

### LKR volatility continued...

USD/LKR volatility continued and traded around 298.00 – 301.00 and LKR depreciated against USD by 1.78% year to date. Excess liquidity in the Call Money market has decreased from the previous day.

|                     | 28.05.25  |        | 27.05.25  |        |
|---------------------|-----------|--------|-----------|--------|
| Opening<br>Closing  | 299.75    | 299.85 | 299.65    | 299.85 |
|                     | 299.40    | 299.60 | 299.80    | 299.90 |
|                     | 28.05.25  |        | 27.05.25  |        |
| Call Money Rate (%) | 7.75      | 7.75   | 7.72      | 7.75   |
| Repo Rate (%)       | 7.75      | 7.75   | 7.75      | 7.80   |
| Liquidity (LKR)     | 196.06 Bn |        | 203.24 Bn |        |

### TREASURY BILL latest Auction on 28.05.2025

|           | This week | Last week | Year ago |
|-----------|-----------|-----------|----------|
| 03 Months | 07.55     | 07.65     | 8.62     |
| 06 Months | 07.77     | 07.97     | 9.04     |
| 12 Months | 07.98     | 08.29     | 9.18     |

### TREASURY BOND latest Auction on 09.05.2025

|                      |  |          |          |
|----------------------|--|----------|----------|
| Maturity date        |  | 15.10.29 | 01.11.33 |
| Yield (w.a) %        |  | 10.22    | 10.97    |
| Coupon rate (p.a)(%) |  | 10.35    | 9.00     |

### BOND CURVE as at 27.05.25



### EQUITY

|                    | 28.05.25  | 27.05.25  |
|--------------------|-----------|-----------|
| Turnover           | 4,272Mn   | 3,743Mn   |
| Net Foreign Inflow | -162.72Mn | 203.79Mn  |
| S&P SL 20          | 4,918.62  | 4,909.07  |
| ASPI               | 16,712.87 | 16,657.63 |

### ECONOMIC INDICATORS

|           | This Week<br>23.05.25 | Week ago | Year ago |
|-----------|-----------------------|----------|----------|
| AWPLR (%) | 08.47                 | 08.58    | 09.68    |
|           | Mar '25               | Feb '25  | Year ago |
| AWDR (%)  | 07.15                 | 07.21    | 10.30    |

| INFLATION (%) | Apr '25 | Mar '25 | Year ago |
|---------------|---------|---------|----------|
| NCPI-YoY      | -0.8    | -1.9    | 2.7      |
| NCPI-Core     | -       | -0.6    | 3.0      |
| CCPI -YoY     | -2.0    | -2.6    | 1.5      |
| CCPI -Core    | 0.8     | 0.7     | 3.4      |

| Bench Mark Rates | O/N    | 1M     | 3M     | 6M     | 12M    |
|------------------|--------|--------|--------|--------|--------|
| USD SOFR         | 4.3100 | 4.3268 | 4.3326 | 4.2850 | 4.0878 |
| EUR ESTR         | 2.1680 | 2.0250 | 1.9380 | 1.8410 | 1.7250 |
| GBP SONIA        | 4.2107 | 4.2202 | 4.2055 | 4.1476 | 4.0283 |

### USD rallied sharply...

The USD rallied sharply after a court blocked President from imposing his so-called Liberation Day import tariffs, with the currency surging against the euro, yen and Swiss franc in particular. The dollar index (DXY), which measures the U.S. currency against six major peers, climbed back above 100 for the first time in a week and was at 100.40.

### EUR slid 0.5% ...

The EUR slid 0.5% to 1.1232. after a U.S. federal court blocked President 's "Liberation Day" tariffs, with that USD surging against the EUR,

### GBP steady against the USD...

GBP steady against the USD, hovering near Monday's three-year high, as it continued to be supported by favourable economic data last week as well as Britain's recent trade deals. GBP was little changed at 1.3511 but stayed close to the three-year high of 1.3593 it touched on Monday.

### CAD edged lower...

The CAD edged lower against its U.S. counterpart as recent U.S. economic data bolstered the appeal of the American currency and ahead of domestic GDP data that could guide expectations for the Bank of Canada policy decision. The CAD was trading 0.2% lower at 1.3830 per USD,

### JPY declined ...

The JPY declined 0.6% against the USD to 145.72.

### AUD flat and NZD bounced...

The AUD flat at 0.6445, having fallen 0.7% overnight as its U.S. counterpart rallied. The pullback from a six-month top of \$0.6537 puts the focus on support around \$0.6400 and \$0.6358. The NZD bounced after the country's central bank cut interest rates as expected.

### GOLD prices 1 week low...

Gold hit a more than one-week low, as the USD rallied and risk sentiment improved after a U.S. federal court blocked President 's "Liberation Day" tariffs from going into effect. GOLD was down 0.5% at \$3,262.99.

### OIL prices rose...

Oil prices rose 1.74% as OPEC+ agreed to leave their output policy unchanged and as production shut-ins from Canada raised supply concerns, while investors anticipated members of OPEC+ would agree to a production increase later this week.