

### Weak leisure and investment stocks

Semdex ↓ 1,563.27      Sem-10 ↓ 292.80      Demex ↑ 204.36

The **SEMDEX** ebbs another day as it is pressured by the unanimous bearish performances of leisure and investment stocks. Hotel stock **NMH** currently sits at its all-time low of Rs4.75 (-5%) on large volumes of 142k shares as **NMH Pref** loses 0.2% to Rs9.68. **LUX** is on path for a third day decline to Rs26.10 (-5.1%) on 17k shares as leisure stock **LOTTO** contracts to Rs7.50 (-2.6%) as the company freshly issues its six months performance ending 30 Jun 2020. **LOTTO** reports an almost 50% drop in revenue for the six months ended 30 June 2020 amounting to MUR331m compared to prior corresponding period of MUR647m. The **PAT** was MUR5.1m for the six months period compared to MUR70.6m for the prior corresponding period. Investment stock **POLICY** shrinks by 4.4% to Rs4.30 with its peers being dragged down with the exception of **ROGERS** which finds a way to defy gravity ending at Rs20.80 (+1.5%).

The **SEMDEX** drops to 1,563.27 (-0.3%), with market value traded (MVT) amounting to Rs20.1m for a total volume traded (TVT) of 0.6m.

**Foreign Investors (FI)** are seller with FIS of Rs1.3m v/s FIP of Rs1.1m.

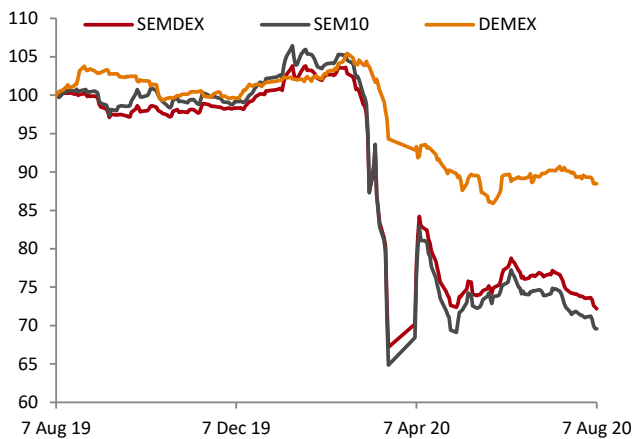
Finance: MCBG appreciates to Rs215.25 (+0.1%) while SBMH drills down to Rs3.45 (-1.4%).

**Commerce:** INNODIS falls to Rs44.15 (-0.1%).

Investments: MDIT falters Rs1.96, ENL to Rs15 (-0.7%), UTDL to Rs51.75 (-0.5%) and NIT to Rs33.50 (-0.2%).

**International equity markets:** The FTSE 100 dropped sharply on negative reaction to the Bank of England's relatively upbeat assessment of the UK economy, amid fears of a lack of fresh US stimulus.

### Market Indices: 1 year Trend (Rebased 100)



### Market Activity

Top gainers		Top losers	
ROGERS	1.5%	LUX	-5.1%
MCBGPREF	0.4%	NMH.O	-5.0%
NEWGOLD	0.4%	POLICY	-4.4%
MCBG	0.1%	LOTTO	-2.6%
		MDIT	-2.0%
Most Active (Value)		Key Market Statistics	
MCBG	11.4 m	Market Cap (Rs)	188.7 bn
NEWGOLD	3.9 m	Market Cap (USD)	4.7 bn
PBL	1.2 m	Market Div Yield	4.1%
NMH.O	0.7 m	Market P/E	12.0x
MUA	0.5 m	FI Participation	5.9%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	<span style="color:red">↓</span>	1,563.27	-0.3%	-5.8%	-2.1%	
SEM-ASI	<span style="color:red">↓</span>	1,600.25	-0.2%	-3.4%	-1.1%	
SEM-VWAP	<span style="color:red">↓</span>	1,601.22	-0.1%	-3.4%	-1.1%	
SEM10	<span style="color:red">↓</span>	292.80	-0.03%	-6.1%	-3.1%	
DEMEX	<span style="color:green">↑</span>	204.36	0.004%	-1.9%	-0.45%	
<b>Global Indices</b>						
Japan: Nikkei 225	<span style="color:red">↓</span>	22,418.15	-0.4%	-1.3%	14.3%	
US: S&P 500	<span style="color:orange">→</span>	3,327.77	-	6.3%	17.1%	
UK: FTSE 100	<span style="color:red">↓</span>	6,026.94	-1.3%	-4.1%	3.0%	
Europe: Euro Stoxx 50	<span style="color:red">↓</span>	3,240.39	-1.2%	-3.3%	13.9%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	<span style="color:green">↑</span>	104,125.64	1.3%	5.2%	31.7%	
Russia: MICEX	<span style="color:red">↓</span>	2,988.50	-0.1%	5.4%	12.7%	
India: SENSEX	<span style="color:green">↑</span>	38,025.45	1.0%	4.2%	20.0%	
China: Shanghai Comp	<span style="color:green">↑</span>	3,386.46	0.3%	1.6%	17.7%	
South Africa: JSE All Share	<span style="color:green">↑</span>	57,656.69	0.0%	5.1%	15.7%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	45.09	-0.2%	-23.5%	USDMUR	→	40.15	-	10.9%
Gold	↑	2,063.81	1.1%	40.0%	EURMUR	↓	47.60	-0.4%	17.3%
Platinum	↑	1,002.07	3.3%	17.5%	GBPMUR	↓	52.74	-0.2%	19.9%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	215.25	215.00	5.42	0.2 m	0.6 m	0.1%	-7.8%	-2.2%
IBLL	→	46.50	46.50	73.81	-	-	-	-6.1%	3.3%
SBMH	↓	3.45	3.45	594.83	-	0.2 m	-1.4%	-10.2%	-49.3%
GRIT (USD)	→	0.77	0.77	7.95	-	-	-	2.7%	-1.3%
ENL	↓	15.00	15.00	5.30	0.07 m	0.2 m	-0.7%	-14.5%	-17.1%
CIEL	→	3.10	3.10	-	-	-	-	-8.8%	-15.1%
ALTEO	→	15.00	15.00	-	-	-	-	-9.1%	11.1%
MEDINE	→	40.00	40.00	16.33	-	-	-	-12.1%	-14.9%
ROGERS	↑	20.80	20.89	9.45	-	0.04 m	1.5%	-7.1%	-13.2%
VIVO	→	225.00	225.00	17.01	-	-	-	1.1%	2.3%
<b>DEM Most Active (3-month average)</b>									
LAVASTONE	→	1.37	1.37	3.91	-	0.09 m	-	0.7%	-2.1%
SEMARIS	→	1.00	1.00	5.26	-	0.0 m	-	-22.5%	-13.0%
EUDCOS	→	10.25	10.25	11.78	-	-	-	-5.1%	-13.1%

### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
11-Jun-20	INNODIS	Official	Dividend	Final	0.30	26-Aug-20	25-Sep-20
25-Jun-20	EUDCOS	DEM	Dividend	Final	0.25	10-Jul-20	7-Sep-20
30-Jun-20	NOVUS	DEM	Dividend	Final	0.21	15-Jul-20	5-Aug-20
26-Jun-20	ALTEO	Official	Dividend	Final	0.22	14-Jul-20	31-Jul-20
12-Jun-20	LFL	DEM	Dividend	Final	1.20	29-Jun-20	30-Jul-20

### Latest Announcements

Date	Company	Details
31-Jul-20	SBMH	Board of Directors of SBM Holdings Ltd wishes to inform its Shareholders and the public in general that following the Annual Meeting of SBMH held today, the Board of Directors of SBMH has been reconstituted as follows: 1. Mr Abdul Sattar Adam Ali Mamode Hajee Abdoula - Chairman 2. Mr Jean Paul Emmanuel Arouff 3. Ms Shakilla Bibi Jhungeer 4. Mr Roodesh Muttylall 5. Ms Sharon Ramdenee 6. Mr Visvanaden Soondram 7. Mr Subhas Thecka.

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