

PBL: -0.2% day-on-day

Semdex ↓ 2,126.35 Sem-10 ↓ 415.34 Demex ↑ 238.66

PBL finishes at Rs571, shedding 0.2%, after trading flat at Rs572 for four consecutive sessions. The industry stock finishes the day as second top value traded with on exchanges of 13.3k amounting to value traded of Rs7.6m. Banking stocks also finish on the negative side with **SBMH** tumbling further to Rs5.60 (-0.7%) as **MCBG** continues descent to Rs286.50 (-0.4%).

The SEMDEX inches down further to 2,126.35 (-0.3%) with market value traded (MVT) amounting to Rs55.5m for a total volume traded (TVT) of 520k.

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs42.1m against FI Purchases (FIP) of Rs36.2m. MCBG accounts for the bulk of foreign transactions.

Commerce and Industry: INNODIS drops to Rs39.15 (-0.6%) while IBL moves up 0.4% to Rs56.75.

Investments: Investment stocks are mostly negative with CIEL declining to Rs5.66 (-2.1%), CAUDAN to Rs1.07 (-1.8%), ENL to

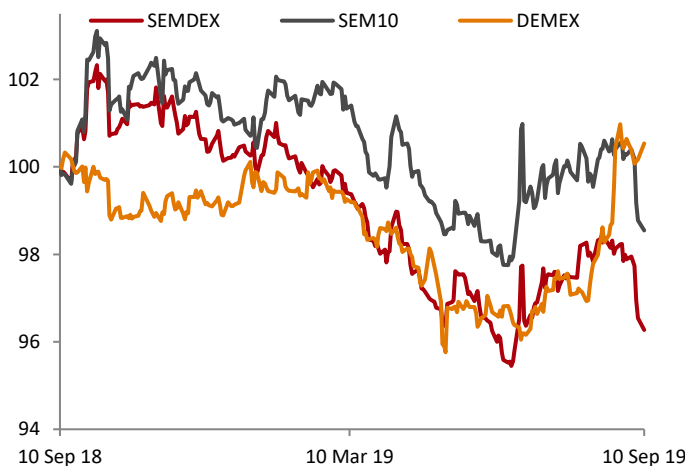
Rs27.70 (-1.1%), MEDINE to Rs65 (-0.8%) and POLICY to Rs5.46 (-0.4%). Only MDIT rises to Rs4.10 (+0.5%).

Leisure & Hotels: SUN retreats to Rs28.90 (-0.3%).

PD and Transport: BLUELIFE shrinks to Rs2.25 (-2.2%) while AIRM cuts 0.2% to Rs9.26.

International equity markets: The FTSE 100 (-0.6%) slump as the Pound gain ascension on official data that showed the UK economy grew by 0.3% in July, curbing the likelihood of a recession this year as Brexit looms large. The S&P 500 (-0.01%) narrowly end 3 day winning streak struggling for direction as investors await central bank policy decisions later this month. Emerging market indices had mixed performances with SHANGHAI COMP (+0.8%), SENSEX (+0.4%), IBOVESPA (+0.2%) while MICEX (-0.4%) and JSE ALL SHARE (-0.1%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
GRIT (USD)	0.8%	BLUELIFE	-2.2%
MDIT	0.4%	CIEL	-2.1%
IBLL	0.4%	CAUDAN	-1.8%
		ENL	-1.1%
		MEDINE	-0.8%

Most Active (Value)		Key Market Statistics	
MCBG	42.3 m	Market Cap (Rs)	259.7 bn
PBL	7.6 m	Market Cap (USD)	7.2 bn
LUX	1.3 m	Market Div Yield	4.2%
SBMH	1.1 m	Market P/E	14.6x
IBLL	0.8 m	FI Participation	70.6%

Summary Market Data		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,126.35	-0.3%	-1.6%	0.3%	
SEM-ASI	↓	1,975.29	-0.2%	-1.1%	0.2%	
SEM-VWAP	↓	1,980.26	-0.2%	-0.8%	0.5%	
SEM10	↓	415.34	-0.2%	-1.0%	0.6%	
DEMEX	↑	238.66	0.4%	2.8%	4.1%	
Global Indices						
Japan: Nikkei 225	↑	21,318.42	0.6%	3.1%	2.1%	
US: S&P 500	↓	2,978.43	-0.01%	2.0%	3.7%	
UK: FTSE 100	↓	7,235.81	-0.6%	-0.2%	-1.3%	
Europe: Euro Stoxx 50	↓	3,495.02	-0.005%	4.8%	3.5%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	103,180.60	0.2%	-0.8%	5.5%	
Russia: MICEX	↓	2,786.63	-0.4%	4.0%	2.1%	
India: SENSEX	↑	37,145.45	0.4%	-1.2%	-6.2%	
China: Shanghai Comp	↑	3,024.74	0.8%	9.0%	7.0%	
South Africa: JSE All Share	↓	55,523.07	-0.1%	-0.02%	-4.4%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	62.59	1.7%	-18.5%	USDMUR	↓	36.67	-0.1%	4.9%
Gold	↓	1,499.13	-0.5%	25.2%	EURMUR	↑	40.50	0.05%	0.5%
Platinum	↓	947.09	-0.4%	21.1%	GBPMUR	↑	45.24	0.02%	0.4%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	286.50	287.63	9.47	36.2 m	40.9 m	-0.4%	-0.9%	1.6%
IBLL	↑	56.75	56.51	25.56	-	0.1 m	0.4%	4.1%	5.6%
SBMH	↓	5.60	5.61	11.61	-	1.0 m	-0.7%	2.2%	-17.6%
GRIT (USD)	↑	1.29	1.29	9.08	0.02 m	-	0.8%	-3.0%	-5.1%
ENL	↓	27.70	27.80	-	-	0.002 m	-1.1%	-6.9%	-10.4%
CIEL	↓	5.66	5.70	20.96	-	-	-2.1%	-7.2%	-11.6%
AFREXIM	→	4.18	4.18	7.46	-	-	-	-1.4%	-1.2%
NMH.O	→	16.00	16.00	-	-	-	-	-13.5%	-2.7%
ROGERS	→	38.90	38.90	17.68	-	0.04 m	-	-5.1%	5.9%
LUX	→	61.50	61.50	15.89	-	0.1 m	-	6.0%	9.8%
DEM Most Active (3-month average)									
ASCENCIA	→	21.25	21.25	-	-	-	-	7.9%	7.9%
LAVASTONE	→	2.74	2.74	27.40	-	-	-	-0.4%	-5.5%
EUDCOS	↑	13.75	12.54	7.99	-	-	12.7%	12.2%	-

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
16-Aug-19	VIVO	Official	Dividend	Interim	2.20	30-Aug-19	20-Sep-19
9-Aug-19	SBMH	Official	Dividend	Interim	0.10	28-Aug-19	20-Sep-19
7-Aug-19	LOTTO	Official	Dividend	Interim	0.20	21-Aug-19	21-Sep-19
19-Jul-19	FINCORP	Official	Dividend	Final	0.60	5-Aug-19	19-Aug-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

Latest Announcements

Date	Company	Details
6-Sep-19	QBL	The Boards of Directors of Quality Beverages Limited (QBL) and Margarine Industries Limited (MIL) are pleased to inform their Shareholders and the public in general that, following a Special Meeting of QBL and MIL held on 06th September 2019, the Shareholders have, by way of special resolution, unanimously approved the amalgamation proposal with respect to the proposed amalgamation of MIL with and into QBL. The shares of MIL will be cancelled and QBL will issue to the Shareholders of MIL (48) new QBL ordinary shares for every one (1) of ordinary share of MIL.

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