

LKR less volatile...

USD/LKR is less volatile and trading in the range of 295.25 - 297.75 and LKR has depreciated against USD by 0.85% year to date. In the Call Money Market excess liquidity has increased from the previous day.

	20.03.25		19.03.25	
	Opening	296.35	296.50	296.00
Closing	296.50	296.65	296.35	296.50
	20.03.25		19.03.25	
	Call Money Rate (%)	7.95	8.00	7.95
Repo Rate (%)	7.95	8.02	7.95	8.02
Liquidity (LKR)	178.93 Bn		172.12 Bn	

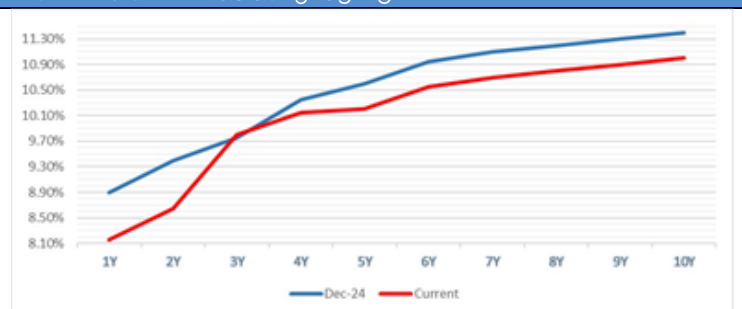
TREASURY BILL latest Auction on 19.03.2025

	This week	Last week	Year ago
03 Months	07.50	07.52	10.10
06 Months	07.84	07.86	10.21
12 Months	08.25	08.34	10.24

TREASURY BOND latest Auction on 12.03.2025

	15.12.29	15.12.32	15.09.34
Maturity date			
Yield (w.a) %	10.72	11.40	11.50
Coupon rate (p.a)(%)	11.00	11.50	10.25

BOND CURVE as at 19.03.25



EQUITY

	20.03.25	19.03.25
Turnover	3,670 Mn	1,254 Mn
Net Foreign Inflow	-35 Mn	14 Mn
S&P SL 20	4,700.14	4,605.21
ASPI	15,662.93	15,406.16

ECONOMIC INDICATORS

	This Week	Week ago	Year ago
AWPLR (%)	08.37	08.33	11.35
	Jan '25	Dec'24	Year ago
AWDR (%)	07.31	07.53	11.15

	Feb'25	Jan '25	Year ago
INFLATION (%)			
NCPI-YoY	-	-4.0	5.1
NCPI-Core	-	-0.2	2.7
CCPI -YoY	-4.2	-4.0	5.9
CCPI -Core	0.7	1.2	2.8

Bench Mark Rates	O/N	1M	3M	6M	12M
USD SOFR	4.3300	4.3192	4.3028	4.2352	4.0889
EUR ESTR	2.4160	2.4180	2.3100	2.2020	2.1000
GBP SONIA	4.4558	4.4604	4.3889	4.2995	4.1752

USD was on the front foot...

The U.S. dollar was on the front foot against major peers after its best single-day performance for three weeks with the Federal Reserve indicating no rush to cut interest rates.

The dollar index measure against a basket of six counterparts was steady at 103.81. The index plumped a five-month low at 103.19 this week following a steady decline from the highest since late 2022 at 110.17 as hopes for expansive policies under Trump gave way to anxiety that the global trade war he started could trigger a U.S. recession.

EURO little changed...

The euro, which has by far the heaviest weighting in the dollar index, was little changed at \$1.0854 after dropping 0.45% on previous day.

GBP rebounds...

The Pound Sterling rebounds against its major peers in the early North American session on previous day. The British currency bounces back after the Bank of England (BoE) keeps interest rates steady at 4.5%, as expected.

JPY edges higher...

USD/JPY edges higher and battles 149 following the release of Japan's National Core CPI. The dollar added 0.07% to 148.88 yen.

AUD struggling... & NZD having small gain...

The Australian and New Zealand dollars are set to end the week on a downbeat note, as risk aversion swept across markets amid trade war uncertainties.

The Aussie was struggling at \$0.6302, after falling nearly 1% overnight to a low of \$0.6300. It's on track to end the week 0.3% lower, with resistance around \$0.6390 and \$0.6408.

The kiwi dollar was at \$0.5759, having dropped 1% overnight to as low as \$0.5723. Although it remains well below the 2025 high of \$0.5830, it is set to finish the week with a small gain of 0.2%.

GOLD steady...

Gold held steady to trade below its record high hit in the previous session, supported by safe-haven demand arising from geopolitical and economic uncertainty, while the Federal Reserve's hint at rate cuts this year also fostered appeal.

OIL opened higher...

Oil prices rose in early Asian trading, and were set for their second consecutive weekly gains, after fresh U.S. sanctions on Iran and a new OPEC+ plan for seven members to cut output raised bets on tightening supply.