

### Active session led by foreign participants

Semdex	↑	1,963.39	Sem-I0	↑	357.30	Demex	↓	255.62
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Domestic markets start the week in the green territory with the **SEMDEX** moving slightly higher to 1,963.39 (+0.2%). Finance stock **MCBG** moves up to Rs311.00 (+0.2%) on 240.9k units. **OMNICANE** falls to Rs20.80 (-0.5%). Leisure & Hotels stock **NMH** finishes lower to Rs8.02 (-2.0%). On the DEM, **LAVA** advances to Rs2.10 (+1.5%), **HTSL** rises to Rs19.55 (+0.3%) and **TROPICAL PAR (O)** inches up to Rs3.22 (+0.6%), while **RHT** falls to Rs17.50 (-7.4%).

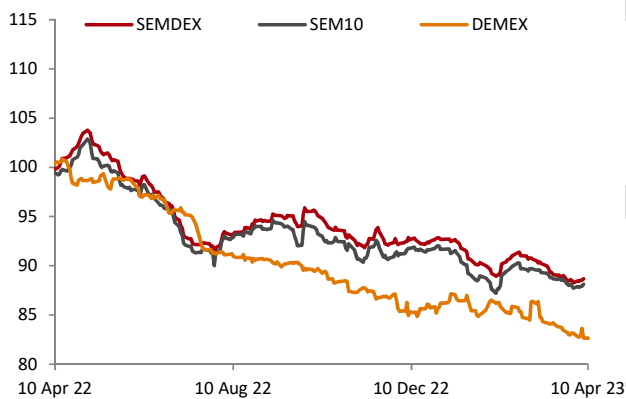
The SEMDEX rises to 1,963.39 (+0.2%), with market value traded (MVT) amounting to Rs98.3m for a total volume traded (TVT) of 0.5m.

**Foreign Investors (FI)** are seller with FIS Rs71.1m and FIP Rs61.0m.

**Investments:** **CAUDAN** inches down to Rs0.59 (-1.7%), **CIEL** moves lower to Rs6.16 (-0.3%), **ENL** rises to Rs20.95 (+4.8%), **FINCORP** falls to Rs16.00 (-0.3%), **NIT** falls to Rs22.70 (-24.3%) and **MDIT** recovers to Rs2.10 (+4.0%).

**International equity markets:** US markets were closed on Friday because of Good Friday. The unemployment rate data was released, which came at 3.5%, below expectations of 3.6%. The Tourism & Hotel sector added the highest number of jobs (72k) for the month of March, followed by Healthcare and the Government sector. Markets are now expecting the Fed to hike interest rate by a quarter percentage point in its next meeting.

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



### Market Activity

Top gainers		Top losers	
ENL	4.7%	NIT	-24.3%
MDIT	4.0%	NMH.O	-2.0%
MCBG	0.2%	CAUDAN	-1.7%
IOST.D1110	0.1%	OMNICANE	-0.5%
		ADBF	-0.4%
Most Active (Value)		Key Market Statistics	
MCBG	74.9 m	Market Cap (Rs)	246.7 bn
CMSP2	15.3 m	Market Cap (USD)	5.5 bn
SUN FRN7Y	3.5 m	Market Div Yield	3.8%
IBLL	1.1 m	Market P/E	8.9x
IOST.D1110	1.0 m	FI Participation	67.2%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↑	1,963.39	0.15%	-1.7%	-4.3%	
SEM-ASI	↑	1,822.90	0.0%	-2.3%	-3.5%	
SEM-VWAP	↑	1,825.52	0.08%	-2.5%	-3.3%	
SEM10	↑	357.30	0.22%	-1.3%	-3.7%	
DEMEX	↓	255.62	-0.0%	-2.0%	-4.6%	
<b>Global Indices</b>						
Japan: Nikkei 225	↑	27,518.31	0.2%	-2.8%	5.9%	
US: S&P 500	↑	4,105.02	0.4%	1.4%	5.4%	
UK: FTSE 100	↑	7,741.56	1.0%	-2.37%	0.5%	
Europe: Euro Stoxx 50	↑	4,309.45	0.3%	-0.1%	7.3%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↓	100,822.0	-0.2%	-3.7%	-7.4%	
Russia: MICEX	↑	2,508.39	0.2%	9.3%	16.3%	
India: SENSEX	↑	59,832.97	0.2%	-0.7%	-0.1%	
China: Shanghai Comp	↑	3,327.65	0.5%	1.3%	5.4%	
South Africa: JSE All Share	→	77,113.70	-	-1.8%	0.3%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	⇒	84.67	-	-15.8%	USDMUR	⇒	45.70	-	4.8%
Gold	⇒	2,007.67	-	3.9%	EURMUR	↓	49.99	-0.2%	4.6%
Platinum	⇒	1,007.00	-	4.8%	GBPMUR	↓	56.94	-0.3%	-0.3%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	311.00	310.16	7.74	61.0 m	70.0 m	0.2%	-1.3%	2.0%
IBLL	⇒	44.00	44.00	25.58	-	-	-	-	-15.0%
SBMH	⇒	4.50	4.50	3.20	-	-	-	-	-33.8%
AFREXIM	⇒	2.59	2.59	4.07	-	-	-	-0.8%	-4.1%
ENL	↑	20.95	20.29	9.05	-	-	4.7%	-0.2%	-12.7%
CIEL	↓	6.16	6.18	8.03	-	-	-0.3%	0.3%	0.3%
VIVO	⇒	284.00	284.00	15.85	-	0.1 m	-	0.7%	7.2%
GRIT (USD)	⇒	0.30	0.30	11.45	-	-	-	-9.1%	-16.7%
ASCENCIA	⇒	21.40	21.40	10.39	-	-	-	-3.6%	-12.5%
PBL	⇒	530.00	530.00	20.89	-	-	-	2.3%	0.4%
<b>DEM Most Active (3-month average)</b>									
EUDCOS	⇒	14.00	11.00	11.1	-	-	-	3.7%	-
CHSL	⇒	20.00	14.00	5.76	-	-	-	-2.2%	-1.5%
HOTELEST	↑	19.55	19.50	9.75	-	-	0.3%	-3.7%	-4.6%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
3-Apr-23	ADBF	Official	Dividend	Final	USD 0.30	19-Apr-23	8-May-23
31-Mar-23	GAMMA	Official	Dividend	Final	1.75	18-Apr-23	10-May-23
31-Mar-23	KOLOS	DEM	Dividend	Final	1.77	18-Apr-23	5-May-23
29-Mar-23	SBMH	Official	Dividend	Interim	0.20	12-May-23	15-Jun-23

#### Latest Announcements

Date	Company	Details
31-Mar-23	HAREL	The Board of Directors of Harel Mallac approved a value of Rs36.00 for each ordinary share of Cavell Touristic Investments Ltd (CTIL) which will be distributed to the shareholders of Harel Mallac in the ratio 1:1, subject to the necessary approvals of shareholders and regulators.
10-Mar-23	CIM	Cim intends to acquire a controlling stake in SME-focused lender, Loinette Capital Limited.

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