

### SEMDEX begins the week on cheerful note

Semdex	↑	1,621.88	Sem-10	↑	301.87	Demex	↓	228.70
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The **SEMDEX** flies high for the first trading day of the week as the market mood turns positive. Finance, leisure, hotel and sugar stocks push the index up by 8.5 points. **MCBG** is on mark with its eighth ascent finishing at Rs228 (+0.9%), yet on small volumes of 6.1k. **SBMH** also jumps by 2.6% to Rs3.59 on just 11k shares as **MUA** touches the Rs100 (+0.3%) mark. Hotel stocks regain strength with **NMH** upping to Rs4.30 (+2.4%) as **SUN** comes back to Rs13 (+2%). Leisure stocks **ASL** climbs to Rs96 as **LOTTO** makes an upturn to Rs8.20 (+1.2%). **OMNICANE** has been steadily climbing to Rs14.50 (+2.5%) after its dip to Rs12.15. On the DEM, notable movements were observed on **COVIFRA** inching up by 0.5% to Rs20 while **C-CARE** gives away 0.5% to Rs10.20.

**Foreign Investors (FI)** are seller with FIS of Rs0.3m.

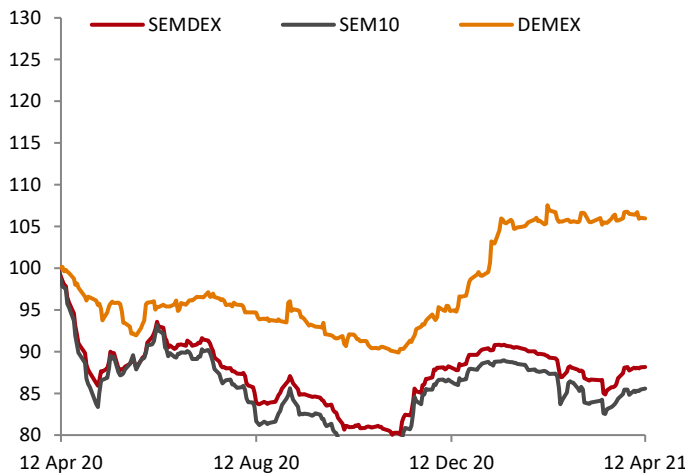
**Industry:** GAMMA rises to Rs34 (+0.7%) while MOROIL slips to Rs20.50 (-1.9%).

**Investments:** MDIT contracts to Rs2.18 (-0.5%) and MEDINE to Rs37.95 (-0.1%). FINCORP mounts to Rs18.45 (+0.3%) as ROGERS to Rs21.25 (+1.4%).

**International equity markets:** The S&P 500 index closed at record highs on Friday as investors remain cautiously optimistic about economic growth and progress against the pandemic

The **SEMDEX** rises to 1,621.88 (+0.5%), with market value traded (MVT) amounting to Rs8.9m for a total volume traded (TVT) of 0.4m.

### Market Indices: 1 year Trend (Rebased 100)



### Market Activity

Top gainers		Top losers	
ASL	3.2%	SBM BD B2	-2.8%
SBMH	2.6%	MOROIL	-1.9%
OMNICANE	2.5%	MDIT	-0.5%
NMH.O	2.4%	ADBF	-0.4%
SUN	2.0%	MEDINE	-0.1%
Most Active (Value)		Key Market Statistics	
SBM BD B2	3.2 m	Market Cap (Rs)	196.4 bn
BMH	2.0 m	Market Cap (USD)	4.9 bn
ADBF	1.7 m	Market Div Yield	1.9%
MCBG	1.4 m	Market P/E	11.7x
GAMMA	1.2 m	FI Participation	1.1%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↑	1,621.88	0.5%	2.7%	-2.0%	
SEM-ASI	↑	1,625.48	0.3%	1.99%	-1.2%	
SEM-VWAP	↑	1,626.77	0.3%	2.2%	-1.1%	
SEM10	↑	301.87	0.6%	2.7%	-2.7%	
DEMEX	↓	228.70	-0.1%	0.4%	0.0%	
<b>Global Indices</b>						
Japan: Nikkei 225	↑	29,768.06	0.2%	2.5%	5.8%	
US: S&P 500	↑	4,128.80	0.8%	6.5%	8.0%	
UK: FTSE 100	↓	6,915.80	-0.4%	2.8%	0.6%	
Europe: Euro Stoxx 50	↑	3,978.84	0.03%	5.1%	9.2%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↓	117,670.0	-0.5%	5.7%	-6.0%	
Russia: MICEX	↓	3,486.03	-0.3%	0.2%	0.9%	
India: SENSEX	↓	49,591.32	-0.3%	-2.8%	1.7%	
China: Shanghai Comp	↓	3,450.68	-0.9%	2.7%	-3.3%	
South Africa: JSE All Share	↑	67,191.25	0.2%	-2.3%	5.8%	

Commodities				Currencies			
	Closing	ID Δ	12M Δ		Closing	ID Δ	12M Δ
Oil (Brent)	↓ 62.95	-0.4%	118.5%	USDMUR	→ 40.80	-	2.6%
Gold	↓ 1,743.10	-0.7%	3.5%	EURMUR	↓ 48.64	-0.1%	11.7%
Platinum	↓ 1,198.50	-2.5%	59.9%	GBPMUR	↓ 55.98	-0.3%	12.8%

Selected stocks									
	Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ	
<b>SEM-10</b>									
MCBG	↑ 228.00	227.59	6.89	-	-	0.9%	1.3%	-4.0%	
IBLL	→ 45.90	45.90	-	-	-	-	4.7%	-3.3%	
SBMH	↑ 3.59	3.59	9.15	-	-	2.6%	7.2%	-47.2%	
MUA	↑ 100.00	100.00	13.81	-	-	0.3%	5.0%	9.0%	
ENL	→ 14.50	14.60	-	-	-	-	2.1%	-5.8%	
CIEL	→ 4.24	4.24	-	-	-	-	7.9%	10.1%	
ALTEO	→ 20.50	20.50	-	-	-	-	0.5%	-5.7%	
GRIT (USD)	→ 0.64	0.64	-	-	-	-	-7.2%	-13.5%	
ROGERS	↑ 21.25	21.25	-	-	-	1.4%	7.6%	-3.4%	
VIVO	→ 230.00	230.00	38.98	-	-	-	2.7%	3.1%	
<b>DEM Most Active (3-month average)</b>									
LFL.O	↓ 17.40	17.40	9.22	-	-	-1.1%	2.7%	-4.7%	
BEE	→ 25.00	25.00	-	-	-	-	-1.2%	5.0%	
PHIN	→ 399.00	399.00	16.75	-	-	-	-0.2%	-5.0%	

### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
26-Mar-21	LOTTO	Official	Dividend	Final	0.17	12-Apr-21	30-Jun-21
7-Apr-21	MISB	Official	Dividend	Final	USD 0.23	23-Apr-21	07-May-21
19-Mar-21	VIVO	Official	Dividend	Final	0.94	05-Apr-21	23-Apr-21
15-Feb-21	GRIT	Official	Dividend	Interim	USD 0.0150	03-Mar-21	09-Apr-21

### Latest Announcements

Date	Company	Details
5-Apr-21	GAMMA	The Board of Directors of Gamma has approved: (a) The implementation of a Multi-Currency Note Programme up to a maximum aggregate nominal amount of MUR 3,000,000,000; (b) The First Issue of the Notes shall be rated by CARE Ratings (Africa) Private Limited; (c) The said first issue of Notes, shall be by way of private placement, of up to MUR 1,000,000,000 and will not be listed on the SEM; and (d) The proceeds from the First Issue of the Notes shall be used to fund general working capital, future strategic initiatives and investments.
12-Apr-21	SUN	SUN's wholly owned subsidiary, SRL Kanuhura Limited, has entered into a binding sale and purchase agreement with Leisure Oceans Private Limited for the sale of its resort in the Maldives, Kanuhura Resort & Spa (the "Transaction"). The purchase consideration of USD 41.5m for the Transaction was determined based on the bids received as part of a competitive bidding process carried out by the lead transaction advisor.

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