

### Banks and Hotels drive the market

Semdex ↑ 1,560.49      Sem-10 ↑ 291.66      Demex ↓ 202.11

The **SEMDEX** consolidates further driven by banking and hotel stocks intensifying their progression, **MCBG** on just 47k shares ascends to Rs220.25 (+1.3%) while its peer **SBMH** fares better by 3.2% to Rs3.55 on large volumes of 1.4m units traded. **NMH** pursues its rally to Rs4.56 (+1.3%) while its Preference issue tumbles by 5.3% to Rs9. **SUN** brightens its sentiment rising to Rs13.85 (+4.9%). Adding to the index strength is **CIEL** appreciating by 3.2% to Rs3.20. A different scenario on the DEM, with banking stock **ABC** inching down by 1.6% to Rs19 on 204k units as well as **ASCENCIA** trimming 1.2% to Rs16.70. Only **EUDCOS** rises to Rs10.40 (+1.5%), yet not aiding the **DEMEX** from finishing in the red.

The **SEMDEX** rises to 1,560.49 (+0.6%), with market value traded (MVT) amounting to Rs20.5m for a total volume traded (TVT) of 1.7m.

**Foreign Investors (FI)** are buyer with FIS of Rs7.9m v/s FIS of Rs5.0m.

**Commerce:** IBL weakens to Rs43.55 (-0.1%). VIVO rises to Rs226.75 (+0.1%).

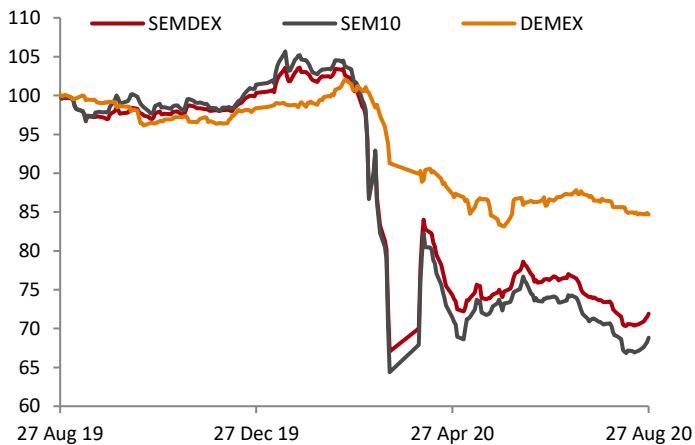
**Investments:** CAUDAN drops to Rs0.95 (-4%), MDIT to Rs1.95 (-2%), POLICY to Rs4.36 (-1.4%) and ROGERS to Rs20.40 (-0.3%).

**Leisure:** LOTTO recovers to Rs7.50 (+0.5%).

**PD:** BLUELIFE tumbles to Rs1.08 (-1.8%).

**International equity markets:** The FTSE 100 closes just a notch higher ahead of a key Federal Reserve meeting and as Gatwick airport cuts 600 jobs across the business, about 25% employees.

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



### Market Activity

Top gainers		Top losers	
SUN	4.9%	NMH.P	-5.3%
CIEL	3.2%	CAUDAN	-4.0%
SBMH	3.2%	MDIT	-2.0%
NMH.O	1.3%	BLUELIFE	-1.8%
MCBG	1.3%	POLICY	-1.4%
Most Active (Value)		Key Market Statistics	
MCBG	10.2 m	Market Cap (Rs)	188.4 bn
SBMH	4.8 m	Market Cap (USD)	4.7 bn
VIVO	1.5 m	Market Div Yield	3.8%
TERRA	1.3 m	Market P/E	11.7x
ENL	0.8 m	FI Participation	31.6%

Summary Market Data	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>					
SEMDEX	<span style="color: green;">↑</span> 1,560.49	0.6%	-2.4%	-3.5%	
SEM-ASI	<span style="color: green;">↑</span> 1,594.34	0.4%	-1.9%	-2.6%	
SEM-VWAP	<span style="color: green;">↑</span> 1,594.04	0.3%	-2.0%	-2.6%	
SEM10	<span style="color: green;">↑</span> 291.66	0.8%	-2.9%	-5.8%	
DEMEX	<span style="color: red;">↓</span> 202.11	-0.2%	-2.1%	1.59%	
<b>Global Indices</b>					
Japan: Nikkei 225	<span style="color: red;">↓</span> 23,290.86	-0.03%	2.4%	9.5%	
US: S&P 500	<span style="color: green;">↑</span> 3,478.73	1.0%	8.2%	16.3%	
UK: FTSE 100	<span style="color: green;">↑</span> 6,045.60	0.1%	-1.3%	-0.4%	
Europe: Euro Stoxx 50	<span style="color: green;">↑</span> 3,356.76	0.8%	1.4%	11.9%	
<b>Emerging Market Indices</b>					
Brazil: IBOVESPA	<span style="color: red;">↓</span> 100,627.3	-1.5%	-1.7%	17.7%	
Russia: MICEX	<span style="color: green;">↑</span> 3,051.97	0.8%	6.6%	10.8%	
India: SENSEX	<span style="color: green;">↑</span> 39,073.92	0.6%	2.5%	27.7%	
China: Shanghai Comp	<span style="color: red;">↓</span> 3,329.74	-1.3%	4.2%	17.0%	
South Africa: JSE All Share	<span style="color: green;">↑</span> 56,572.24	0.8%	1.7%	11.8%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	45.64	-0.5%	-22.2%	USDMUR	40.20	-0.12%	10.1%
Gold	↑	1,953.45	1.3%	27.9%	EURMUR	47.66	-0.0%	17.6%
Platinum	↑	928.83	0.2%	8.5%	GBPMUR	53.22	0.5%	19.4%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	220.25	219.28	5.55	6.18 m	1.8 m	1.3%	-1.1%	-4.7%
IBLL	↓	43.55	43.56	69.13	0.002 m	-	-0.1%	-9.3%	-8.3%
SBMH	↑	3.55	3.50	612.07	1.8 m	2.1 m	3.2%	3.8%	-47.8%
GRIT (USD)	→	0.75	0.53	-	-	-	-	-2.6%	-3.8%
ENL	→	16.00	16.00	5.65	-	-	-	9.6%	-17.5%
CIEL	↑	3.20	3.16	-	0.01 m	-	3.2%	3.2%	-8.6%
ALTEO	→	14.55	14.55	-	-	-	-	-3.0%	1.0%
MEDINE	→	38.90	38.91	15.88	-	-	-	-14.4%	-11.6%
ROGERS	↓	20.40	20.26	9.27	-	-	-0.5%	-7.3%	3.3%
VIVO	↑	226.75	226.09	17.14	-	-	0.1%	0.8%	3.1%

#### DEM Most Active (3-month average)

ABC Bank	↓	19.00	19.00	6.46	-	0.06 m	-1.6%	-3.6%	-5.0%
EUDCOS	↑	10.40	10.10	11.95	0.002 m	-	1.5%	-5.5%	4.0%
SEMARIS	→	0.99	0.99	5.21	-	0.04 m	-	-1.0%	-2.9%

#### 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

#### Latest Announcements

Date	Company	Details
21-Aug-20	ASCENCIA	Further to its communiqué dated 07 July 2020, the board of directors of Ascencia Limited (the 'Company') wishes to inform its shareholders and the public that the Special Meeting of Shareholders of the Company to approve its Bond Programme shall be held on 16 September 2020. The notice of the said meeting will be published on the website of the Company.
14-Aug-20	MUA	The Board of Directors of MUA Ltd wishes to inform its shareholders and the public that it has on this date considered and approved a Rights Issue to existing shareholders, for an amount of MUR415.8 million, representing 5,010,000 of new ordinary shares, in the proportion of 1 new ordinary share for every 9 ordinary shares held, at a price of MUR83.00 per share. The Rights Issue is subject to the approval of the relevant authorities. The purpose of the capital raising is to refinance the acquisition of Saham Assurance Kenya Limited.

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