

SEMDEX kicks off strong

Semdex 1,509.57 Sem-10 283.06 Demex 197.08

The **SEMDEX** recovers from a weak Friday and starts off the week on strong performances observes in finance, investments and property development sectors. Banking giant **MCBG** moves up to Rs220 (+0.8%) on 15k shares as the group published its Q1 FY21 results on Friday. The group posted lower profitability of Rs1.9bn (-23.6%) despite an increase in Operating Income to Rs5.4bn (+3.3%), primarily impacted by the increase in impairment charges. **SBMH**, however, trims down to Rs3.09 (-0.3%). **MUA** also strengthen its position at Rs86 (+0.6%) and **CIM** at Rs6.14 (+1.7%). Investment stocks largely close on a bullish mood with **CIEL** surging by 4% to Rs3.12, but on tiny volumes of 250 units, **ALTEO** progressing further to Rs17 (+2.4%) while **ENL** adds 0.8% to Rs13.10. Biggest gainer for the session, **BLUELIFE**, recovers to Rs0.90 (+7.1%) again on small volumes of 200 shares. Big swings noted on the **DEM** with **LFL** jumping by 19.1% to Rs53 and **SEMARIS** back to Rs1 (+4.2%).

The **SEMDEX** rises to 1,509.57 (+0.5%), with market value traded (MVT) amounting to Rs7.7m for a total volume traded (TVT) of 0.7m.

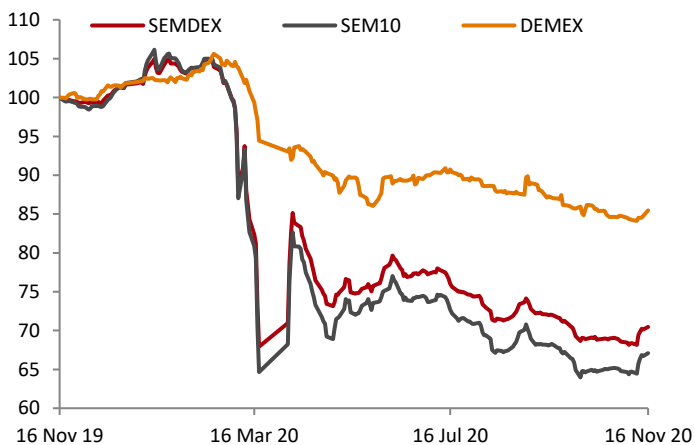
Foreign Investors (FI) are seller with FIS of Rs1.6m vs FIS of Rs1.1m.

Commerce&Industry: IBL descends to Rs43.95 (-0.1%) and GAMMA falls to Rs26.90 (-0.4%).

Investments: POLICY advances to Rs3.42 (+0.6%), MEDINE to Rs32 (+1%) and MDIT to Rs2.25 (+2.3%).

International equity markets: The S&P 500 closed at record high as investors cheered progress toward a COVID-19 vaccine, while seeming to look past a continued rise in new cases.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BLUELIFE	7.1%	GAMMA	-0.4%
CIEL	4.0%	SBMH	-0.3%
ALTEO	2.4%	IBLL	-0.1%
MDIT	2.3%	VIVO	0.0%
CIM	1.7%	BOM GJB	0.0%
Most Active (Value)		Key Market Statistics	
MCBG	3.3 m	Market Cap (Rs)	182.6 bn
SBMH	1.3 m	Market Cap (USD)	4.6 bn
MCB 5Y	0.9 m	Market Div Yield	3.0%
POLICY	0.5 m	Market P/E	12.7x
GAMMA	0.4 m	FI Participation	17.4%

Summary Market Data

	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	1,509.57	0.5%	2.4%	-1.5%	
SEM-ASI	1,545.82	0.4%	1.5%	-2.0%	
SEM-VWAP	1,546.47	0.3%	1.4%	-2.0%	
SEM10	283.06	0.5%	3.6%	-0.6%	
DEMEX	197.08	0.8%	0.1%	-2.71%	
Global Indices					
Japan: Nikkei 225	25,385.87	-0.5%	7.8%	9.2%	
US: S&P 500	3,585.15	1.4%	1.4%	6.3%	
UK: FTSE 100	6,316.40	-0.4%	5.2%	2.1%	
Europe: Euro Stoxx 50	3,432.07	0.1%	4.1%	2.7%	
Emerging Market Indices					
Brazil: IBOVESPA	104,512.0	2.3%	7.2%	4.0%	
Russia: MICEX	3,025.22	-0.0%	6.3%	-1.8%	
India: SENSEX	43,443.00	0.2%	7.0%	13.4%	
China: Shanghai Comp	3,310.10	-0.9%	-1.4%	-0.3%	
South Africa: JSE All Share	57,182.60	0.3%	2.9%	-0.4%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	42.78	-1.7%	-31.4%	USDMUR	↓	40.25	-0.12%	8.8%
Gold	↑	1,888.04	0.7%	29.0%	EURMUR	↑	47.80	0.3%	17.4%
Platinum	↑	888.79	1.0%	1.5%	GBPMUR	↑	53.34	0.7%	12.2%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	220.00	219.64	6.65	1.0 m	1.1 m	0.8%	8.0%	4.5%
IBLL	↓	43.95	43.95	69.76	-	-	-0.1%	2.2%	1.7%
SBMH	↓	3.09	3.09	532.76	-	-	-0.3%	-4.9%	-54.6%
TERRA	→	18.75	18.75	16.16	-	-	-	2.5%	-5.5%
ENL	↑	13.10	13.10	4.63	-	-	0.8%	-1.5%	-12.7%
CIEL	↑	3.12	3.12	-	-	-	4.0%	2.0%	-2.5%
ALTEO	↑	17.00	16.84	-	0.1 m	-	2.4%	18.1%	17.2%
PBL	→	573.00	573.00	21.12	-	-	-	-1.2%	-4.2%
ROGERS	→	19.80	19.80	9.00	-	-	-	-2.5%	-1.5%
VIVO	→	220.00	220.00	16.63	-	-	-	-3.1%	-2.3%

DEM Most Active (3-month average)

SEMARIS	↑	1.00	1.00	5.26	0.03 m	-	4.2%	1.0%	1.0%
LFLO	↑	53.00	53.19	9.36	0.06 m	-	19.1%	20.5%	18.3%
EUDCOS	↑	10.90	10.98	7.22	-	-	3.8%	10.1%	6.3%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
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
29-Oct-20	NIT	Official	Dividend	Final	1.00	17-Nov-20	11-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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