

MARKET SUMMARY REPORT

Date: 18.02.2026

1. Market Liquidity

Money market liquidity remained broadly stable, with overnight liquidity marginally declining to **Rs. 270.4 bn** from Rs. 271.0 bn. The Central Bank of Sri Lanka (CBSL) holdings of Government Securities remained unchanged at **Rs. 2,508.9 bn**, indicating steady liquidity management operations.

The Central Bank of Sri Lanka (CBSL) conducted an **Overnight Repo Auction on 17.02.2026** offering **Rs. 20,000 million** to the market.

- Bids Received:** Rs. 43,000 million
- Amount Accepted:** Rs. 20,000 million
- Weighted Average Yield:** 7.65%
- Accepted Max and Min Rates:** 7.65% – 7.65%

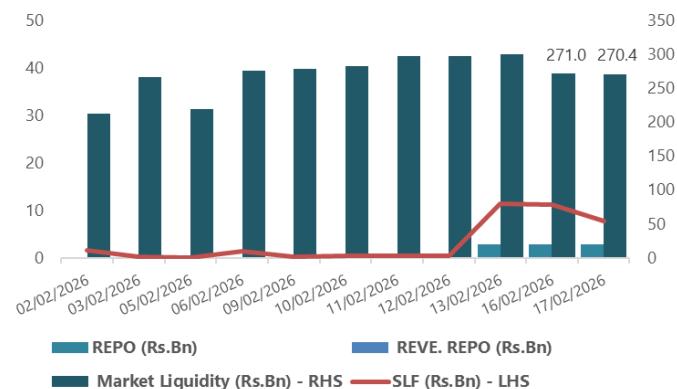
Overall, CBSL's operation appears to have effectively managed short-term liquidity conditions while maintaining rate stability within the targeted policy corridor.

2. Interest Rates

Short-term interest rates recorded marginal movements:

- WA Call Money Rate** increased slightly to **7.68%** (up by 1 bps).
- WA Repo Rate** prevailed at same levels of **7.68%**.
- AWPR (Weekly)** declined notably to **9.04%**, down by 28 bps, reflecting easing lending rates in the banking system.

Market Liquidity & SLF Borrowing



Short - term interest rates



■ Current ■ Last

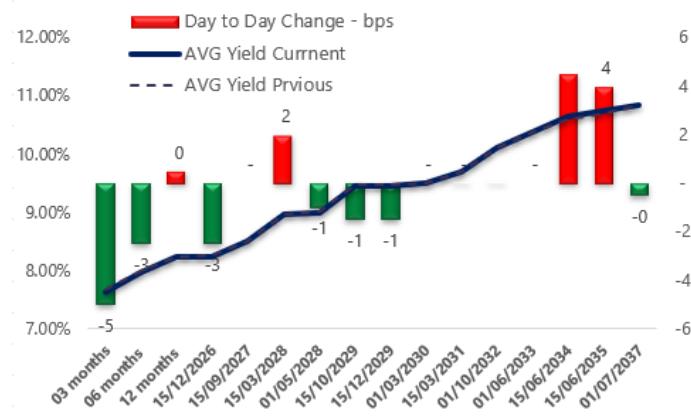
3. Secondary Market – Treasury Yields

The secondary market yield curve exhibited mixed movements:

- **Treasury bills** saw yield declines across shorter tenors:
 - 3M: down 5 bps to 7.63%
 - 6M: down 3 bps to 7.98%
 - 12M: broadly unchanged at 8.24%
- **Mid-tenor bonds** were largely stable with slight downward bias in select maturities (2028–2029).
- **Long-dated maturities (2034–2035)** recorded a modest upward adjustment of 4 bps, suggesting mild steepening at the far end of the curve.

The overall yield curve indicates stability in medium tenors, with some buying interest in the short end and slight pressure on longer maturities.

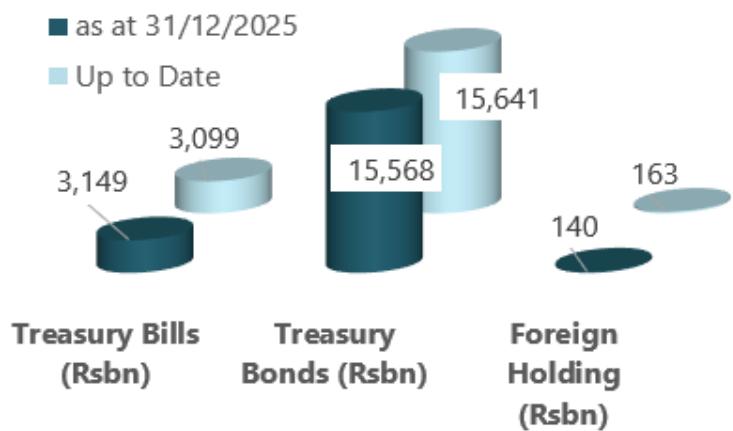
Secondary Market Yield Curve & Yield Changes



4. Government Securities Outstanding

- **Treasury Bills** outstanding decreased by Rs. 5.2 billion WoW to **Rs. 3,099.3 billion**, though remaining Rs. 49.4 billion lower compared to the beginning of the year.
- **Treasury Bonds** outstanding was kept at same on WoW basis to **Rs. 15,640.5 billion**, but are up Rs. 73.0 billion year-to-date.
- **Foreign Holdings** increased by Rs. 9.2 billion WoW to **Rs. 163.2 billion**, reflecting continued foreign investor interest.

Govt Securities Holding



5. Exchange Rate (LKR/USD)

The Sri Lankan Rupee remained relatively stable in the spot market.

- CBSL Indicative: **305.48 / 313.02**
- Market closing: **309.40 / 309.50**
- Previous closing: 309.20 / 309.25

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6. Inflation (YoY)

- **NCPI** accelerated to **2.9%** (from 2.4%).
- **CCPI** increased to **2.3%** (from 2.1%).

7. Share Market

The Colombo Stock Exchange recorded marginal declines:

- **All Share Index (ASPI)**: 23,882.82 (down from 23,900.11)
- **S&P SL20**: 6,708.71 (down from 6,710.33)

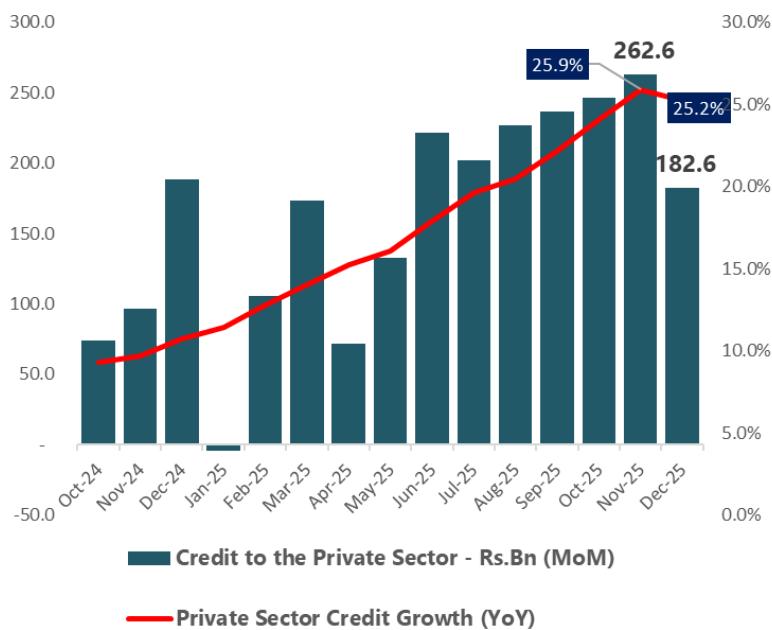
8. Commodities

- **Gold (Forward)** increased to USD 4,922.69.
- **Gold (LKR – CBSL indicative)** declined to Rs. 1,515,989.14.
- **Crude Oil (Futures)** remained stable at USD 67.43 per barrel.

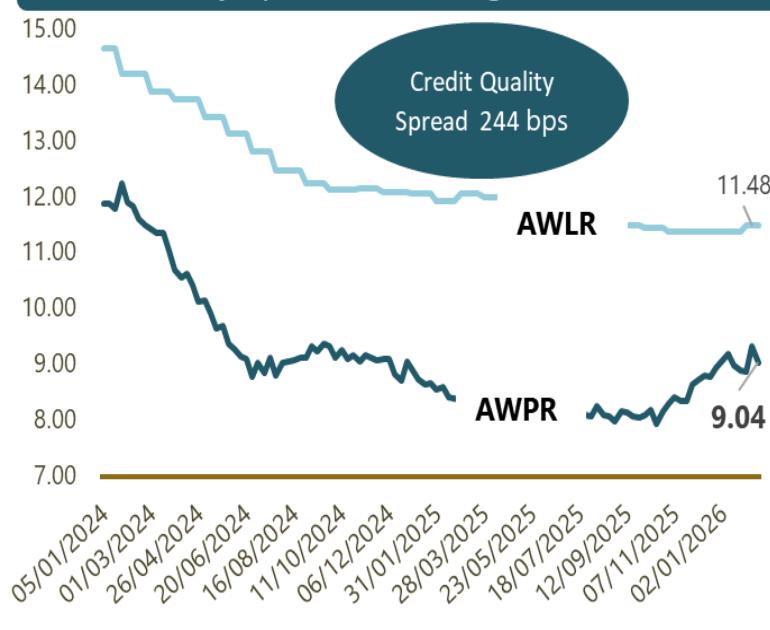
Gold Price - Troy Oz. LKR



Credit to Private Sector



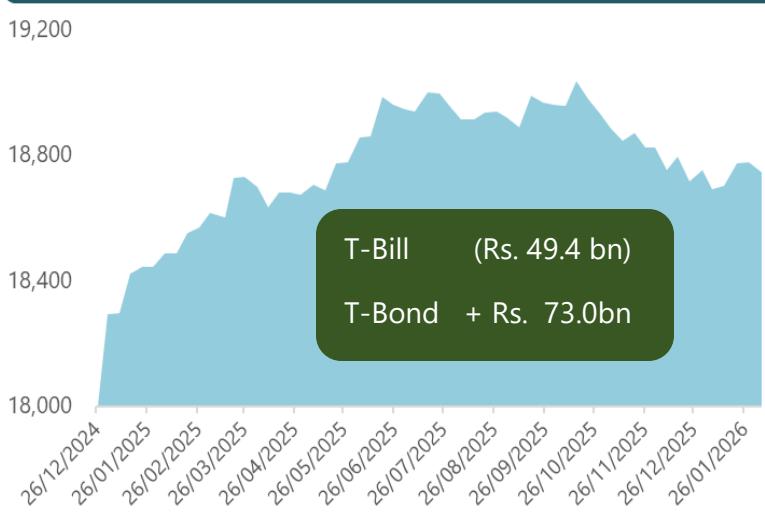
Credit Quality Spread Narrowing with AWPR



Gross Domestic Product (GDP) - Quarterly Growth Rates



G. Sec increased by Rs. 23.6 bn so far in the year - 2026



Disclaimer: This report is based on data from CBSL, Bloomberg, Daily FT, and [Investing.com](https://www.investing.com). It is for informational purposes only and should not be construed as investment advice.