

Construction stocks strengthen

Semdex 1,649.68 Sem-10 309.55 Demex 228.33

Construction stocks duo **GAMMA** and **UBP** solidifies their position with **GAMMA** rising to Rs32.15 (+0.2%) on 112k shares as **UBP** mounts to Rs125 on just 100 shares. Still on the winning side, **UTDL** appreciates to Rs55 (+3.8%), making it the best performer for the day, Finance stocks drag the market with **MCBG** dropping by 0.2% to Rs237.50, **MUA** by 2.2% to Rs90.75 and **SWANGEN** to Rs298 (-0.7%). Only **SBMH** finds its way up to Rs3.56 (+1.7%) but on very small volumes of 500 units exchanged. **MOROIL** continues to tilt down at Rs18.55 (-2.9%), currently at its fifth decline for the month of Jan 2020. On the DEM, **SEMARIS** makes its comeback with 4.2% gains to Rs1 while **ABC Banking** tumbles to Rs16.50 (-1.8%).

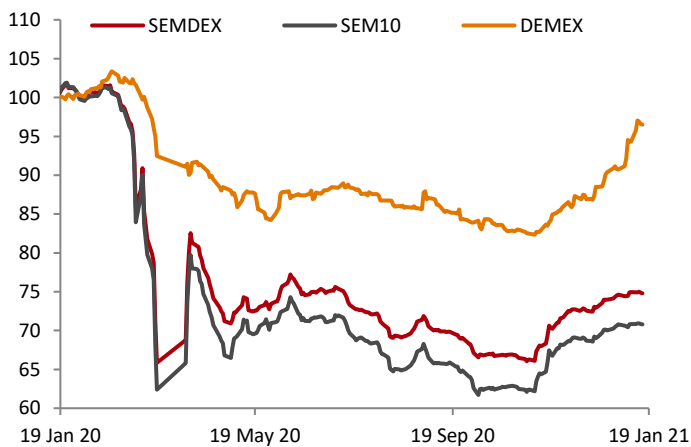
Investments: CAUDAN drops to Rs0.91 (-2.2%). FINCORP to Rs18 (-1.1%) and ALTEO to Rs21.15 (-0.5%). NIT climbs to Rs39.65 (+0.4%), **Leisure & Hotels:** LOTTO goes up to Rs8.52 (+0.2%) and NMH down to Rs5.24 (-3%). **PD:** BLUELIFE climbs to Rs1.10 (+1.9%).

International equity markets: The FTSE 100 slipped as a slide in crude oil prices weighed on energy stocks, while tighter restrictions on businesses raised concerns about the near-term economic impact.

The **SEMDEX** falls to 1,649.68 (-0.1%), with market value traded (MVT) amounting to Rs18.0m for a total volume traded (TVT) of 1.1m.

Foreign Investors (FI) are buyer with FIP of Rs2.8m and FIS of Rs2.6m.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
UTDL	3.8%	NMH	-3.0%
BLUELIFE	1.9%	MOROIL	-2.9%
SBMH	1.7%	MUA	-2.2%
UBP	1.4%	CAUDAN	-2.2%
NIT	0.4%	FINCORP	-1.1%
Most Active (Value)		Key Market Statistics	
MUA	5.0 m	Market Cap (Rs)	199.6 bn
GAMMA	3.6 m	Market Cap (USD)	5.1 bn
CIEL	2.4 m	Market Div Yield	2.3%
LUX	1.0 m	Market P/E	11.7x
MCBG	0.9 m	FI Participation	15.6%

Summary Market Data

	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	1,649.68	-0.1%	2.2%	11.7%	
SEM-ASI	1,642.24	0.03%	1.3%	7.6%	
SEM-VWAP	1,643.72	0.01%	1.3%	7.7%	
SEM10	309.55	0.05%	2.3%	12.9%	
DEMEX	228.33	0.2%	9.5%	15.90%	
Global Indices					
Japan: Nikkei 225	28,519.18	-	6.6%	21.8%	
US: S&P 500	3,768.25	-	1.6%	8.2%	
UK: FTSE 100	6,734.51	-0.02%	3.1%	13.8%	
Europe: Euro Stoxx 50	3,604.66	0.1%	1.7%	11.1%	
Emerging Market Indices					
Brazil: IBOVESPA	121,241.6	0.6%	3.0%	23.3%	
Russia: MICEX	3,472.74	0.6%	6.1%	24.0%	
India: SENSEX	49,392.71	0.7%	5.2%	23.5%	
China: Shanghai Comp	3,566.38	-	5.1%	6.9%	
South Africa: JSE All Share	63,713.87	0.3%	6.6%	15.7%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↓	54.75	-0.6%	-15.6%	USDMUR	↑	39.95	0.50%	8.3%
Gold	↑	1,836.89	0.6%	18.0%	EURMUR	↑	48.41	0.1%	17.8%
Platinum	↑	1,079.14	0.5%	5.5%	GBPMUR	↓	54.45	-0.0%	12.8%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	237.50	237.50	7.18	0.01 m	-	-0.2%	0.4%	14.7%
IBLL	→	47.45	47.45	-	-	-	-	3.2%	10.3%
SBMH	↑	3.56	3.56	613.8	-	-	1.7%	10.6%	-47.6%
MUA	↓	90.75	90.57	11.91	-	-	-2.2%	0.8%	8.0%
ENL	→	15.30	15.31	5.41	-	0.03 m	-	2.0%	17.2%
CIEL	→	3.85	3.85	-	2.4 m	2.3 m	-	6.9%	27.9%
ALTEO	↓	21.15	21.23	-	-	0.2 m	-0.5%	4.2%	42.4%
GRIT (USD)	→	0.72	0.72	-	-	-	-	-4.0%	12.5%
ROGERS	→	22.25	22.25	10.11	-	-	-	1.1%	12.7%
VIVO	→	223.00	223.00	16.86	-	-	-	2.8%	-0.9%

DEM Most Active (3-month average)

LAVASTONE	↑	1.45	1.45	-	-	0.02 m	3.1%	-9.1%	1.0%
EUDCOS	↑	14.00	13.88	9.27	-	-	3.6%	-9.4%	9.0%
SEMARIS	→	1.00	1.00	-	0.016 m	-	-	-9.1%	1.0%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
8-Dec-20	SWAN GEN	Official	Dividend	Final	14.40	23-Dec-20	15-Jan-21
10-Dec-20	ASCENCIA	DEM	Dividend	Interim	0.17	28-Dec-20	14-Jan-21
9-Dec-20	ALTEO	Official	Dividend	Interim	0.32	28-Dec-20	14-Jan-21
3-Dec-20	IBLL	Official	Dividend	Interim	0.11	18-Dec-20	30-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.
11-Jan-21	BLUELIFE	The Board of Directors ("The Board") of BlueLife Limited wishes to inform its shareholders and the public that it has appointed Mr. Jean-Claude Béga as Chairman of the Board in replacement of Mr. Sunil Banyamandhub who has expressed the wish to step down as Chairman whilst remaining a Board member as Non-Executive Director.

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