

MUA occupies 10.3% of market value traded

Semdex	↑	2,041.85	Sem-10	↓	370.19	Demex	↑	256.85
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The **SEMDEX** advances by 2.6 points to finish at 2,041.85 (+0.1%) with market value traded (MVT) amounting to Rs58.5m for a total volume traded (TVT) of 1.0m.

Foreign: **GRIT (USD)** ascends to USD0.37 (+5.7%) on only 400 units.

MUA remains flat at Rs98.50 on 61.4k units and captures 10.3% of total market value traded. The stock remained stable at Rs98.50 over the past five sessions. For the week so far, total value traded amounts to Rs7.3m.

Investments: **ALTEO** recovers to Rs8.96 (+4.2%). **ENL** inches down to Rs20.45 (-0.2%), **POLICY** slips to Rs3.50 (-1.4%) and **ROGERS** rises to Rs30.20 (+0.2%).

Finance: **MCBG** declines by -0.1% from its freshly recorded one-month high of Rs323.00. The stock closes at Rs322.75.

Foreign Investors (FI) are net sellers with FIP Rs31.0m and FIS Rs34.2m.

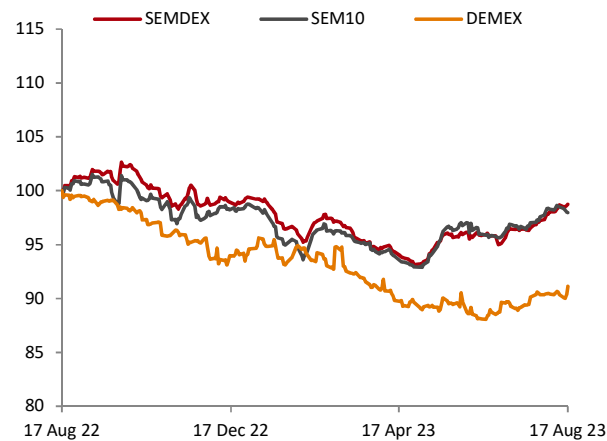
Commerce: **IBL** declines to Rs44.80 (-0.2%) on 116.5k units.

International equity markets: US stocks maintained the downtrend in yesterday's session. The Fed minutes from July's meeting was released yesterday, with central bank officials reiterating their commitment to tame inflation. However, the opinions of the officials regarding the next rate decision seemed divided, which made markets jitter. The S&P 500 fell by -0.8%, the Dow Jones Industrial Average (^DJI) down by -0.5% and Nasdaq declined by -1.0%.

Leisure & Hotel: **NMH** hits 52-week high of Rs10.45 (+6.0%).

Industry: **PBL** rises by +0.4% to finish at Rs537.00 on only 145 units.

Sugar: **OMNICANE** moves up to Rs25.00 (+0.4%).

Market Indices: 1 year Trend (Rebased 100)

Market Activity

Top gainers		Top losers	
NMH.O	6.0%	POLICY	-1.4%
GRIT (USD)	5.7%	NEWGOLD	-1.0%
ALTEO	4.2%	ENL	-0.2%
OMNICANE	0.4%	IBLL	-0.2%
PBL	0.4%	MCBG	-0.1%
Most Active (Value)		Key Market Statistics	
MCBG	39.3 m	Market Cap (Rs)	257.2 bn
MUA	6.0 m	Market Cap (USD)	5.7 bn
IBLL	5.2 m	Market Div Yield	3.8%
SBMH	1.6 m	Market P/E	9.1x
NMH.O	1.2 m	FI Participation	0.6x

Summary Market Data

		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,041.85	0.13%	2.4%	3.6%	
SEM-ASI	↑	1,892.36	0.3%	1.9%	3.3%	
SEM-VWAP	↑	1,893.69	0.28%	1.9%	3.4%	
SEM10	↓	370.19	-0.05%	1.5%	2.6%	
DEMEX	↑	256.85	0.9%	1.9%	2.4%	
Global Indices						
Japan: Nikkei 225	↓	31,766.82	-1.5%	-1.9%	6.4%	
US: S&P 500	↓	4,404.33	-0.8%	-2.2%	7.2%	
UK: FTSE 100	↓	7,356.88	-0.4%	-1.04%	-5.1%	
Europe: Euro Stoxx 50	↓	4,284.27	-0.1%	-2.6%	-0.7%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	115,591.5	-0.5%	-1.8%	6.8%	
Russia: MICEX	↓	3,049.46	-2.1%	5.1%	15.8%	
India: SENSEX	↑	65,539.42	0.2%	-0.8%	5.8%	
China: Shanghai Comp	↓	3,150.13	-0.8%	-2.7%	-4.3%	
South Africa: JSE All Share	↓	74,914.52	-0.9%	-3.6%	-3.9%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	83.45	-1.7%	-9.6%	USDMUR	45.85	0.2%	-0.1%
Gold	↓	1,891.81	-0.5%	6.5%	EURMUR	50.31	-0.2%	7.0%
Platinum	↓	887.57	-0.6%	-5.0%	GBPMUR	58.89	0.3%	5.5%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	322.75	322.75	8.04	27.9 m	28.3 m	-0.1%	2.5%	-0.7%
IBLL	↓	44.80	44.82	26.05	0.08 m	4.1 m	-0.2%	-0.4%	2.8%
SBMH	→	4.51	4.51	3.20	-	0.48 m	-	1.1%	-1.5%
AFREXIM	→	2.65	2.65	4.39	-	-	-	-	1.9%
ENL	↓	20.45	20.50	9.25	-	-	-0.2%	2.3%	2.3%
CIEL	→	6.50	6.50	8.44	-	-	-	3.2%	2.8%
VIVO	→	310.75	311.25	17.34	-	-	-	1.9%	7.1%
ROGERS	↑	30.20	30.18	7.89	-	-	0.2%	-0.3%	10.6%
ASCENCIA	→	20.50	20.50	9.95	-	0.728 m	-	3.0%	-2.1%
PBL	↑	537.00	537.00	21.17	-	-	0.4%	0.8%	1.7%
DEM Most Active (3-month average)									
ATTITUDE	↑	11.55	11.54	11.3	0.07 m	-	0.9%	7.4%	-
PHIN	↑	301.50	301.50	13.61	-	-	0.1%	0.5%	-2.7%
LFL.O	→	20.00	20.00	9.17	-	-	-	-1.5%	-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	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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