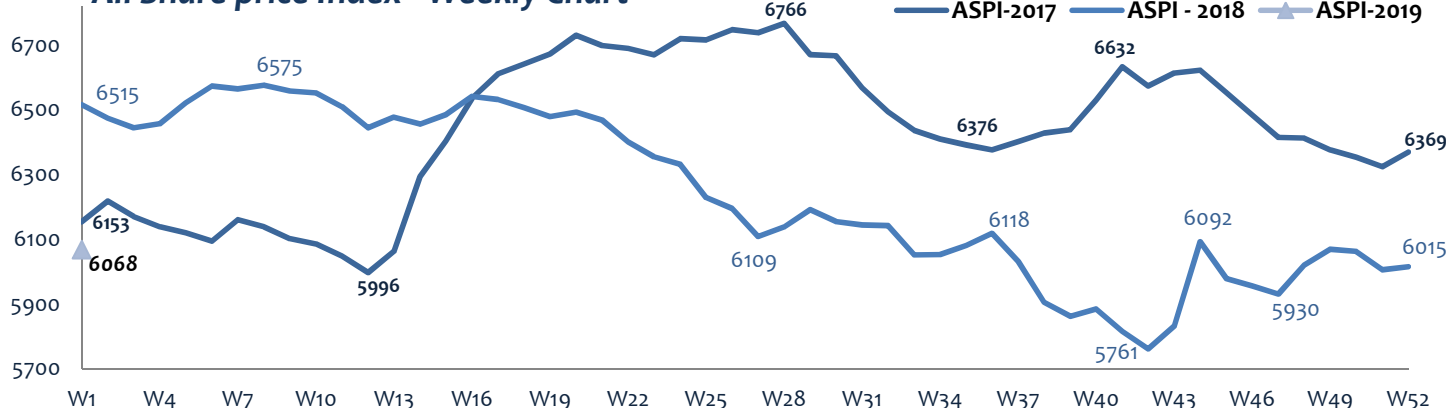
Top Losers

Company Name	VWA Week Close	Change (LKR)	Change %	Turnover (LKR)
TESS AGRO	0.40	(0.10)	(20.00)	151,089.80
S M B LEASING	0.40	(0.10)	(20.00)	2,818,750
HARISCHANDRA	1,252.30	(247.20)	(16.49)	511,922.50
BERUWALA RESORTS	0.60	(0.10)	(14.29)	13,441.70
LAKE HOUSE PRIN.	140.00	(22.90)	(14.06)	32,965.9

Crossings

Name	Symbol	Avg Price	Trades	T.Volume	Turnover
Commercial Bank Of Ceylon PLC	COMB.N0000	115.00	2	899,792	103,476,080

All Share price Index - Weekly Chart



Foreign Transactions.

Company Name	Avg Price	Net change in Qty	Net Foreign Inflow	Company Name	Avg Price	Net change in Qty	Net Foreign Outflow
SOFTLOGIC	21.46	1,500,000	32,190,000	JKH	156.67	(884,564)	(138,584,060)
TEEJAY LANKA	32.72	548,607	17,950,992	DISTILLERIES	16.10	(718,655)	(11,570,346)
SAMPATH	233.58	45,066	10,526,531	DIALOG (+)	10.00	(691,588)	(6,915,880)
GRAIN ELEVATORS (+)	60.91	14,800	901,530	LANKA IOC	23.91	(234,485)	(5,606,793)
HNB	208.02	3,961	823,984	MELSTACORP	49.28	(59,815)	(2,947,451)
ACCESS ENG SL	14.01	11,600	162,460	COMMERCIAL BANK	114.97	(25,257)	(2,903,805)
PEOPLES LEASING	15.82	7,628	120,672	MERCHANT BANK	10.38	(46,524)	(482,945)
CENTRAL FINANCE	88.20	1,233	108,751	RENUKA AGRI	2.10	(219,826)	(461,635)
KEELLS HOTELS	7.80	6,050	47,209	BAIRAHA FARMS	129.19	(2,233)	(288,480)
TOKYO CEMENT[X]	22.24	2,039	45,344	RENUKA FOODS[X]	10.9	(14,063)	(153,287)

Foreign Participation

- **Aggregate foreign buying** for the Week totaled up to **LKR 798.17Mn.**
- **Foreign sales** for the Week amounted to **LKR 905.28Mn.**
- **Net foreign outflow** for the Week was **LKR 107.1Mn**, YTD net foreign outflow presently stands at **LKR 107.1Mn**
- **SHL** notched the “Top Net Purchasers” slot with a net inflow of **LKR 32.19Mn** whilst **JKH** notched the “Top net Sellers” slot with a net outflow of **LKR 138.58Mn.**

Summary of Key Announcements during the week

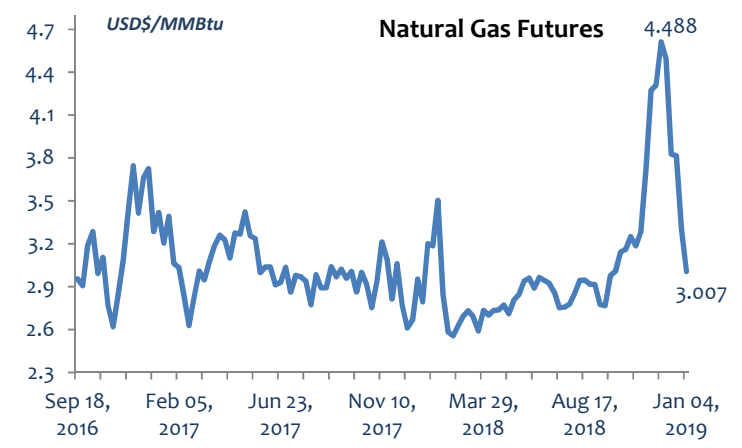
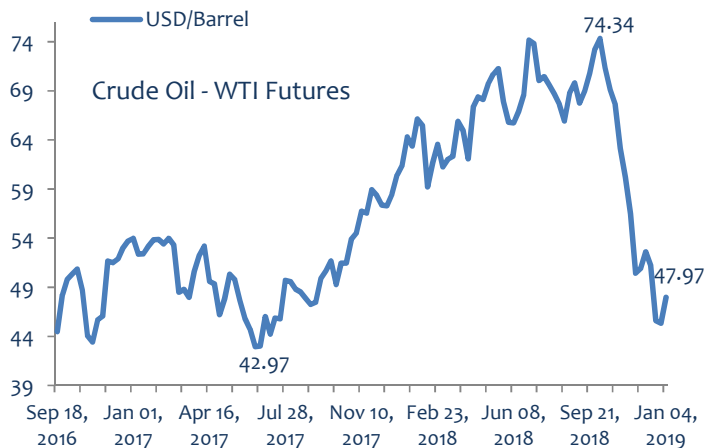
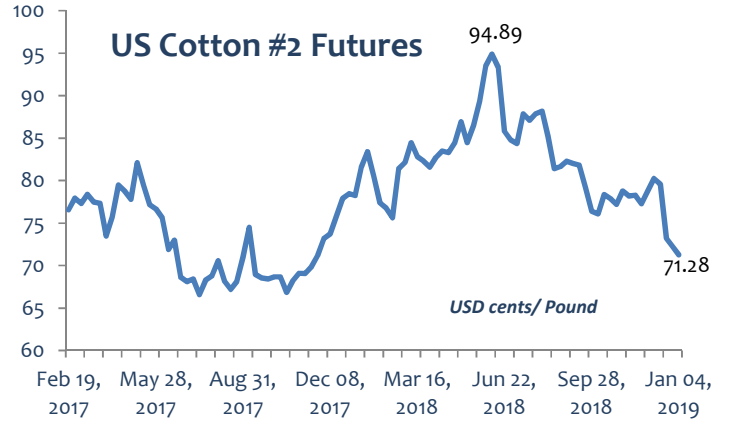
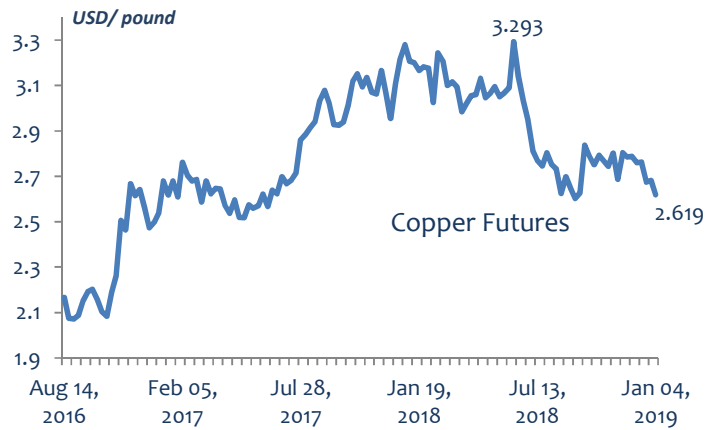
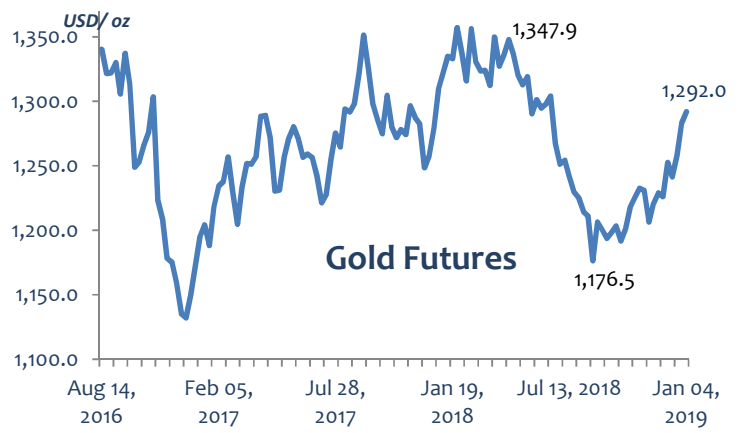
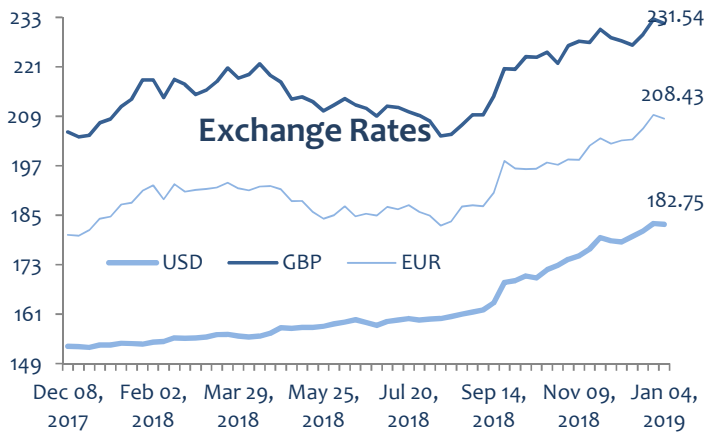
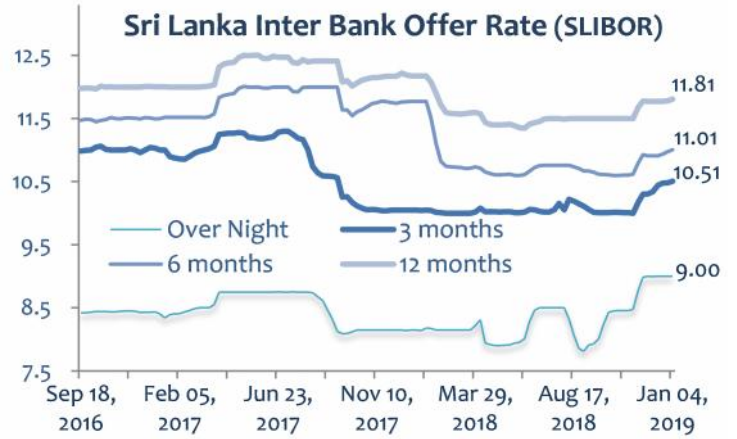
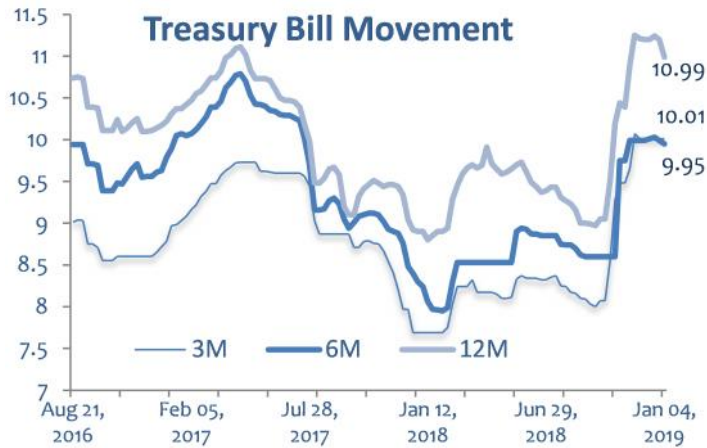
- Mr. **Susantha Chaminda Ratnayake** the Chairman and Executive Director of **John Keells Holdings PLC (JKH)**, retired from JKH with effect from 31 December 2018 and accordingly ceased to be a Director of JKH and its subsidiaries and associate companies, namely Asian Hotels And Properties PLC, Ceylon Cold Stores PLC, John Keells PLC, John Keells Hotels PLC, Trans Asia Hotels PLC, Keells Food Products PLC and Tea Smallholder Factories PLC, with effect from 31 December 2018, **Mr. Krishan Niraj Jayasekera Balendra**, was appointed to JKH as Chairman and Chief Executive Officer; and **Mr. Joseph Gihan Adlsha Cooray** was appointed as Deputy Chairman / Group Finance Director of JKH with effect from 01 January 2019.
- The Net Asset Value of **NAMAL Acuity Value Fund** as at 31st Dec 2018 is LKR 98.60 per unit.
- Net asset value per unit of the **Candor Opportunities Fund** as at 31st Dec 2018, LKR 9.20.

➤ Dealings By Directors

Counter	Nature	Director / Company involved	No of Shares	Price	Date
BERU	Purchase	Mr. A Rajaratnam (Financial Trust Limited)	215,877	0.70	26 Dec.
BERU	Disposal	Mr. A Rajaratnam	200,000	0.70	26 Dec.
CARS	Purchase	Mr D A Cabraal (Chairman of LION & BREW)	598	170.20	24 Dec.
CIT	Purchase	Mr A Rajaratnam (Financial Trust)	137	60.00	31 Dec.
SCAP	Purchase	Mr W L P Wijewardena	100	6.20	19 Dec.
SHL	Disposal	Arunodhaya Pvt Ltd (Dr S Selliah)	498,000	21.50	31 Dec.
SHL	Disposal	Arunodhaya Industries Pvt Ltd (Dr S Selliah)	140,136	21.50	32 Dec.
SHL	Disposal	Arunodhaya Investments Pvt Ltd (Dr S Selliah)	498,000	21.50	33 Dec.

Economic Indicators & Other Statistics

Source: *investing.com* & *cbsl.gov.lk*



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