

Conglomerates on the rise

Semdex ↑ 1,637.84 Sem-10 ↑ 307.38 Demex ↑ 214.21

Conglomerates boost the **SEMDEX** as **IBL** progresses to Rs48 (+2.1%) and **CIEL** moves up to Rs3.68 (+1.7%) on small volumes of 7.4k shares. Banking stocks close in opposite directions with **MCBG** down at Rs236 (-0.8%) while **SBMH** ascends to Rs3.40 (+1.5%). **HML** makes a steep drop by 7.1% to Rs65 on just 100 units exchanged while its commerce peer **VIVO** climbs to Rs220 (+3%). Leisure stocks also close mixed with **ASL** appreciating to Rs91 (+3.1%) on 100 shares while **LOTTO** dips to Rs9.36 (-0.4%). **SUN** rises to Rs13.80 (+0.4%). On the DEM, **C-CARE** is on its third winning streak posting gains of 7.2% to Rs8, implying Rs2 appreciation over the last four sessions. **COVIFRA** mounts to Rs20 (+0.8%) and **EUDCOS** to Rs12.95 (+2.8%) while **ASCENCIA** falls to Rs17.30 (-0.9%).

The **SEMDEX** rises to 1,6137.84 (+0.2%), with market value traded (MVT) amounting to Rs17.0m for a total volume traded (TVT) of 1m.

Foreign Investors (FI) are seller with FIS of Rs7.8m and FIP of Rs0.3m.

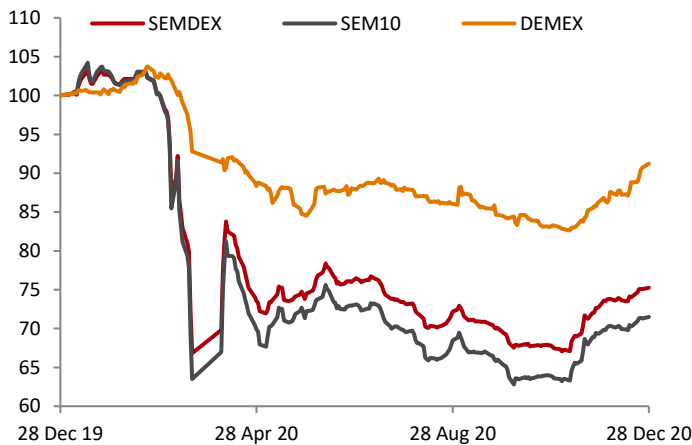
Industry: GAMMA rises to Rs28.85 (+0.4%).

Investments: ALTEO falls to Rs20.70 (-1.4%), MDIT to Rs2.30 (-1.3%), CAUDAN to Rs0.96 (-1%) and BMH to Rs24.25 (-1%). POLICY climbs to Rs3.99 (+0.3%), TERRA to Rs19.65 (+0.8%) and PAD to Rs77 (+1.3%).

Sugar: OMNICANE drops to Rs15 (-0.7%).

International equity markets: The FTSE 100 finishes higher in a shortened session ahead of the Christmas holiday, as an imminent Brexit trade deal tempered worries about rising coronavirus cases.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
ASL	3.1%	H MALLAC	-7.1%
IBLL	2.1%	IBL NOTE S3	-3.7%
CIEL	1.7%	MCBGPREF	-1.7%
SBMH	1.5%	ALTEO	-1.4%
VIVO	1.4%	MDIT	-1.3%
Most Active (Value)		Key Market Statistics	
PBL	1.1 m	Market Cap (Rs)	198.2 bn
IBL NOTE S3	1.0 m	Market Cap (USD)	5.0 bn
ROGERS	0.6 m	Market Div Yield	2.3%
LOTTO	0.5 m	Market P/E	11.4x
SUN FRN5Y	0.5 m	FI Participation	23.8%

Summary Market Data	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	↑ 1,637.84	0.2%	3.3%	8.2%	
SEM-ASI	↑ 1,635.91	0.03%	2.2%	4.7%	
SEM-VWAP	↑ 1,638.35	0.1%	2.5%	4.8%	
SEM10	↑ 307.38	0.3%	3.1%	9.3%	
DEMEX	↑ 214.21	0.6%	5.7%	7.93%	
Global Indices					
Japan: Nikkei 225	↑ 26,668.35	0.5%	1.9%	15.5%	
US: S&P 500	↑ 3,703.06	0.4%	1.9%	14.1%	
UK: FTSE 100	↑ 6,502.10	0.1%	1.1%	11.7%	
Europe: Euro Stoxx 50	→ 3,539.26	-	0.9%	12.0%	
Emerging Market Indices					
Brazil: IBOVESPA	→ 117,857.0	-	7.4%	21.5%	
Russia: MICEX	↓ 3,236.88	-0.5%	4.6%	11.1%	
India: SENSEX	↑ 46,973.54	1.1%	5.5%	25.6%	
China: Shanghai Comp	↓ 3,363.11	-0.6%	-1.2%	4.3%	
South Africa: JSE All Share	↑ 59,175.80	0.3%	2.4%	9.1%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	51.29	0.2%	-23.7%	USDMUR	→	39.85	-	7.8%
Gold	↑	1,876.56	0.2%	25.2%	EURMUR	↑	48.75	0.0%	18.7%
Platinum	↑	1,023.89	0.9%	8.5%	GBPMUR	↑	54.15	0.1%	12.7%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	236.00	237.78	7.13	0.03 m	6.7 m	-0.8%	-1.3%	11.8%
IBLL	↑	48.00	47.71	-	0.002 m	-	2.1%	7.9%	9.1%
SBMH	↑	3.40	3.37	586.21	0.002 m	-	1.5%	1.5%	-50.0%
TERRA	↑	19.65	19.65	16.94	-	-	0.8%	1.8%	1.3%
ENL	→	15.00	15.00	5.30	0.002 m	0.09 m	-	10.3%	11.1%
CIEL	↑	3.68	3.68	-	0.005 m	0.01 m	1.7%	15.4%	15.0%
ALTEO	↓	20.70	20.70	-	0.002 m	-	-1.4%	8.7%	41.3%
PBL	→	590.00	590.00	21.75	-	-	-	-	1.7%
ROGERS	→	22.00	22.00	10.00	-	0.178 m	-	11.7%	6.8%
VIVO	↑	220.00	219.50	16.63	-	0.23 m	1.4%	-0.5%	-3.1%

DEM Most Active (3-month average)

ABC Bank	→	17.50	17.50	11.08	-	-	-	14.0%	-
LAVASTONE	↓	1.55	1.55	-	0.01 m	-	-1.3%	-8.3%	14.8%
EUDCOS	↑	12.95	12.73	8.58	-	-	2.8%	7.9%	27.0%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
3-Dec-20	IBLL	Official	Dividend	Interim	0.11	18-Dec-20	30-Dec-20
13-Nov-20	MUA	Official	Dividend	Final	2.02	1-Dec-20	18-Dec-20
10-Nov-20	PHIN	DEM	Dividend	Interim	3.36	25-Nov-20	18-Dec-20
10-Nov-20	PBL	Official	Dividend	Interim	4.00	25-Nov-20	16-Dec-20

Latest Announcements

Date	Company	Details
12-Nov-20	SBMH	SBM Holdings Ltd wishes to inform its shareholders and the public in general that Mr. Parvataneni Venkateshwara Rao has submitted his resignation as Chief Executive Officer of SBMBM effective 01 January 2021. He shall be on garden leave as from 16 November 2020. The Board of Directors of SBMBM has already initiated the search for his replacement. In the interim, Mr. Jorge Stock, who is presently the Chief Operating Officer of SBMBM, has been appointed as Officer-in-Charge and his appointment will take effect as from 16 November 2020.
12-Oct-20	OMNICANE	The Board of Directors ("The Board") of Omnicane Limited ("Omnicane", "The Company") wishes to inform its shareholders and the public at large that it has decided to appoint Mr Harold Mayer as Chairman of the Company in replacement of Mr Didier Maigrot who expressed the wish to step down as Chairman whilst remaining a member of the Board as Non-Executive Director.

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