

LKR unchanged...

USD/LKR unchanged 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.

	03.06.25		02.06.25	
	Opening	Closing	Opening	Closing
	299.50	299.65	299.30	299.45
	299.40	299.45	299.55	299.65
	03.06.25		02.06.25	
	7.75	7.74	7.75	7.75
Call Money Rate (%)	7.75	7.80	7.75	7.80
Repo Rate (%)	156.62 Bn		149.94 Bn	
Liquidity (LKR)				

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 03.06.25



EQUITY

	03.06.25	02.06.25
Turnover	7.372Mn	5.862Mn
Net Foreign Inflow	-273.5Mn	-2.7Mn
S&P SL 20	5,131.28	5,034.92
ASPI	17,214.39	16,979.89

ECONOMIC INDICATORS

	This Week 30.05.25	Week ago	Year ago
AWPLR (%)	08.35	08.47	09.36
	Apr '25	Mar '25	Year ago
AWDR (%)	07.08	07.15	09.66

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	4.3500	4.3157	4.3178	4.2479	4.0368
EUR ESTR	2.1690	1.9820	1.9230	1.8370	1.7330
GBP SONIA	4.2112	4.2156	4.1860	4.1181	3.9756

USD drifted lower...

The USD drifted lower as the market looked ahead to U.S. employment data for immediate trading cues, while waiting on developments in President's tariff negotiations. The Trump administration has given a deadline for countries to submit their best offers on trade, the same day a doubling of duties to 50% on imported steel and aluminium comes into effect. The dollar index (DXY), which measures the currency against those two peers and four other counterparts, was flat at 99.159.

The EUR is up...

The EUR is up nearly 10% against the USD this year. EURUSD at-the-money risk reversal measures just edged off their highest level of bullishness for the EUR against the USD on records dating to 2007, apart from a brief interlude during the 2020 pandemic.

GBP steady against the USD...

The GBP steady against the USD, ahead of a raft of Bank of England speakers and an auction of long-dated government bonds that may offer a gauge of investor confidence in Britain's finances. Sterling was last down 0.15% GBP=D3 against the dollar at \$1.352.

The CAD edged lower...

The CAD edged lower against its USD, but was performing better than all the other Group of 10 currencies. The CAD was trading 0.1% lower at 1.3725 per U.S. dollar, after trading in a range of 1.3702 to 1.3742.

USD/JPY tested...

USD/JPY tested its cloud bottom as U.S. shares and Treasury yields firmed. The pair was also bolstered by monthly hedging flows in the greenback.

AUD and NZD gained ...

The AUD and NZD gained as the USD weakened on an escalation in global trade tensions, though negative sentiment in equity markets could limit further gains.

GOLD prices held steady...

Gold prices held steady as the uncertainty over U.S.-China trade relations offset the impact of strong U.S. jobs data that boosted risk appetite. Spot gold was steady at \$3,354.51 an ounce.

OIL prices edged lower...

Oil prices edged lower in early Asian trade, weighed down by a loosening supply-demand balance following increasing OPEC+ output and lingering concerns over the global economic outlook due to tariff tensions.