

### The SEMDEX snaps winning streak

Semdex	↓	2,037.15	Sem-10	↓	371.54	Demex	↓	253.87
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The **SEMDEX** slips by 3.7 points to finish at 2,037.15 (-0.2%) with market value traded (MVT) amounting to Rs50.7m for a total volume traded (TVT) of 3.3m. The index has been on a winning streak over the past six sessions. It hit the 2,000 points benchmark on the 24<sup>th</sup> of July and is down by -0.7% year-to-date.

Finance: **MCBG** stays flat at Rs322.50, with majority of market value traded (76.1%), equivalent to Rs38.6m. **SBMH** reverses gains and inches down to Rs4.51 (-0.2%).

Leisure & Hotels: **NMH** is the only gainer in today's session, moving up to Rs9.60 (+3.2%) on 207.1k units. **LUX** declines to Rs55.00 (-1.8%).

Commerce: **IBL** slips further to Rs45.00 (-0.9%).

Industry: **GAMMA** falls from its one-month high and trades cum-dividend at Rs36.25 (-1.0%).

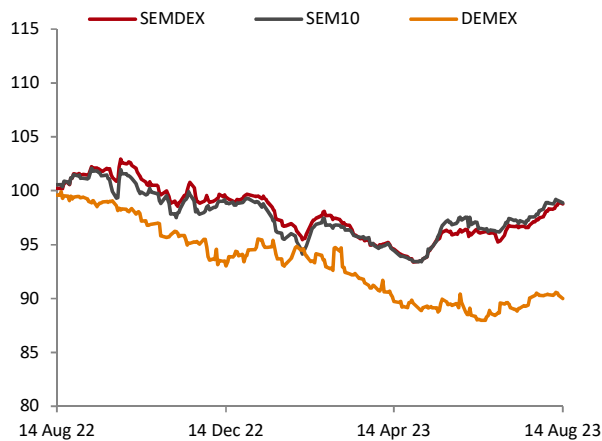
Investments: **CAUDAN** (-5.5%), **CIEL** (-0.3%), **MSE** (-0.5%), **UTDL** (-1.3%).

On the DEM, **ABCB** rises to Rs21.55 (+0.2%) and **SCT** gains +0.6% to finish at Rs1.81. On the losing side, **MIWA** falls to USD0.28 (-3.5%), **LFL (Ord)** down to Rs20.00 (-1.0%) and **MCOS** inches down to Rs20.75 (-0.7%).

**Foreign Investors** (FI) are net sellers with FIP Rs5.6m and FIS Rs38.1m.

**International equity markets:** US stocks finished mixed in Friday's session with investors continuing to digest the July Consumer Price Index (CPI) print. While inflation is gradually easing, it still remains above the Fed's target of 2%. The S&P 500 fell by -0.1%, the Dow Jones Industrial Average (^DJI) rose slightly by +0.3% and Nasdaq lost -0.7%.

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



### Market Activity

Top gainers		Top losers	
NMH.O	3.2%	CAUDAN	-5.5%
		LUX	-1.8%
		NEWGOLD	-1.5%
		UTDL	-1.3%
		GAMMA	-1.0%
Most Active (Value)		Key Market Statistics	
MCBG	38.6 m	Market Cap (Rs)	256.6 bn
CIEL	3.1 m	Market Cap (USD)	5.7 bn
SBMH	2.6 m	Market Div Yield	3.8%
NMH.O	1.9 m	Market P/E	9.1x
ENL	1.4 m	FI Participation	0.4x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↓	2,037.15	-0.18%	2.2%	4.2%	
SEM-ASI	↓	1,886.95	-0.1%	1.9%	4.0%	
SEM-VWAP	↓	1,889.47	-0.05%	1.9%	4.1%	
SEM10	↓	371.54	-0.17%	1.7%	4.3%	
DEMEX	↓	253.87	-0.3%	1.0%	1.0%	
<b>Global Indices</b>						
Japan: Nikkei 225	↑	32,473.65	0.8%	0.9%	11.5%	
US: S&P 500	↓	4,464.05	-0.1%	0.6%	8.1%	
UK: FTSE 100	↓	7,524.16	-1.2%	3.32%	-2.7%	
Europe: Euro Stoxx 50	↓	4,321.33	-1.4%	0.8%	0.3%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↓	118,065.1	-0.2%	0.7%	9.1%	
Russia: MICEX	↑	3,155.51	0.2%	10.3%	21.6%	
India: SENSEX	↓	65,322.65	-0.6%	-0.4%	5.5%	
China: Shanghai Comp	↓	3,189.25	-2.0%	-1.0%	-3.6%	
South Africa: JSE All Share	↓	76,974.26	-1.0%	2.8%	-0.0%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	86.40	-1.3%	-10.5%	USDMUR	45.67	0.1%	-0.3%
Gold	↓	1,912.48	-0.1%	6.6%	EURMUR	50.42	-0.4%	5.9%
Platinum	↑	910.57	2.0%	-2.9%	GBPMUR	58.42	-	4.1%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	⇒	322.50	322.54	8.03	4.8 m	34.2 m	-	2.4%	0.7%
IBLL	↓	45.00	45.09	26.16	0.05 m	-	-0.9%	-	3.4%
SBMH	↓	4.51	4.52	3.20	0.13 m	0.52 m	-0.2%	1.1%	-0.9%
AFREXIM	⇒	2.75	2.75	4.55	-	-	-	3.8%	5.8%
ENL	⇒	20.25	20.25	9.16	-	1.36 m	-	1.3%	1.0%
CIEL	↓	6.76	6.78	8.78	-	-	-0.3%	-0.3%	8.3%
VIVO	⇒	310.75	311.25	17.34	-	-	-	5.5%	8.6%
ROGERS	⇒	30.15	30.15	7.87	-	-	-	0.5%	10.4%
ASCENCIA	⇒	20.50	20.50	9.95	-	-	-	3.0%	-1.9%
PBL	⇒	535.00	535.00	21.09	0.5 m	-	-	0.4%	1.7%
<b>DEM Most Active (3-month average)</b>									
MIWA	↓	0.28	0.28	0.0	-	-	-3.4%	-	-
ABC Bank	↑	21.55	21.55	8.16	0.093 m	-	0.2%	7.8%	14.9%
LFL.O	↓	20.00	0.28	9.17	-	-	-1.0%	-3.1%	-5.2%

### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
11-Aug-23	VIVO	Official	Dividend	Interim	1.58	28-Aug-23	15-Sep-23
8-Aug-23	CIMO	DEM	Dividend	Interim	0.35	23-Aug-23	5-Sep-23
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

### Latest Announcements

Date	Company	Details
11-Aug-23	IBL	IBL wishes to inform its shareholders and the public in general that, post the satisfactory completion of precedent conditions, IBL has proceeded with a 51% indirect subscription of the share capital of Make Distribution, the retail operator of 4 hypermarkets trading under the brand name of "Run Market" in Reunion Island.
4-Aug-23	OMNICANE	Omnicanne has received the approval of shareholders regarding the acquisition of Omnicanne Management & Consultancy Limited and its subsidiaries, namely, Omnicanne Treasury Management Ltd and Morningside Hospitality Management Ltd from Omnicanne 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 Omnicanne.

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