

NMH extends winning streak for fourth session

Semdex	↑	2,039.23	Sem-10	↓	370.37	Demex	↑	254.58
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The **SEMDEX** rises timidly by 1.3 points to finish at 2,039.23 (+0.06%) with market value traded (MVT) amounting to Rs81.6m for a total volume traded (TVT) of 5.3m.

Investments: **ALTEO** declines to Rs8.60 (-4.0%) on 10.6k units. **CIEL** slips further to Rs6.50 (-2.1%), with total value traded amounting to Rs26.7m.

NMH rises to new 8-month high of Rs9.86 (+0.6%), with value traded for the day amounting to Rs0.5m. The stock extends its winning streak to four straight sessions and is currently up by +8.4% year-to-date. Total value recorded for the week so far amounts to Rs2.9m.

AFREXIM tumbles to USD2.65 (-3.6%) on 2.7k units.

Foreign Investors (FI) are net sellers with FIP Rs36.0m and FIS Rs54.5m.

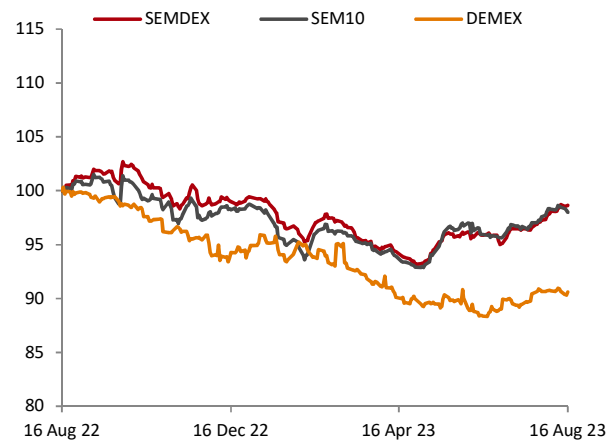
Finance: **MCBG** rises to fresh one-month high of Rs323.00 (+0.2%) on 128.1k units.

International equity markets: US stocks reversed earlier gains and fell in the red territory. The S&P 500 fell by -1.2%, the Dow Jones Industrial Average (^DJI) down by -1.0% and Nasdaq declined by -1.1%. The People Bank of China (PBOC) cut rate by 15 bps on their one-year medium-term lending facility loans to 2.50%. The Chinese economy is showing signs of weaknesses with slow consumer spending and rising level of unemployment.

Leisure & Hotel: **LUX** jumps by +3.6% to close at Rs57.00 and **SUN** inches up to Rs33.20 (+0.6%) on only 0.7k units.

Commerce: **IBL** recovers to Rs44.90 (+0.2%) on 52k units.

Property: **BLL** slips to Rs0.55 (-3.5%).

Market Indices: 1 year Trend (Rebased 100)

Market Activity

Top gainers		Top losers	
LUX	3.6%	ALTEO	-4.0%
NMH.O	0.6%	AFREXIM	-3.6%
SUN	0.6%	BLUELIFE	-3.5%
IBLL	0.2%	CIEL	-2.1%
IOST.D1110	0.2%		
Most Active (Value)		Key Market Statistics	
MCBG	41.3 m	Market Cap (Rs)	256.8 bn
CIEL	26.7 m	Market Cap (USD)	5.7 bn
IOST.D1110	4.4 m	Market Div Yield	3.8%
IBLL	2.3 m	Market P/E	9.1x
SBMH	1.7 m	FI Participation	0.6x

Summary Market Data

		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,039.23	0.06%	2.3%	3.5%	
SEM-ASI	↓	1,887.04	-0.0%	1.9%	3.4%	
SEM-VWAP	↓	1,888.41	-0.04%	1.9%	3.4%	
SEM10	↓	370.37	-0.19%	1.4%	2.9%	
DEMEX	↑	254.58	0.3%	1.3%	1.7%	
Global Indices						
Japan: Nikkei 225	↑	32,238.89	0.6%	-0.5%	8.8%	
US: S&P 500	↓	4,437.86	-1.2%	-1.5%	7.3%	
UK: FTSE 100	↓	7,389.64	-1.6%	-0.60%	-5.0%	
Europe: Euro Stoxx 50	↓	4,288.57	-1.0%	-2.5%	-0.6%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	116,171.4	-0.5%	-1.3%	6.6%	
Russia: MICEX	↓	3,115.25	-0.5%	7.3%	19.3%	
India: SENSEX	→	65,401.92	-	-1.0%	4.9%	
China: Shanghai Comp	↓	3,176.18	-0.1%	-1.9%	-4.1%	
South Africa: JSE All Share	↓	75,590.77	-0.7%	-2.8%	-3.4%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	84.89	-1.5%	-10.7%	USDMUR	45.77	0.1%	-0.1%
Gold	↓	1,902.00	-0.3%	6.9%	EURMUR	50.42	0.1%	5.9%
Platinum	↓	892.53	-1.3%	-4.3%	GBPMUR	58.70	0.2%	4.6%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	323.00	322.52	8.05	32.3 m	34.2 m	0.2%	2.2%	-
IBLL	↑	44.90	44.85	26.10	-	-	0.2%	-0.2%	3.0%
SBMH	→	4.51	4.51	3.20	0.13 m	0.85 m	-	1.1%	-1.5%
AFREXIM	↓	2.65	2.72	4.39	-	-	-3.6%	-	1.9%
ENL	→	20.50	20.50	9.28	-	-	-	3.5%	2.5%
CIEL	↓	6.50	6.50	8.44	3.16 m	15.03 m	-2.1%	2.8%	2.8%
VIVO	→	310.75	311.25	17.34	-	-	-	1.9%	8.6%
ROGERS	→	30.15	30.15	7.87	-	-	-	0.5%	10.4%
ASCENCIA	→	20.50	20.50	9.95	-	-	-	3.0%	-2.1%
PBL	→	535.00	535.00	21.09	-	-	-	0.4%	1.5%
DEM Most Active (3-month average)									
ATTITUDE	→	11.45	11.45	11.2	-	-	-	6.5%	-
ABC Bank	→	21.60	21.60	8.18	-	-	-	2.9%	15.2%
ABC	→	112.00	112.00	12.98	-	-	-	-3.4%	-3.4%

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	NOVUS	DEM	Dividend	Final	0.22	23-Aug-23	15-Oct-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

Latest Announcements

Date	Company	Details
15-Aug-23	OMNICANE	Omnican Limited has decided to appoint Mr Jimmy Tong Sam as Chairman of the Company in replacement of Mr Harold Mayer who expressed the wish to step down as Chairman whilst remaining a member of the Board as Non-Executive Director.
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.

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