

CIM: 12-month high

Semdex ↑ 1,624.36 Sem-10 ↑ 303.17 Demex ↑ 229.37

CIM carries on with its appreciation to its 12-month best at Rs6.96 (+0.3%) on 6.5k shares traded. **MCBG** also, pushes further with another 1.1% to Rs231.50 together with its **Preference** issue gaining 0.9% to Rs11.70. **IBL** dips for a second time to Rs45.50 on 189k shares exchanged after a good run to Rs45.90. Similarly, other large stocks contract with **CIEL** tumbling to Rs4.20 (-0.7%) and **ROGERS** down at Rs21.40 (-0.5%). After the previous day contraction, **MEDINE** recovers slightly by 0.9% to Rs35. **POLICY** wipes 0.3% to close at Rs3.66 as the investment company freshly publishes its NAV of Rs4.85 at 31 Mar 2021.

The **SEMDEX** rises to 1,624.36 (+0.2%), with market value traded (MVT) amounting to Rs25.7m for a total volume traded (TVT) of 0.5m.

Foreign Investors (FI) are **buyer** with FIP of Rs1.6m and FIS of Rs1.5m.

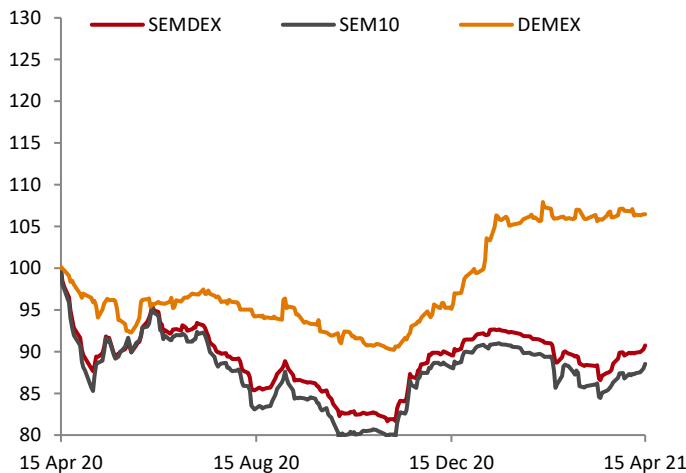
Industry: GAMMA drops to Rs33.75 (-0.7%).

Investments: CAUDAN inches up to Rs0.93 (+1.1%).

Leisure & Hotel: LOTTO falls to Rs8.02 (-2.2%). LUX ascends to Rs28.50 (+1.8%) while SUN dips to Rs12.90 (-0.8%).

International equity markets: The S&P 500 fell after hitting a record high for the fourth session as Wall Street banks kicked off earnings season with first-quarter numbers.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
LUX	1.8%	LOTTO	-2.2%
CAUDAN	1.1%	SUN	-0.8%
MCBG	1.1%	GAMMA	-0.7%
MCBGPREF	0.9%	CIEL	-0.7%
MEDINE	0.9%	ROGERS	-0.5%
Most Active (Value)		Key Market Statistics	
IBL	8.6 m	Market Cap (Rs)	196.7 bn
MCBG	6.1 m	Market Cap (USD)	4.9 bn
ALTEO	1.0 m	Market Div Yield	1.9%
TERRA	1.0 m	Market P/E	11.8x
MCBGPREF	0.5 m	FI Participation	6.1%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	1,624.36	0.2%	4.7%	-1.7%	
SEM-ASI	↑	1,627.01	0.2%	3.25%	-1.0%	
SEM-VWAP	↓	1,627.32	-0.02%	3.1%	-1.0%	
SEM10	↑	303.17	0.3%	5.2%	-2.1%	
DEMEX	↑	229.37	0.2%	0.3%	0.8%	
Global Indices						
Japan: Nikkei 225	↓	29,620.99	-0.4%	-0.3%	3.2%	
US: S&P 500	↓	4,124.66	-0.4%	4.6%	8.7%	
UK: FTSE 100	↑	6,939.60	0.7%	2.6%	2.0%	
Europe: Euro Stoxx 50	↑	3,976.28	0.2%	3.7%	9.2%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	120,295.0	0.8%	5.4%	-2.6%	
Russia: MICEX	↑	3,576.89	1.9%	2.1%	2.5%	
India: SENSEX	↓	38,116.29	-21.5%	-25.0%	-23.0%	
China: Shanghai Comp	↑	3,416.72	0.6%	-1.1%	-4.3%	
South Africa: JSE All Share	↑	67,812.13	1.1%	-0.6%	6.1%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	66.58	4.6%	124.9%	USDMUR	→	40.80	-	2.1%
Gold	↓	1,736.00	-0.4%	0.4%	EURMUR	↓	48.97	-1.9%	11.5%
Platinum	↑	1,170.50	1.1%	50.3%	GBPMUR	↑	56.32	0.0%	11.6%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	231.50	231.20	6.99	1.6 m	0.0 m	1.1%	7.2%	-2.7%
IBLL	↓	45.50	45.50	-	-	-	-0.5%	4.6%	-4.1%
SBMH	→	3.58	3.58	9.12	0.02 m	-	-	7.8%	-47.4%
MUA	→	102.25	100.99	14.12	-	-	-	7.3%	12.4%
ENL	→	14.50	14.60	-	-	-	-	4.3%	-4.3%
CIEL	↓	4.20	4.20	-	-	-	-0.7%	6.6%	9.1%
ALTEO	→	20.50	20.50	-	-	-	-	2.5%	-4.7%
GRIT (USD)	→	0.64	0.64	-	-	-	-	-7.2%	-11.1%
ROGERS	↓	21.40	21.38	-	-	-	-0.5%	11.2%	-3.8%
VIVO	→	230.00	230.00	38.98	0.001 m	-	-	2.7%	3.1%
DEM Most Active (3-month average)									
ATTITUDE	→	10.00	10.00	12.82	-	-	-	-6.1%	-11.9%
LFL.O	↑	18.40	18.09	9.75	-	-	4.5%	8.6%	-13.0%
EUDCOS	→	14.10	14.10	9.34	-	-	-	-6.0%	8.5%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
15-Apr-21	ADBF	Official	Dividend	Final	USD0.60	30-Apr-21	14-May-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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