

### Friday flourish

Semdex ↑ 2,021.41      Sem-10 ↑ 370.83      Demex ↑ 285.95

The **SEMDEX** closes the week even further beyond the 2,000 mark crosses on Wednesday as the country embarks on its phase 2 of reopening of borders. Most sectors tilt up with finance, investments, hotels and property developments making the gainers list. **MCBG** fares better to Rs311.25 (+0.1%) as **CIM** advances to Rs9.26 (+0.4%). **SWANGEN** climbs to Rs372.50 (+0.5%). **IBL** touches Rs50 (+0.9%). Hotel trio close in the green with **LUX** the most to Rs8.96 (+3.5%), **SUN** to Rs16.50 (+2.5%) and **NMH** to Rs6.26 (+1%). **ASENCIA** makes another moves closer to Rs30 as it closes just a notch higher at Rs29.70 (+1.4%). **CIEL** moves up by 2.1% to Rs5.76. To recall **CIEL** recently published its FY21 results with Revenue totalling Rs17.9bn and PAT of Rs446m, marking an improvement on the loss after taxation of Rs2.2bn in 2020. Also, **CIEL** declared an interim dividend of MUR 0.05 (five cents) per ordinary share in respect of the financial year ending 30 June 2022. On the **DEM**, **APL** appreciates to Rs10.80 (+1.4%) as **SEMARIS** extends to Rs0.96 (+2.1%).

The **SEMDEX** rises to 2,021.41 (+0.5%), with market value traded (MVT) amounting to Rs24.8m for a total volume traded (TVT) of 0.5m.

**Foreign Investors (FI)** are **buyer** with FIP of Rs2.5m and FIS of Rs2.3m.

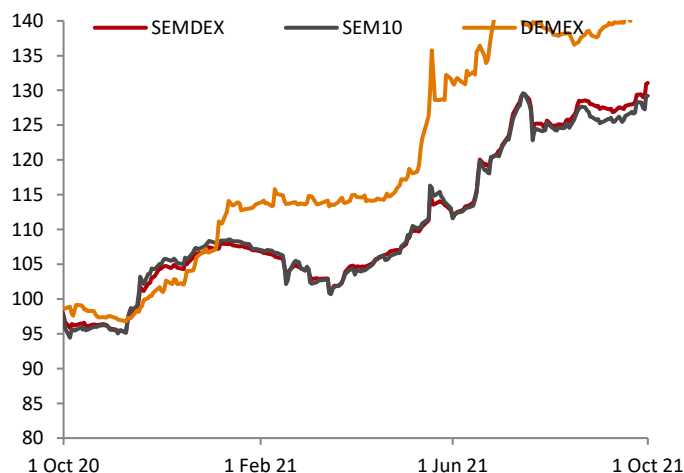
**Industry:** **GAMMA** rises to Rs42.70 (+0.5%). **MOROIL** falls to Rs20.20 (-1.5%).

**Investments:** **ALTEO** slips to Rs29.95 (-0.2%). **POLICY** climbs to Rs5.56 (+10.4%)., **NIT** to Rs38 (+1.1%), **ROGERS** to Rs23.90 (+1.7%) and **MEDINE** to Rs50 (+3.1%).

**Sugar:** **OMNICANE** contracts to Rs17.80 (-6%)

**International equity markets:** The S&P 500 dropped on Thursday after concerns over inflation.

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



### Market Activity

Top gainers		Top losers	
NMH PREF	3.5%	AFREXIM DR (USD)	-10.0%
MEDINE	3.1%	MOROIL	-1.5%
TERRA	2.5%	MCBG PREF	-0.5%
SUN	2.5%	LOTTO	-0.2%
CAUDAN	2.2%	ALTEO	-0.2%

Most Active (Value)		Key Market Statistics	
MCBG	11.1 m	Market Cap (Rs)	258.7 bn
AFREXIM DR	2.3 m	Market Cap (USD)	6.1 bn
MUA	1.1 m	Market Div Yield	2.9%
SBMH	0.6 m	Market P/E	14.9x
POLICY	0.5 m	FI Participation	9.6%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↑	2,021.41	0.5%	3.4%	7.9%	
SEM-ASI	↑	1,876.47	0.1%	1.9%	3.7%	
SEM-VWAP	↑	1,877.06	0.1%	1.8%	3.8%	
SEM10	↑	370.83	0.38%	3.5%	6.4%	
DEMEX	↑	285.95	0.0%	3.0%	0.4%	
<b>Global Indices</b>						
Japan: Nikkei 225	↓	29,452.66	-0.3%	6.0%	2.3%	
US: S&P 500	↓	4,307.54	-1.2%	-4.9%	0.2%	
UK: FTSE 100	↓	7,086.42	-0.3%	-0.9%	0.7%	
Europe: Euro Stoxx 50	↓	4,048.08	-0.8%	-3.6%	-0.4%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↑	111,117.0	0.0%	-7.2%	-12.4%	
Russia: MICEX	↑	4,103.52	1.1%	4.5%	6.8%	
India: SENSEX	↓	59,126.36	-0.5%	3.9%	12.7%	
China: Shanghai Comp	↑	3,568.17	0.9%	1.1%	-0.6%	
South Africa: JSE All Share	→	64,363.66	-	-4.0%	-2.8%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	78.35	-0.4%	91.3%	USDMUR	→	42.90	-	6.5%
Gold	↑	1,756.66	1.7%	-6.8%	EURMUR	↓	49.83	-0.3%	5.1%
Platinum	↑	963.40	1.4%	8.5%	GBPMUR	↓	57.92	-0.0%	10.9%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	311.25	311.17	9.29	1.00 m	-	0.1%	7.1%	11.2%
IBLL	↑	50.00	49.91	200.00	-	-	0.9%	2.0%	7.5%
SBMH	→	4.15	4.15	10.58	-	-	-	-5.0%	-39.0%
MUA	→	121.00	121.00	16.71	-	-	-	3.4%	6.1%
ENL	→	19.00	19.00	-	-	-	-	-8.2%	-10.4%
CIEL	↑	5.76	5.71	15.57	0.003 m	-	2.1%	6.7%	10.8%
ALTEO	↓	29.95	29.68	8.23	-	-	-0.2%	7.9%	10.9%
GRIT (USD)	→	0.51	0.51	-	-	-	-	-3.8%	-13.6%
ROGERS	↑	23.90	23.86	-	-	-	1.7%	3.9%	-4.4%
VIVO	→	240.25	240.25	40.72	-	-	-	-0.2%	0.1%
<b>DEM Most Active (3-month average)</b>									
LFL.O	→	20.25	20.25	10.73	-	-	-	14.1%	15.1%
ABC Bank	→	19.30	19.27	12.22	-	-	-	9.3%	20.6%
EUDCOS	→	15.75	15.78	13.24	-	-	-	8.6%	7.9%

### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
17-Jun-21	HWP	DEM	Dividend	Final	0.45	02-Jul-21	29-Oct-21
6-Aug-21	KOLOS	DEM	Dividend	Interim	3.30	23-Aug-21	30-Sep-21
11-Aug-21	GAMMA	Official	Dividend	Interim	0.50	27-Aug-21	30-Sep-21
24-Jun-21	MDIT	Official	Dividend	Final	0.07	16-Sep-21	30-Sep-21

### Latest Announcements

Date	Company	Details
18-Aug-21	NMH	NMH has obtained the approval of the required majority of its noteholders for waiving the Gearing Covenant (being the gearing covenant stipulated under the applicable pricing supplement dated 30 October 2017 issued pursuant to the Programme for the financial years ended on (the "Waiver"): a) 30 June 2020; b) 30 June 2021; and c) 30 June 2022, with respect to all tranches of notes (the "Notes") issued by NMH pursuant to a MUR 6bn multi-currency note programme dated 9 October 2017.
28-Sep-21	MCBG	The Board of Directors of MCBG has approved, subject to regulatory approval being obtained, a Scrip Dividend Scheme whereby Ordinary shareholders will have the option of receiving their future dividends, or part of thereof, by way of Ordinary shares of the company. The terms of the Scrip Dividend shall be communicated once requisite regulatory approval has been obtained.

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