

### MDIT features as most active in terms of volume traded

Semdex	↓	2,027.62	Sem-10	↓	371.09	Demex	↓	254.68
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Domestic markets start the week in the red territory. The **SEMDEX** slips by 0.5 points to finish at 2,027.62 (-0.02%). Commerce stock **VIVO** marks new 52-week high of Rs310.75 (+0.2%) on 2.4k units. Industry stock **PBL** reverses previous gains and falls to Rs535.00 (-0.9%) on only 100 units. Leisure stock **ASL** inches up to Rs70.25 (+0.4%) on 2.9k units. Property stock **ASCENCIA** moves up to one-month high of Rs20.20 (+1.0%). **AFREXIM** slips to USD2.90 (-1.7%) on 73.4k units and captures majority of foreign purchases and sales. On the DEM, **ABC** falls to Rs112.00 (-2.6%) on 33k units and **VELOGIC** moves lower to Rs24.15 (-0.2%).

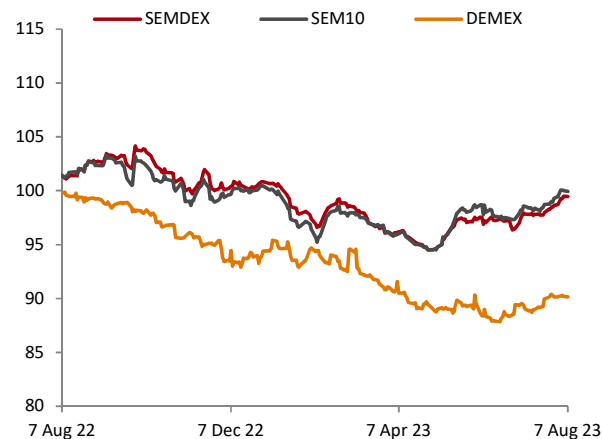
The SEMDEX slips to 2,027.62 (-0.02%) with market value traded (MVT) amounting to Rs23.5m for a total volume traded (TVT) of 1.2m.

Foreign Investors (FI) are net sellers with FIS Rs5.3m and FIP Rs2.4m.

**International equity markets:** US stocks ended the week in the red territory following the release of the July jobs report. The non-farm payroll published by the Bureau of Labour Statistics showed that the US economy added +187k jobs, and the unemployment rate ticked slightly lower to 3.5%. The S&P 500 fell by -0.5%, the Dow Jones Industrial Average (^DJI) down by -0.4% and Nasdaq inched moved lower by -0.4%.

**Investments:** **ALTEO** hits one-month high of Rs8.60 (+0.7%) on 54.6k units, **MDIT** slips to Rs2.02 (-1.5%) on 588k units and features as most active in terms of volume traded and **POLICY** plummets to Rs3.00 (-9.1%) on 73.9k units.

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



### Market Activity

Top gainers		Top losers	
ASCENCIA	1.0%	POLICY	-9.1%
ALTEO	0.7%	CAUDAN	-3.6%
ASL	0.4%	AFREXIM	-1.7%
VIVO	0.2%	MDIT	-1.5%
SBM BD B2	0.1%	PBL	-0.9%

Most Active (Value)		Key Market Statistics	
AFREXIM	9.7 m	Market Cap (Rs)	255.4 bn
MCBG	4.3 m	Market Cap (USD)	5.7 bn
TERRA	1.8 m	Market Div Yield	3.8%
MDIT	1.2 m	Market P/E	9.1x
IBLL.D0145	0.9 m	FI Participation	0.2x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↓	2,027.62	-0.02%	1.7%	4.9%	
SEM-ASI	↓	1,881.71	-0.1%	1.4%	4.8%	
SEM-VWAP	↓	1,883.77	-0.06%	1.2%	4.9%	
SEM10	↓	371.09	-0.07%	1.4%	5.4%	
DEMEX	↓	254.68	-0.1%	1.2%	1.3%	
<b>Global Indices</b>						
Japan: Nikkei 225	↑	32,192.75	0.1%	-3.7%	10.4%	
US: S&P 500	↓	4,478.03	-0.5%	0.5%	10.3%	
UK: FTSE 100	↑	7,564.37	0.5%	0.59%	-1.8%	
Europe: Euro Stoxx 50	↑	4,332.91	0.7%	-1.3%	1.1%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↓	119,507.7	-0.9%	0.4%	17.0%	
Russia: MICEX	↓	3,092.44	-1.8%	10.1%	22.5%	
India: SENSEX	↑	65,721.25	0.7%	0.4%	6.4%	
China: Shanghai Comp	↑	3,288.08	0.2%	1.3%	-1.9%	
South Africa: JSE All Share	↑	76,960.61	0.3%	1.0%	-0.4%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	86.24	1.3%	-9.1%	USDMUR	45.60	-0.2%	1.1%
Gold	↑	1,942.91	0.5%	9.5%	EURMUR	50.61	0.2%	8.9%
Platinum	↑	925.95	0.9%	-0.6%	GBPMUR	58.64	-0.1%	6.6%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	⇒	320.00	320.00	7.97	-	0.7 m	-	1.3%	2.6%
IBLL	⇒	45.50	45.50	26.45	-	-	-	1.3%	4.6%
SBMH	⇒	4.45	4.45	3.16	-	0.14 m	-	-1.1%	-3.1%
AFREXIM	↓	2.90	2.93	4.80	2.4 m	3.27 m	-1.7%	9.4%	12.0%
ENL	⇒	20.00	20.00	9.05	-	0.13 m	-	1.3%	1.0%
CIEL	⇒	6.78	6.78	8.81	-	-	-	-1.7%	10.4%
VIVO	↑	310.75	310.75	17.34	-	-	0.2%	5.5%	8.6%
ROGERS	↑	30.16	30.15	7.87	-	-	0.5%	1.5%	10.5%
ASCENCIA	↑	20.20	20.00	9.81	-	0.206 m	1.0%	1.5%	-3.3%
PBL	↓	535.00	535.00	21.09	-	-	-0.9%	0.9%	1.7%
<b>DEM Most Active (3-month average)</b>									
ABC	↓	112.00	112.00	13.0	-	-	-2.6%	-3.4%	-
BEE	⇒	13.45	13.45	1.81	-	-	-	5.9%	-77.2%
LFL.O	⇒	20.20	112.00	9.27	-	-	-	-2.2%	-4.3%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
31-Jul-23	GAMMA	Official	Dividend	Interim	0.50	15-Aug-23	1-Sep-23
26-Jul-23	LOTTO	Official	Dividend	Interim	0.20	10-Aug-23	1-Sep-23
6-Jul-23	NMH PREF	Official	Dividend	Final	1.65	21-Jul-23	24-Aug-23
4-Jul-23	MDIT	Official	Dividend	Final	0.07	21-Sep-23	29-Sep-23

#### Latest Announcements

Date	Company	Details
4-Aug-23	OMNICANE	Omnicanne has received the approval of shareholders regarding the acquisition of Omnicane Management & Consultancy Limited and its subsidiaries, namely, Omnicane Treasury Management Ltd and Morningside Hospitality Management Ltd from Omnicane Holdings Limited. Furthermore, the shareholders have also approved, vide special resolutions, the following: 1) The conversion of the par value shares of the Company of MUR 7.50, each, to no par value; 2) The adoption of a new constitution for Omnicane.
21-Jul-23	S&P Global Ratings	S&P Global Ratings assigned its 'BBB-/A-3' long-and short-term foreign and local currency sovereign credit ratings to Mauritius. The outlook on the long-term sovereign credit rating is stable, in line with their expectation that budgetary and external pressures will ease thanks to strong economic growth.

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