

SUN shines bright

Semdex	↓	1,477.94	Sem-10	↑	273.41	Demex	↓	195.66
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The stock market ends the day with negative sentiment prevailing over banking stocks while hotel stocks realise good gains. **SUN** jumps as high as 8.8% to Rs15.50 on 900 shares while its peer **NMH** puts on 1.6% to finish at Rs5.20. On the same theme, **NMHPREF** appreciates to Rs9.04 (+0.2%) on 2.3k shares. Banking giant **MCBG** inches down to Rs205 (-0.5%) as **SBMH** dips to Rs85 (-1.2%). **MUA** rights drop to Rs2 (-33%). Outgoing SEM-10 constituent, **MEDINE**, falls deeply by 8.8% to Rs30 on 8.8k shares. In terms of recovery, **ENL** departs from its all-time low status and mounts to Rs13.5 (+3.8%) and **ROGERS** posts slight gains to Rs20.70 (+2%). On the **DEM**, **CHSL** tanks by 7.7% to Rs12 while **EUDCOS** moves south to Rs9.90 (-1%).

The **SEMDEX** drops to 1,477.94 (-0.1%), with market value traded (MVT) amounting to Rs11.6m for a total volume traded (TVT) of 0.8m.

Foreign Investors (FI) are seller with FIS of Rs4.7m vs FIP of Rs0.09m.

Commerce: INNODIS appreciates to Rs43 (+0.1%).

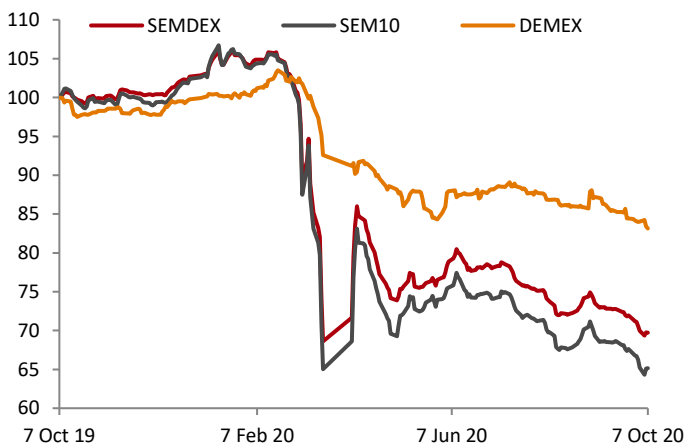
Industry: GAMMA rises to Rs26.05 (+0.2%) while MOROIL drops to Rs20 (-4.1%).

Investments: POLICY dips to Rs3.90 (-2.5%) and FINCORP dips to Rs15.60 (-2.5%).

PD: BLUELIFE falls to Rs0.95 (-1%).

International equity markets: The FTSE 100 ended the day broadly flat, as Rishi Sunak replied he aims at saving jobs when asked about the possibility of tax rises to pay for the soaring cost of the coronavirus.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
SUN	8.8%	MEDINE	-8.8%
ENL	3.8%	MOROIL	-4.1%
ROGERS	2.0%	FINCORP	-2.5%
NMH.O	1.6%	POLICY	-2.5%
NMH.P	0.2%	MUA	-1.2%
Most Active (Value)		Key Market Statistics	
MCBG	8.2 m	Market Cap (Rs)	178.8 bn
SBMH	1.1 m	Market Cap (USD)	4.5 bn
MCBGPREF	0.7 m	Market Div Yield	3.4%
MEDINE	0.3 m	Market P/E	12.1x
LOTTO	0.2 m	FI Participation	21.8%

Summary Market Data

	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	↓ 1,477.94	-0.1%	-4.4%	-10.9%	
SEM-ASI	↓ 1,532.65	-0.1%	-3.4%	-7.6%	
SEM-VWAP	↑ 1,535.31	0.3%	-3.4%	-7.4%	
SEM10	↑ 273.41	0.04%	-4.9%	-12.3%	
DEMEX	↓ 195.66	-0.3%	-4.5%	-6.11%	
Global Indices					
Japan: Nikkei 225	↑ 23,433.73	0.5%	1.0%	3.2%	
US: S&P 500	↓ 3,360.97	-1.4%	-1.9%	5.7%	
UK: FTSE 100	↑ 5,949.90	0.1%	2.6%	-5.3%	
Europe: Euro Stoxx 50	↑ 3,233.30	0.4%	-0.8%	-3.5%	
Emerging Market Indices					
Brazil: IBOVESPA	↓ 95,615.0	-0.5%	-5.6%	-3.4%	
Russia: MICEX	↑ 2,892.99	0.4%	-1.0%	2.0%	
India: SENSEX	↑ 39,802.57	2.1%	3.8%	9.1%	
China: Shanghai Comp	→ 3,218.05	-	-4.1%	-3.4%	
South Africa: JSE All Share	→ 54,524.05	-	1.2%	-0.6%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	42.65	3.3%	-26.9%	USDMUR	40.20	-0.12%	8.9%
Gold	↓	1,880.15	-1.7%	25.0%	EURMUR	47.25	-0.7%	16.6%
Platinum	↓	863.27	-3.8%	-1.9%	GBPMUR	51.89	-1.0%	14.0%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	205.00	205.64	6.19	0.1 m	4.7 m	-0.5%	-5.1%	-12.4%
IBLL	→	42.00	42.00	66.67	-	-	-	-2.3%	-15.2%
SBMH	→	3.25	3.25	560.34	-	-	-	-7.1%	-52.2%
TERRA	→	19.00	19.00	16.38	-	-	-	-3.6%	-3.8%
ENL	↑	13.50	13.50	4.77	0.001 m	-	3.8%	-10.3%	-23.1%
CIEL	→	3.10	3.10	-	-	-	-	-4.0%	-8.8%
ALTEO	→	14.45	14.45	-	-	-	-	-3.7%	-12.4%
PBL	→	580.00	580.00	15.08	-	-	-	-1.7%	-7.9%
ROGERS	↑	20.70	20.70	9.41	-	-	2.0%	-0.5%	-1.4%
VIVO	→	227.00	227.00	17.16	-	-	-	-	2.0%

DEM Most Active (3-month average)

EUDCOS	↓	9.90	10.02	11.49	-	-	-1.0%	-2.9%	-8.3%
SEMARIS	→	0.99	1.30	3.71	-	-	-	-1.0%	-23.3%
ABC Bank	→	17.00	44.20	8.02	-	-	-	-8.1%	-15.0%

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
1-Oct-20	CIM	The Board of Directors of CIM Financial Services Ltd ('CFSL') wishes to inform its shareholders and other stakeholders that further to the approval obtained from relevant authorities, the amalgamation of the following wholly owned subsidiaries of CFSL with and into CFSL has been completed and is effective from 01 October 2020: • Cim Finance Ltd • Mauritian Eagle Leasing Company Limited • Cim Agencies Ltd • Cim Management Services Ltd • Cim Shared Services Ltd
7-Oct-20	SEM	The Index Management Committee met on October 06, 2020 and selected the constituents of the SEM-10 Index and of the Reserve List for the fourth quarter starting October 07, 2020 as follows: MCB Group Limited, IBL Ltd, SBM Holdings Ltd, Phoenix Beverages Ltd, Vivo Energy Mauritius Ltd, ENL Limited, CIEL Limited, Rogers & Company Limited, Alteo Limited and Terra Mauricia Ltd

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