

Finance stocks in focus

Semdex 1,642.14 Sem-10 308.20 Demex 214.83

Finance stocks, together with investment stocks, tilt up and fuel the **SEMDEX**. **MCBG** finishes up at Rs237 (+0.4%) on 29k shares as its peers **SBMH** drives up by 3.5% to Rs3.52. **CIM** progresses with its ascent closing at Rs6.42 as the financial services group freshly releases its financial results for the year ending 30 Sep 2020. The Group's Net Operating Income from continuing operations increased (+15%) to reach Rs2.1bn whilst **PAT** decreased by 50% to Rs90.8m overall for the year under review. primarily due to an increase in allowance for credit impairment to reach Rs652.6m (FY19: Rs180.9m) due to the uncertain economic outlook. After a one-day rise, **IBL** steps back to Rs47.50 while **NMH** pursue its steady rise to Rs5.44 (+3.4%), after kicking off the month at Rs4.75. On the DEM, banking stock **ABC** also flashes up by 2.9% to Rs18 on simply 100 units as **UTIN** soars by 6.6% to Rs4.50.

Foreign Investors (FI) are buyer with FIP of Rs1.5m and FIS of Rs0.2m.

Investments: ALTEO rises to Rs20.75 (+0.2%), POLICY to Rs24 (+0.3%), ENL to Rs15.10 (+0.7%), CIEL to Rs3.70 (+0.5%) and TERRA to Rs19.80 (+0.8%).

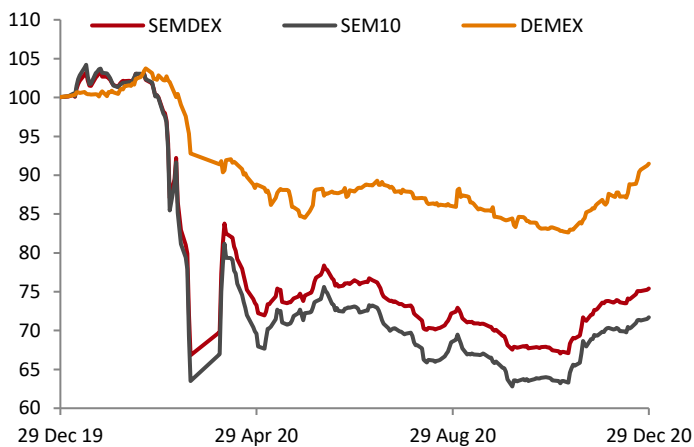
Leisure: ASL dips to Rs86 (-5.5%) and LOTTO to Rs9.30 (-0.6%).

Sugar: OMNICANE ascends to Rs15.10 (+0.7%).

International equity markets: The S&P 500 rose to fresh records Monday as markets cheered enactment of the latest economic relief package.

The **SEMDEX** rises to 1,6142.14 (+0.3%), with market value traded (MVT) amounting to Rs26.2m for a total volume traded (TVT) of 1.3m.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
SBMH	3.5%	ASL	-5.5%
NMH.O	3.4%	IBLL	-1.0%
FINCORP	2.8%	LOTTO	-0.6%
ADBF	0.9%		
TERRA	0.8%		
Most Active (Value)		Key Market Statistics	
CIM	1.9 m	Market Cap (Rs)	198.7 bn
GRIT (USD)	1.5 m	Market Cap (USD)	5.0 bn
SBMH	1.1 m	Market Div Yield	2.3%
NIT	0.9 m	Market P/E	11.6x
POLICY	0.9 m	FI Participation	3.3%

Summary Market Data

	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	1,642.14	0.3%	3.6%	8.8%	
SEM-ASI	1,639.13	0.2%	2.4%	5.1%	
SEM-VWAP	1,638.90	0.0%	2.5%	5.1%	
SEM10	308.20	0.3%	3.4%	9.9%	
DEMEX	214.83	0.3%	6.0%	8.41%	
Global Indices					
Japan: Nikkei 225	27,568.15	3.4%	3.5%	17.3%	
US: S&P 500	3,735.36	0.9%	2.7%	11.5%	
UK: FTSE 100	6,502.10	-	2.1%	9.7%	
Europe: Euro Stoxx 50	3,575.41	1.0%	1.3%	10.9%	
Emerging Market Indices					
Brazil: IBOVESPA	119,051.0	1.0%	7.7%	25.8%	
Russia: MICEX	3,258.95	0.7%	3.7%	11.3%	
India: SENSEX	47,353.75	0.8%	7.3%	24.7%	
China: Shanghai Comp	3,397.28	1.0%	-0.3%	5.6%	
South Africa: JSE All Share	59,006.07	-0.3%	2.0%	7.8%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	50.86	-0.8%	-25.1%	USDMUR	→	39.85	-	7.8%
Gold	↓	1,871.19	-0.3%	23.8%	EURMUR	↑	48.87	0.2%	19.0%
Platinum	↑	1,031.00	0.7%	9.0%	GBPMUR	↓	53.86	-0.5%	12.1%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	237.00	236.03	7.16	-	-	0.4%	-0.8%	12.2%
IBLL	↓	47.50	47.50	-	0.002 m	-	-1.0%	6.7%	8.0%
SBMH	↑	3.52	3.52	606.90	-	-	3.5%	5.1%	-48.2%
TERRA	↑	19.80	19.80	17.07	-	-	0.8%	2.6%	2.3%
ENL	↑	15.10	15.05	5.34	-	0.10 m	0.7%	11.0%	7.9%
CIEL	↑	3.70	3.69	-	0.01 m	0.12 m	0.5%	16.0%	21.3%
ALTEO	↑	20.75	20.75	-	-	-	0.2%	8.9%	43.1%
PBL	→	590.00	590.00	21.75	-	-	-	-	1.5%
ROGERS	→	22.00	21.99	10.00	-	-	-	11.7%	8.4%
VIVO	→	220.00	220.00	16.63	-	-	-	-0.5%	-3.1%
DEM Most Active (3-month average)									
SEMARIS	→	1.00	1.00	-	0.03 m	-	-	-	1.0%
LAVASTONE	→	1.55	1.55	-	-	-	-	-8.3%	14.8%
EUDCOS	↑	13.00	12.99	8.61	-	-	0.4%	8.3%	27.5%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
8-Dec-20	SWAN GEN	Official	Dividend	Final	14.40	23-Dec-20	15-Jan-21
10-Dec-20	ASCENCIA	DEM	Dividend	Interim	0.17	28-Dec-20	14-Jan-21
9-Dec-20	ALTEO	Official	Dividend	Interim	0.32	28-Dec-20	14-Jan-21
3-Dec-20	IBLL	Official	Dividend	Interim	0.11	18-Dec-20	30-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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For trading please contact:

Ashveen Chummun T: (+230) 202 5776
Derek Sum Ping T: (+230) 202 5456
Khamlesh Beeharry T: (+230) 202 6063

E: mcbsb@mcbscm.mu
MCB Stockbrokers Ltd
Sir W. Newton St, Port Louis
www.mcbscm.mu