

Hotel stocks rally

Semdex 2,029.32 Sem-10 371.80 Demex 287.60

Hotel stocks rally with **NMH** being the top gainer with 8.6% gain to Rs6.80 on 72k shares exchanged. **LUX** touches Rs45.75 (+1.7%) on 39k shares as **SUN** ascends to Rs17 (+3%) on 51k shares. On the finance side, **SBMH** declines further to Rs4.13 (-0.5%) as **MCBG** shifts up to Rs312.50 (+0.4%). **CIM** curbs down its rise and drops to Rs9.22 (-0.4%). **GAMMA** extends to Rs42.90 (+0.5%) as **MOROIL** climbs to Rs20.30. **PBL** descends to Rs600 (-1%). Among investment stocks, **CAUDAN** drops to Rs0.93 (-2.1%) and **ALTEO** to Rs29.90 (-0.2%). On the DEM, **C-CARE** advances to Rs21.50 (+2.4%) while **SEMARIS** picks a U-turn to Rs0.92 (-4.2%).

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

Investments: TERRA climbs to Rs27 (+0.9%). CIEL to Rs5.82 (+1%), PAD to Rs93.50 (+1.7%), ROGERS to Rs24.50 (+2.5%) and POLICY to Rs5.80 (+4.3%).

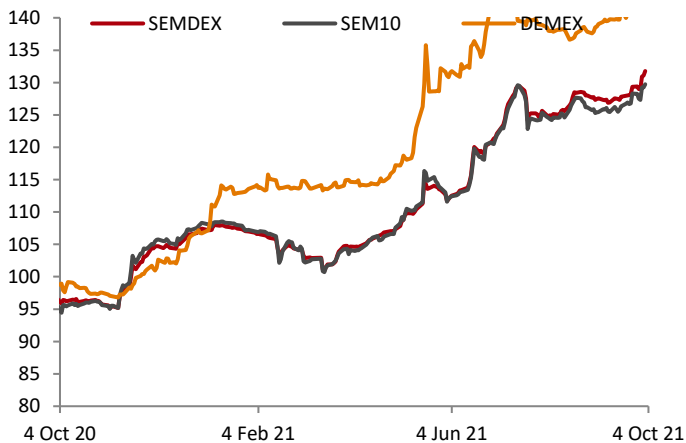
Sugar: OMNICANE rises to Rs17.90 (+0.6%)

International equity markets: U.S. stocks pushed higher on Friday as investors shook off a rough September and news of a new oral treatment for Covid-19 boosted shares of companies tied to the economic recovery.

The **SEMDEX** rises to 2,029.32 (+0.4%), with market value traded (MVT) amounting to Rs38.1m for a total volume traded (TVT) of 0.7m.

Foreign Investors (FI) are **Seller** with FIS of Rs13.2m and FIS of Rs0.02m.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
NMH	8.6%	CAUDAN	-2.1%
POLICY	4.3%	PBL	-1.0%
SUN	3.0%	SBMH	-0.5%
ROGERS	2.5%	CIM	-0.4%
LUX	1.7%	ALTEO	-0.2%
Most Active (Value)		Key Market Statistics	
MCBG	25.9 m	Market Cap (Rs)	259.8 bn
LUX	1.8 m	Market Cap (USD)	6.1 bn
ROGERS	0.9 m	Market Div Yield	2.9%
SUN	0.9 m	Market P/E	14.9x
AFREXIM DR I	0.9 m	FI Participation	17.7%

Summary Market Data	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	2,029.32	0.4%	3.7%	7.5%	
SEM-ASI	1,880.42	0.2%	2.1%	3.5%	
SEM-VWAP	1,880.94	0.2%	2.0%	3.5%	
SEM10	371.80	0.3%	3.7%	5.8%	
DEMEX	287.60	0.6%	3.5%	1.0%	
Global Indices					
Japan: Nikkei 225	28,464.23	-3.4%	0.0%	-0.8%	
US: S&P 500	4,357.04	1.1%	-3.7%	0.9%	
UK: FTSE 100	7,027.07	-0.8%	-1.7%	-1.4%	
Europe: Euro Stoxx 50	4,035.30	-0.3%	-4.5%	-1.1%	
Emerging Market Indices					
Brazil: IBOVESPA	112,899.6	1.6%	-5.4%	-10.2%	
Russia: MICEX	4,086.99	-0.4%	2.9%	5.9%	
India: SENSEX	58,765.58	-0.6%	2.5%	12.3%	
China: Shanghai Comp	3,568.17	-	0.0%	-0.6%	
South Africa: JSE All Share	63,661.00	-1.1%	-4.9%	-4.3%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	79.28	1.2%	93.7%	USDMUR	⇒	42.90	-	6.5%
Gold	↑	1,760.36	0.2%	-7.6%	EURMUR	↑	49.89	0.1%	5.5%
Platinum	↑	972.00	0.9%	8.5%	GBPMUR	↑	58.26	0.6%	12.2%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	312.50	312.31	9.33	0.004 m	12.6 m	0.4%	7.4%	11.4%
IBLL	⇒	50.00	50.00	200.00	-	-	-	2.0%	5.3%
SBMH	↓	4.13	4.13	10.52	-	-	-0.5%	-4.0%	-39.3%
MUA	⇒	121.00	121.00	16.71	-	-	-	2.5%	6.1%
ENL	⇒	19.00	19.00	-	-	-	-	-9.3%	-19.0%
CIEL	↑	5.82	5.78	15.73	-	-	1.0%	7.8%	9.4%
ALTEO	↓	29.90	29.95	8.21	-	-	-0.2%	8.9%	13.9%
GRIT (USD)	⇒	0.51	0.51	-	0.002 m	-	-	-12.1%	-13.6%
ROGERS	↑	24.50	24.02	-	-	-	2.5%	6.5%	-2.0%
VIVO	⇒	240.25	240.25	40.72	-	-	-	-0.2%	0.1%
DEM Most Active (3-month average)									
LFLO	↑	20.50	20.50	10.87	-	-	1.2%	15.5%	16.5%
ABC Bank	↓	19.20	19.20	12.15	-	-	-0.5%	8.8%	20.0%
EUDCOS	⇒	15.75	15.75	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	2-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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