

WEEKLY STOCK MARKET HIGHLIGHTS

Friday, 18 January 2019



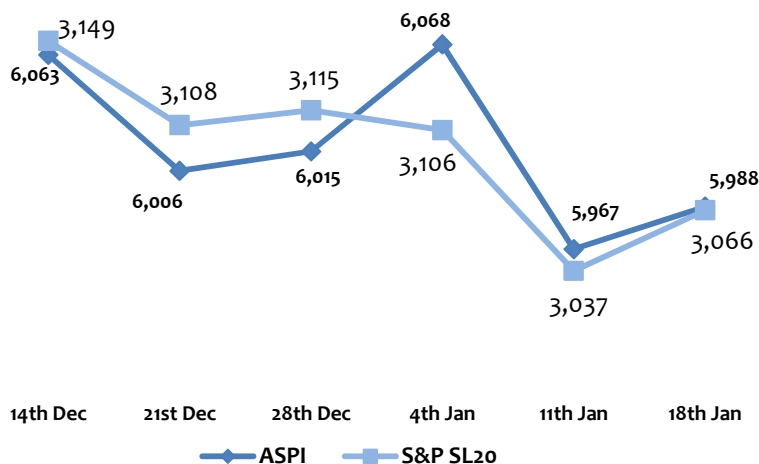
ASHA PHILLIP
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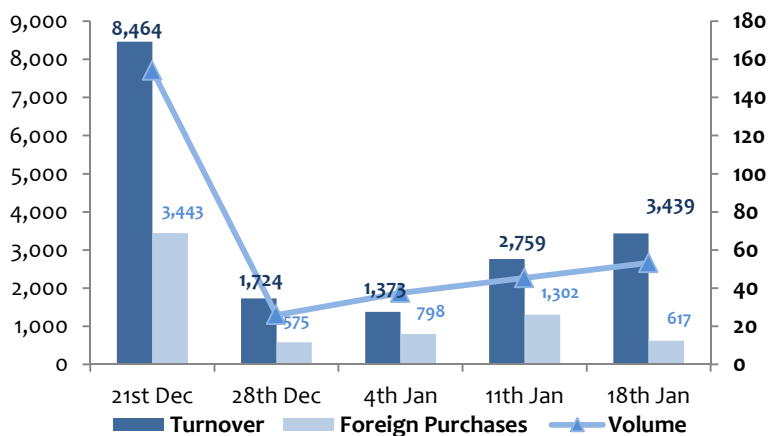
Market Statistics.

Index	18th Jan	11th Jan	Change	% Change
ASPI	5,988.07	5,967.27	↑ 20.80	↑ 0.35%
S&P SL20	3,066.29	3,036.61	↑ 29.68	↑ 0.98%
Market Statistics (Mn)		18th Jan	11th Jan	% Change
Turnover (Rs.)		3,439.40	2,758.61	↑ 24.7%
Domestic Purchases		2,822.83	1,456.97	↑ 93.7%
Domestic Sales		1,366.02	704.70	↑ 93.8%
Foreign Purchases		616.57	1,301.63	↓ -52.6%
Foreign Sales		2,073.38	2,053.90	↑ 0.9%
Share Volume (No.)		53.22	45.27	↑ 17.5%
Market Cap (Rs. Bn)		2,809.28	2,799.52	↑ 0.3%
PER		9.57	9.51	↑ 0.6%
PBV		1.16	1.16	↓ 0.0%

Market Indices.



Turnover, Volume and Foreign Purchase.



Performance of the Market

- Monday: Off board deals on **HUNA**, **COMB**, **JKH** & **LION** contributed 67% of the day's turnover; overall positive sentiments prevailed throughout the session. ASPI gained 13.75 points (+0.23%).
- Tuesday: Bourse Closed for religious festival
- Wednesday: Continuing foreign outflow on **JKH** weighed on investor sentiments; lower economic activities expected to hinder the December ended 3Q performance of retail sector counters. Speculative trades attracted some retail investors. ASPI lost 7.68 points (-0.13%). Average yields declined at the T-Bill auction for the fourth consecutive week.
- Thursday: Bourse witnessed overall positive signs, speculation on several counters triggered the retail investor activities. Foreign investor participation was low. ASPI gained 15.78 points (+0.26%). Weekly tea auction prices and volumes witnessed improvements.
- Friday: Agreements with foreign lenders and positive statement from CB chief added positiveness to investor sentiments. Activities improved on fundamentally sound counters. ASPI lost 1.05 points (-0.02%) due to decline on few large-caps.

Summary

- ASPI was moved between 5,962.23 – 6,004.60 points and settled the week on positive note at 5,988.07 with a gain of 20.8 points (+0.35%).
- The S&P SL20 Index also followed the same trend and settled the week on positive note at 3,066.29 with a gain of 29.68 points (+0.98%)
- The total turnover for the week recorded as LKR 3.44Bn, up by 24.7% from its previously recorded LKR 2.76Bn; foreign investors remained net sellers for the week.
- Off board trades represented 64% of the week's turnover, accounting for LKR 2,194.11Mn through 25 trades.

Sectorial Overview

- Diversified Holdings (DIV) sector stood on top providing LKR 1,781Mn capturing 52% of the week's total turnover.
- Hotels & Travels (H&T) and Bank Finance & Insurance (BFI) sectors stood second and third providing LKR 888Mn and LKR 422Mn 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
JOHN KEELLS HOLDINGS PLC	11,341,008	1,731,357,518	152.00	155.00	154.50	153.00	1.50	0.98%
HUNAS FALLS HOTELS PLC	4,618,802	863,097,652	175.0	187.0	186.50	160.10	26.40	16.49%
COMMERCIAL BANK OF CEYLON PLC	1,756,154	200,530,959	114.00	115.10	114.50	114.00	0.50	0.44%
SAMPATH BANK PLC	424,599	95,156,374	219.50	238.00	230.00	218.10	11.90	5.46%
LION BREWERY CEYLON PLC	158,283	88,163,615	555.00	570.00	570.00	556.30	13.70	2.46%

Highest Volume

Company Name	Share Vol.	Turnover (LKR)	Low (LKR)	High (LKR)	Cur.Week Close	Prv.Week Close	Change (LKR)	Change
JOHN KEELLS HOLDINGS PLC	11,341,008	1,731,357,518	152.00	155.00	154.50	153.00	1.50	0.98%
HUNAS FALLS HOTELS PLC	4,618,802	863,097,652	175.00	187.00	186.50	160.10	26.40	16.49%
MTD WALKERS PLC	4,085,210	61,883,126	10.20	17.20	15.50	10.00	5.50	55.00%
ANILANA HOTELS AND PROPERTIES PLC	3,823,766	4,231,296	1.10	1.20	1.10	1.20	(0.10)	-8.33%
LANKEM DEVELOPMENTS PLC	2,827,827	12,573,657	3.80	4.70	4.40	3.90	0.50	12.82%

Top Gainers

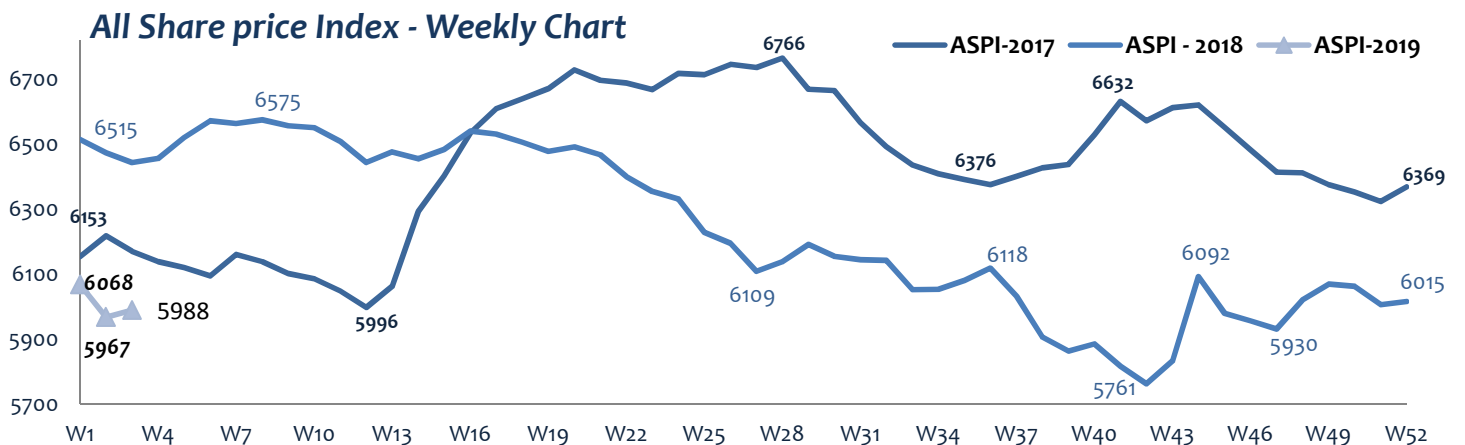
Company Name	VWA Week Close	Change (LKR)	Change %	Turnover (LKR)
AMF CO LTD	631.80	231.80	57.95	634,360.6
MTD WALKERS	15.50	5.50	55.00	61,883,126
BLUE DIAMONDS [X]	0.30	0.10	50.00	1,230.90
EDEN HOTEL LANKA	16.50	3.50	26.92	694,860.70
ARPICO	199.20	40.10	25.20	3,640,863.10

Top Losers

Company Name	VWA Week Close	Change (LKR)	Change %	Turnover (LKR)
TESS AGRO [X]	0.40	(0.10)	(20.00)	17,630.70
S M B LEASING	0.40	(0.10)	(20.00)	73,515
AMAYA LEISURE	42.20	(8.60)	(16.93)	7,625,117.20
COMM LEASE & FIN	2.50	(0.50)	(16.67)	5,047.80
SERENDIB HOTELS [X]	14.00	(2.70)	(16.17)	2,800.0

Crossings

Name	Symbol	Avg Price	Trades	T.Volume	Turnover
John Keells Holdings PLC	JKH.N0000	152.39	16	7,850,520	1,196,314,880
Hunas Falls Hotels PLC	HUNA.N0000	187.00	5	4,364,975	816,250,325
Commercial Bank Of Ceylon PLC	COMB.N0000	114.00	3	1,129,690	128,784,660
Lion Brewery Ceylon PLC	LION.N0000	555.00	1	95,057	52,756,635



Foreign Transactions.

Company Name	Avg Price	Net change in Qty	Net Foreign Inflow	Company Name	Avg Price	Net change in Qty	Net Foreign Outflow
SAMPATH	219.88	118,706	26,100,682	JKH	152.59	(9,746,042)	(1,487,183,837)
TEEJAY LANKA	33.95	589,331	20,009,854	DIALOG (+)	10.00	(1,432,335)	(14,323,350)
LION BREWERY	570.00	20,400	11,628,000	HEMAS HOLDINGS	87.60	(110,000)	(9,636,000)
VALLIBEL FINANCE	70.60	51,217	3,615,920	AITKEN SPENCE	44.00	(76,355)	(3,359,620)
MULTI FINANCE	15.56	228,395	3,553,195	LANKEM DEV.	4.40	(441,702)	(1,943,489)
L O L C HOLDINGS	88.50	25,227	2,232,590	HAYCARB	130.00	(14,754)	(1,918,020)
GRAIN ELEVATORS (+)	60.93	27,156	1,654,653	COMMERCIAL BANK	114.78	(15,965)	(1,832,528)
HUNTERS	409.86	3,605	1,477,530	BAIRAHA FARMS	130.01	(13,124)	(1,706,195)
NAT. DEV. BANK	105.00	8,000	840,000	MTD WALKERS	16.93	(98,838)	(1,673,478)
RICHARD PIERIS	10.21	58,760	599,822	SEYLAN BANK[X]	43.1	(37,365)	(1,609,115)

Foreign Participation

- **Aggregate foreign buying** for the Week totaled up to **LKR 616.57Mn.**
- **Foreign sales** for the Week amounted to **LKR 2,073.38Mn.**
- **Net foreign outflow** for the Week was **LKR 1,456.81Mn**, YTD net foreign outflow presently stands at **LKR 2.35Bn**
- **SAMP** notched the “Top Net Purchasers” slot with a net inflow of **LKR 26.1Mn** whilst **JKH** notched the “Top net Sellers” slot with a net outflow of **LKR 1.49Bn.**

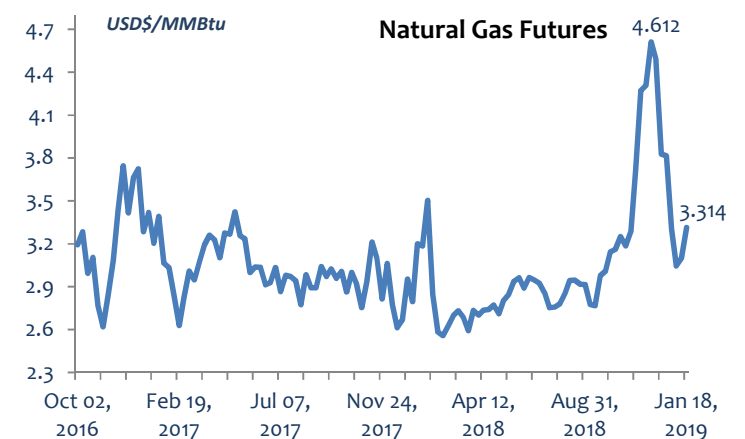
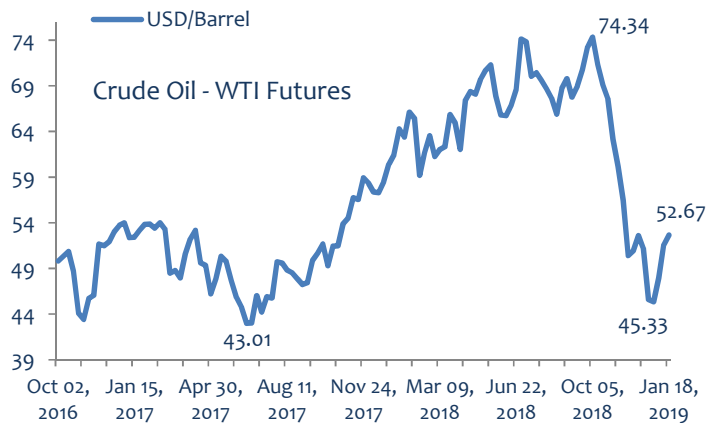
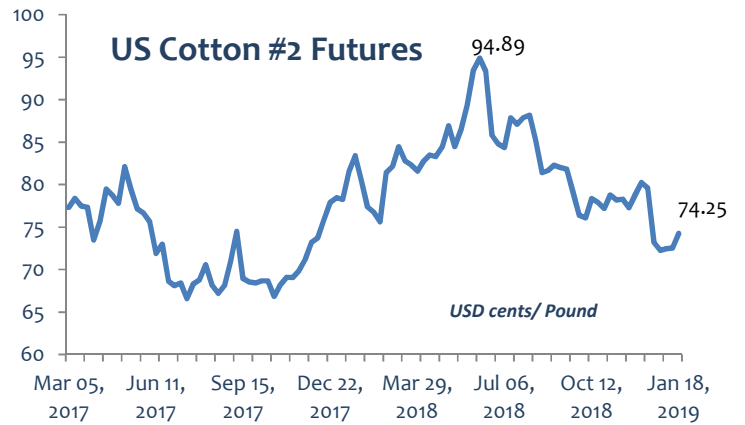
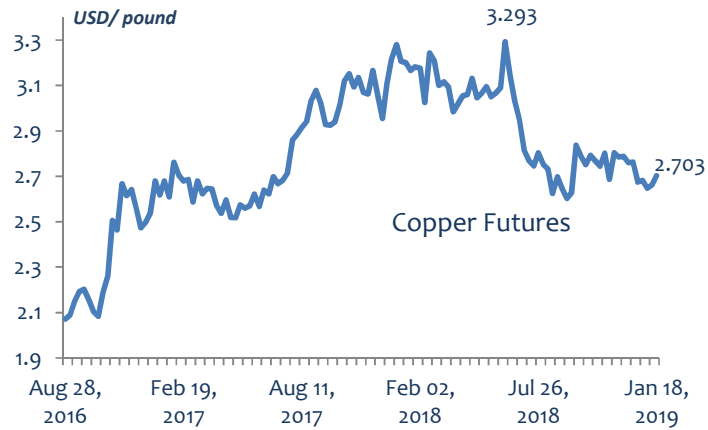
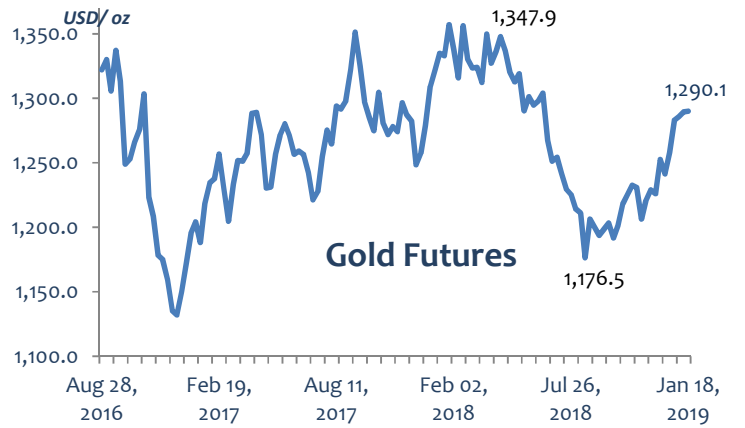
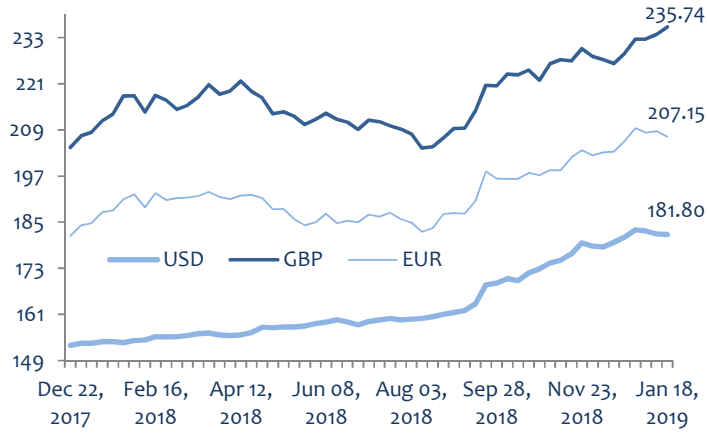
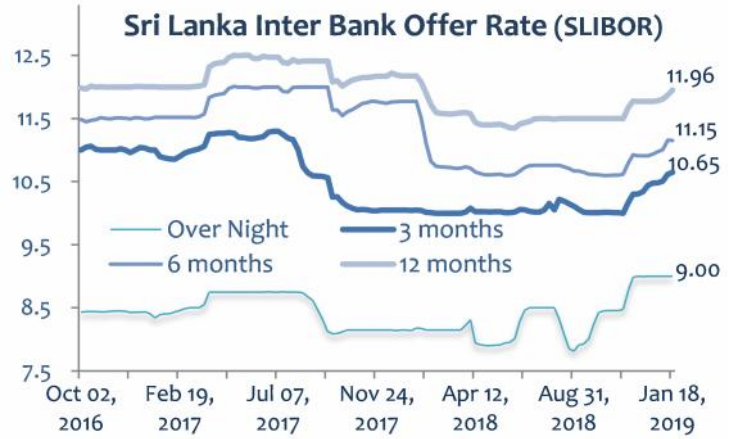
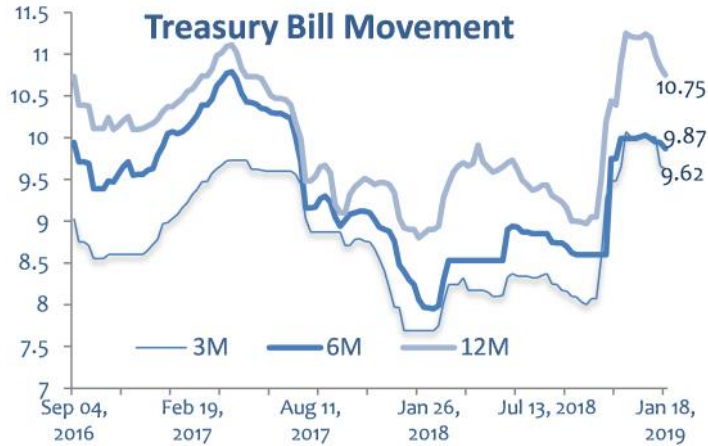
Summary of Key Announcements during the week

- **Hayleys PLC** said, two of its subsidiaries namely **Carbotels (Pvt) Ltd** and **Amaya Leisure PLC** disposed their 66.20% shareholdings in **Hunas Falls Hotels PLC (HUNA)** today for a consideration of LKR 187.00 per share to **Serenity Lake Leisure (Private) Limited**.
 - **John Keells Holdings PLC (JKH)** announces that in response to its **offer to repurchase** 69.38Mn shares (being 5% of its issued shares), JKH has **received acceptances** of 32.2Mn shares (46.39% of the offer) and applications for additional repurchase of 68.53Mn shares.
 - **Serenity Lake Leisure (Private) Limited** has announced a **mandatory offer** to purchase all the remaining issued and paid up ordinary voting shares of **Hunas Falls Hotels PLC (HUNA)** at a price of LKR 187 per share. Said, a detailed Offer Document giving other relevant information including the period during which the Offer would be kept open, will be forwarded to the shareholders within 35 days (on or before 18 Feb 2019).
 - **Asia Asset Finance PLC (AAF)** has published the dates for its proposed corporate actions and a circular explaining the matter to shareholders.
 - **MTD Walkers PLC (KAPI.N)** clarifying to CSE on the unusual trading activities of its securities said, Company has not engaged in any undisclosed price sensitive business activities or transactions to escalate the share price and do not have any knowledge of the reason for such an increase of price of the share and the volume of shares traded.
 - The Board of **Associated Motor Finance PLC (AMF)** also said, “Company is not aware of any undisclosed information or any other reason that may have influenced the price of the Company's shares during 1st Jan 2019 to 16th Jan 2019.
 - **Citizens Development Business Finance PLC (CDB)** has received applications for the subscription of 7.4Mn **debentures** for its 12.5Mn issue, as at 4:30 p.m. on the 17th January 2019.
- **Dealings By Directors**

Counter	Nature	Director / Company involved	No of Shares	Price	Date
MRH	Purchase	Mr Priyanjith Buddhika Panabokke	60	13.5	10 Jan.
SMOT	Disposal	Mr T D Gunasekera (MD)	4,290	425 - 451.50	16 Jan.

Economic Indicators & Other Statistics

Source: investing.com & cbsl.gov.lk



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