MCB Capital Markets

Market status quo prevails

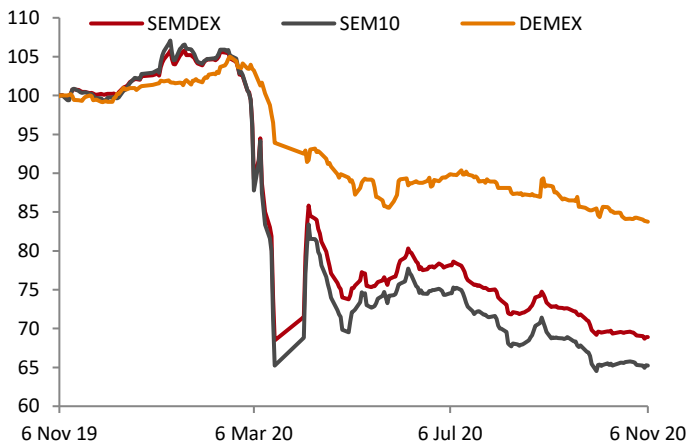| Semdex	🔼	1,464.04	Sem-10	🔽	272.99	Demex	🔽	194.29

The **SEMDEX** barely nudges as movements on both winners and shakers offset each other. Hotels stocks are mixed with contrasting movement observed from **NMH** falling by 2.1% to Rs4.75 with **LUX** climbing by 2.1% to Rs24. Similar situation from banking stocks with **MCBG** descending by 0.2% to Rs206.50 and **SBMH** ascending by 1% to Rs3.15. Investments stocks surge with **ALTEO** mounting to Rs15.90 (+0.3%) and **MDIT** jumping by 0.5% to Rs1.92. On the **DEM**, the downturn persists for **LAVASTONE** coming down to Rs1.26 (-3.1%) and **SEMARIS** at Rs0.98 (-1%).

The **SEMDEX** meagerly rises to 1,464.04 (+0.003%), with market value traded (MVT) amounting to Rs22.6m for a total volume traded (TVT) of 0.3m.

Foreign Investors (FI) are seller with FIS of Rs12.8m vs FIP of Rs12.7m.

International equity markets: The S&P 500 surged on track for its sharpest weekly gains since April, as investors cheered the diminished prospects of higher corporate taxes under a split Congress.

Market Indices: 1 year Trend (Rebased 100)

Market Activity

Top gainers		Top losers	
LUX	2.1%	NMH.O	-2.1%
SBMH	1.0%	MCBG	-0.2%
ADBF	0.9%	MUA	0.0%
MDIT	0.5%	MCBGPREF	0.0%
		CIM	0.0%

Most Active (Value)		Key Market Statistics	
MCBG	19.6 m	Market Cap (Rs)	177.1 bn
PAD	0.8 m	Market Cap (USD)	4.4 bn
SBM BD A2	0.5 m	Market Div Yield	3.2%
GAMMA	0.4 m	Market P/E	12.3x
SBMH	0.4 m	FI Participation	56.5%

Summary Market Data

Summary Market Data		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	🔼	1,464.04	0.003%	-1.0%	-6.6%	
SEM-ASI	🔼	1,508.40	0.1%	-1.7%	-5.9%	
SEM-VWAP	🔼	1,509.76	0.2%	-1.4%	-5.8%	
SEM10	🔽	272.99	-0.0%	-0.1%	-6.8%	
DEMEX	🔽	194.29	-0.1%	-1.0%	-4.93%	
Global Indices						
Japan: Nikkei 225	🔼	24,105.28	1.7%	3.4%	7.1%	
US: S&P 500	🔼	3,510.45	1.9%	3.0%	5.5%	
UK: FTSE 100	🔼	5,906.20	0.4%	-0.6%	-3.3%	
Europe: Euro Stoxx 50	🔼	3,215.56	1.7%	-0.1%	-1.9%	
Emerging Market Indices						
Brazil: IBOVESPA	🔼	100,774.0	3.0%	4.9%	-2.0%	
Russia: MICEX	🔼	2,861.39	2.7%	-0.7%	-4.4%	
India: SENSEX	🔼	41,340.16	0.4%	6.1%	9.8%	
China: Shanghai Comp	🔼	3,320.13	1.3%	3.2%	-1.7%	
South Africa: JSE All Share	🔼	55,225.24	2.9%	1.3%	-4.2%	

Commodities		Closing	1D Δ	12M Δ	Currencies		Closing	1D Δ	12M Δ
Oil (Brent)	↓	40.93	-0.7%	-35.0%	USDMUR	↓	40.30	-0.12%	9.4%
Gold	↑	1,948.56	2.4%	31.3%	EURMUR	↑	47.74	0.6%	17.0%
Platinum	↑	892.73	2.7%	-3.9%	GBPMUR	↑	53.00	1.2%	11.7%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	1D Δ	1M Δ	3M Δ
SEM-10									
MCBG	↓	206.50	206.50	6.24	12.7 m	12.8 m	-0.2%	0.7%	-4.1%
IBLL	⇒	43.00	43.00	68.25	-	0.01 m	-	2.4%	-7.5%
SBMH	↑	3.15	3.14	543.10	-	-	1.0%	-3.1%	-53.7%
TERRA	⇒	18.30	18.30	15.78	-	-	-	-3.7%	-8.0%
ENL	⇒	13.00	13.00	4.59	-	-	-	-3.7%	-13.3%
CIEL	⇒	2.85	2.85	-	-	-	-	-8.1%	-8.1%
ALTEO	↑	15.90	15.88	-	-	-	0.3%	10.0%	6.0%
PBL	⇒	573.00	573.00	21.12	-	-	-	-1.2%	-4.2%
ROGERS	⇒	19.50	19.50	8.86	-	-	-	-5.8%	-6.3%
VIVO	⇒	220.00	220.00	16.63	-	-	-	-3.1%	-2.2%
DEM Most Active (3-month average)									
SEMARIS	↓	0.98	0.98	5.16	-	-	-1.0%	-1.0%	-2.0%
PHIN	⇒	370.00	370.00	15.53	0.04 m	-	-	-5.1%	-12.5%
LMLC.O	⇒	210.00	210.25	17.75	-	-	-	-	-0.9%

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
22-Sep-20	C-CARE	DEM	Dividend	Final	0.20	7-Oct-20	23-Oct-20

Latest Announcements

Date	Company	Details
8-Oct-20	SUN	The Board of Directors of SUN wishes to inform its shareholders and the public in general that it has sought the support of the Mauritius Investment Corporation Ltd ("MIC"), to mitigate the negative impact of COVID-19. Summary terms are as follows: Redeemable and convertible secured bonds each having a nominal value of MUR 10,000,000 to be issued by two of the Company's wholly owned subsidiaries: Anahita Hotel Limited and Long Beach Resort Ltd. The total subscription amount in Bonds is MUR 3,100,000,000, carrying a fixed interest rate with interest payable semi-annually and maturing on the 9th anniversary of the date of issue of the Bonds to MIC
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.