

VIVO - New all time high

Semdex ↑ 2,165.37 Sem-10 ↑ 420.82 Demex ↑ 231.00

VIVO climbs to Rs182 (+2.2%), reaching a new all time high. The commerce stock finishes as second highest gainer for the day despite meagre exchanges with 1000 shares traded with value amounting to Rs181,150. Performance-wise, year-to-date, VIVO registers a positive return of 13.6%.

SEMDEX settles higher at 2,165.37 (+0.1%) with Total Volume Traded (TVT) standing at 7.9m and Market Value Traded (MVT) amounting to Rs64.0m.

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs34.8m compared to FI Purchases (FIP) of Rs15.7m. SBMH takes up the bulk of FIS while MCBG accounts for the majority of FIP.

Financial Services: MCBG gains 0.8% to Rs288 while CIM loses 0.8% to Rs7.62.

Commerce and Industry: INNODIS (-2.4%) and UBP (-0.1%) tumble to Rs41 and Rs130.25 each.

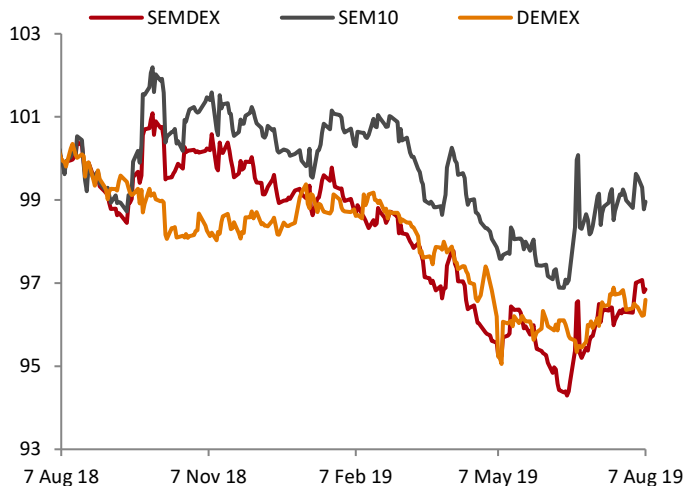
Investments: On the gainers side, ROGERS rises to Rs41 (+2.4%), CAUDAN to Rs1.10 (+0.9%), MDIT to Rs4.12 (+0.5%), PAD to Rs120 (+0.4%), TERRA to Rs22.60 (+0.4%), CIEL to Rs6.12 (+0.3%). On the losers side, BMH drops to Rs43.50 (-4.4%), MSE to Rs68 (-1.4%) and ENLG to Rs30 (-1.5%).

Leisure and Hotels: LOTTO gains 0.7% to Rs9.30 and NMH falls to Rs19 (-2.6%).

DEMEX goes up by 0.4% with RHT (+15.3%), BEE EQUITY (+1.1%), APL (+1.2%), ASCE (+1.0%) and COVI (+0.8%) on the upside while TPL.O (-0.6%) ends on the downside.

International equity markets: US-China currency war continues to impact global indices. NIKKEI (-0.7%), FTSE 100 (-0.7%) and EURO STOXX (-0.6%) closed on the downside. The S&P 500 ends six days losing streak closing higher at 2881.77 (+1.3%). Emerging markets index ended mostly up with IBOVESPA (+2.1%), MICEX (+1.3%), SENSEX (+0.8%) and JSE ALL SHARE (+0.2%) while SHANGHAI COMP lost 1.6%.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
ROGERS	2.4%	BMH	-4.4%
VIVO	2.2%	NMH.O	-2.6%
CAUDAN	0.9%	INNODIS	-2.4%
MCBG	0.8%	ENL	-1.5%
LOTTO	0.6%	MEDINE	-1.4%

Most Active (Value)		Key Market Statistics	
SBMH	40.7 m	Market Cap (Rs)	264.5 bn
MCBG	16.4 m	Market Cap (USD)	7.4 bn
ENL	0.8 m	Market Div Yield	4.0%
MEDINE	0.7 m	Market P/E	18.0x
BMH	0.7 m	FI Participation	47.5%

Summary Market Data		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,165.37	0.1%	1.2%	1.7%	
SEM-ASI	↑	1,999.28	0.05%	0.4%	1.3%	
SEM-VWAP	↓	2,001.09	-0.1%	0.3%	1.4%	
SEM10	↑	420.82	0.2%	0.6%	1.2%	
DEMEX	↑	231.00	0.4%	0.7%	1.4%	
Global Indices						
Japan: Nikkei 225	↓	20,585.31	-0.7%	-5.3%	-7.5%	
US: S&P 500	↑	2,881.77	1.3%	-3.6%	-1.7%	
UK: FTSE 100	↓	7,171.69	-0.7%	-5.1%	-2.8%	
Europe: Euro Stoxx 50	↓	3,291.66	-0.6%	-6.7%	-4.9%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	102,163.70	2.1%	-1.9%	7.5%	
Russia: MICEX	↑	2,683.35	1.3%	-5.4%	4.0%	
India: SENSEX	↑	36,976.85	0.8%	-6.4%	-4.2%	
China: Shanghai Comp	↓	2,777.56	-1.6%	-7.8%	-4.4%	
South Africa: JSE All Share	↑	55,062.01	0.2%	-4.4%	-6.2%	

Commodities				Currencies			
	Closing	ID Δ	12M Δ		Closing	ID Δ	12M Δ
Oil (Brent)	↓ 58.94	-1.5%	-20.1%	USDMUR	↓ 36.20	-0.1%	3.3%
Gold	↑ 1,474.42	0.7%	22.1%	EURMUR	→ 40.57	-	0.3%
Platinum	↓ 852.70	-0.3%	3.6%	GBPMUR	↓ 44.00	-0.1%	-2.8%

Selected stocks								
	Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
SEM-10								
MCBG	↑ 288.00	287.14	9.52	15.6 m	7.6 m	0.8%	-0.5%	4.9%
IBLL	→ 55.25	55.25	24.89	-	-	-	-1.8%	5.2%
SBMH	→ 5.48	5.48	11.36	-	36.0 m	-	-1.4%	-19.4%
GRIT (USD)	→ 1.33	1.33	9.37	-	-	-	-1.5%	-4.3%
ENL	↓ 30.00	30.01	-	-	0.3 m	-1.5%	1.7%	-8.4%
CIEL	↑ 6.12	6.12	22.67	-	0.002 m	0.3%	-3.2%	-7.8%
AFREXIM	→ 4.24	4.24	7.57	-	0.1 m	-	-2.5%	2.4%
NMH.O	↓ 19.00	19.02	-	-	-	-2.6%	13.1%	4.4%
ROGERS	↑ 41.00	41.00	18.64	-	-	2.4%	7.3%	13.9%
LUX	→ 58.00	58.00	19.21	-	-	-	-	-4.9%
DEM Most Active (3-month average)								
ASCENCIA	↑ 19.70	19.51	-	-	-	1.0%	2.1%	2.1%
EUDCOS	→ 12.50	12.49	7.27	-	-	-	-10.7%	-14.4%
ATTITUDE	↑ 13.00	13.00	7.56	-	-	1.2%	-	0.8%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
7-Aug-19	LOTTO	Official	Dividend	Interim	0.20	21-Aug-19	21-Sep-19
1-Jul-19	MDIT	Official	Dividend	Final	0.13	17-Sep-19	27-Sep-19
1-Jul-19	EUDCOS	DEM	Dividend	Final	0.25	15-Jul-19	10-Sep-19
28-Jun-19	CIEL	Official	Dividend	Final	0.14	15-Jul-19	29-Jul-19
28-Jun-19	PAD	Official	Dividend	Interim	2.65	15-Jul-19	16-Aug-19
28-Jun-19	CAUDAN	Official	Dividend	Final	0.04	15-Jul-19	16-Aug-19
28-Jun-19	RHT	DEM	Dividend	Final	0.40	15-Jul-19	2-Aug-19
26-Jun-19	INNODIS	Official	Dividend	Final	1.00	18-Aug-19	25-Sep-19
25-Jun-19	MEDINE	DEM	Dividend	Final	1.50	10-Jul-19	16-Sep-19

Latest Announcements

Date	Company	Details
5-Aug-19	NMH	The Board of Directors of New Mauritius Hotels Limited ('NMH') informed its shareholders and the public that a resolution will be proposed for the reduction of the stated capital pertaining to the ordinary shares of NMH from MUR 6,375,301,930 to MUR 2,780,301,930 at a special meeting of shareholders to be held on 10 September 2019 (the 'Proposed Capital Reduction'). The Proposed Capital Reduction shall not include a reduction in the stated capital pertaining to the redeemable non-voting preference shares of NMH nor shall it affect the number of ordinary shares in issue.

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