

### LKR stable...

USD/LKR stable and traded around 298.00 – 301.00 and LKR depreciated against USD by 1.87% year to date. Excess liquidity in the Call Money market has increased from the previous day.

|                     | 29.05.25 |           | 28.05.25  |        |
|---------------------|----------|-----------|-----------|--------|
| Opening<br>Closing  | 299.40   | 299.60    | 299.75    | 299.85 |
|                     | 299.40   | 299.50    | 299.40    | 299.60 |
|                     |          |           |           |        |
| Call Money Rate (%) |          | 7.70      | 7.75      | 7.75   |
| Repo Rate (%)       |          | 7.75      | 7.77      | 7.75   |
| Liquidity (LKR)     |          | 207.94 Bn | 196.06 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 29.05.2025

|                      |          |          |          |
|----------------------|----------|----------|----------|
| Maturity date        | 01.07.28 | 15.12.29 | 15.09.34 |
| Yield (w.a) %        | 8.85     | 9.47     | 10.46    |
| Coupon rate (p.a)(%) | 9.00     | 11.00    | 10.25    |

### BOND CURVE as at 29.05.25



### EQUITY

|                    | 29.05.25  | 28.05.25  |
|--------------------|-----------|-----------|
| Turnover           | 6,425Mn   | 4,272Mn   |
| Net Foreign Inflow | -218.11Mn | -162.72Mn |
| S&P SL 20          | 4,963.27  | 4,918.62  |
| ASPI               | 16,815.60 | 16,712.87 |

### 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     | -0.1   | -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         | 4.3300 | 4.3241 | 4.3398 | 4.2813 | 4.0941 |
| EUR ESTR         | 2.1670 | 2.0210 | 1.9380 | 1.8460 | 1.7360 |
| GBP SONIA        | 4.2104 | 4.2198 | 4.2050 | 4.1519 | 4.0387 |

### USD softened...

The U.S. dollar softened, heading for its fifth-straight monthly decline as traders braced for further bouts of uncertainty around trade and fiscal health, while investors awaited a pivotal inflation report later in the day.

The dollar index (DXY), which tracks the U.S. unit against a basket of six other currencies, was muted. The index was set for a decline of 0.4% in May, on course for its fifth month in the red.

### EUR one-and-a-half week low...

The EUR/USD one-and-a-half week low, and trades with a mild negative bias. The euro currently hover around the mid-1.1300s, down nearly 0.15%, though the downside remains cushioned.

### GBP ticked higher versus the USD...

The pound ticked higher versus the dollar, one of the few major currencies holding its ground against the greenback which earlier surged after a court blocked U.S.A.from imposing import tariffs on other countries.The pound was up 0.12% against the dollar at 1.347.

### CAD edged strengthened against USD...

The Canadian dollar strengthened against its U.S. counterpart as some investors doubted a U.S. court ruling would change the outlook for U.S. tariffs.The loonie was trading 0.2% higher at 1.3805 per U.S. dollar, or 72.44 U.S. cents, after moving in a range of 1.3786 to 1.3861.

### JPY firmed...

The Japanese yen firmed 0.3% to 143.73 per dollar after data showed underlying inflation in Tokyo hit a more than two-year high in May, keeping alive the chances of further interest rate hikes from the Bank of Japan.

### AUD flat and NZD fell...

The Australian and New Zealand dollars fell after a U.S. court blocked sweeping import tariffs from going into effect, sending the U.S dollar sharply higher.The Australian dollar eased a bit to \$0.6429 and was set for a marginal rise in May. The New Zealand dollar last bought \$0.5973.

### GOLD prices inched lower...

Gold prices inched lower as investors held back from making big bets ahead of a key U.S. inflation report that could shed more light on the Federal Reserve's policy path.

### OIL prices were on track to end the week down...

Oil prices were on track to end the week down more than 1% amid whipsawing tariff rulings in the U.S. and as the market braced for a potential OPEC+ output hike.