

MCBG increases to one-month high of Rs324.00

Semdex	↑	2,046.53	Sem-10	↑	370.71	Demex	↑	257.99
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The **SEMDEX** sustains the uptrend and progresses by 4.7 points to finish at 2,046.53 (+0.2%) with market value traded (MVT) amounting to Rs67.7m for a total volume traded (TVT) of 1.7m.

Investments: **ALTEO** inches up to Rs9.00 (+0.5%) on 29k units, **CIEL** moves up to Rs6.60 (+1.5%), **ENL** inches down to Rs20.25 (-1.0%) on 220.1k units, **FINCORP** up to Rs16.20 (+0.6%), **POLICY** recovers to Rs3.58 (+2.3%) and **TERRA** rises to Rs26.00 (+2.0%).

MCBG rises to one-month high of Rs324.00 (+0.4%) after slipping at Rs322.75 in yesterday's session. Value traded stands at Rs47.9m representing 70.8% of total market value traded for the day. FIS sits at Rs33.2m. The stock is up by +5.9% year-to-date.

Foreign Investors (FI) are net sellers with FIP Rs3m and FIS Rs39m.

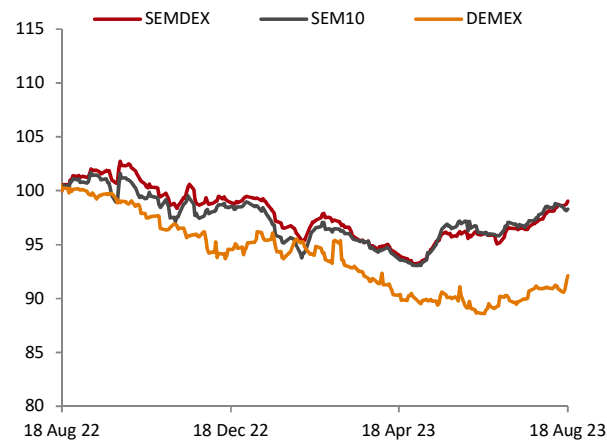
Finance: **CIM** inches up to three-month high of Rs10.30 (+1.0%) on 25.2k units.

International equity markets: US stocks finished in the red again. The unemployment claims for the week came at 239k, against expectations of 240k. The data further reinforces the fact that the labour market in the US is tight. The S&P 500 fell by -0.8%, the Dow Jones Industrial Average (^DJI) down by -0.8% and Nasdaq declined by -1.0%.

Commerce: **IBL** slips further to Rs44.50 (-0.7%) and **VIVO** records fresh 52-week high of Rs313.00 (+0.7%) on only 0.4k units.

Leisure & Hotel: **NMH** descends slightly to Rs10.35 (-1.0%). **SUN** gains +1.7% to close at Rs33.75.

Property: **BLL** rises further to Rs0.59 (+7.3%).

Market Indices: 1 year Trend (Rebased 100)

Market Activity

Top gainers		Top losers	
BLUELIFE	7.3%	ENL	-1.0%
POLICY	2.3%	NMH.O	-1.0%
TERRA	2.0%	IBLL	-0.7%
SUN	1.7%		
CIEL	1.5%		
Most Active (Value)		Key Market Statistics	
MCBG	47.9 m	Market Cap (Rs)	257.8 bn
ENL	4.5 m	Market Cap (USD)	5.7 bn
SBMH	3.1 m	Market Div Yield	3.8%
SBMH BondA	2.4 m	Market P/E	9.1x
CIEL	1.7 m	FI Participation	0.3x

Summary Market Data

		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,046.53	0.23%	2.7%	3.4%	
SEM-ASI	↑	1,895.61	0.2%	2.1%	3.2%	
SEM-VWAP	↑	1,898.07	0.23%	2.1%	3.3%	
SEM10	↑	370.71	0.14%	1.8%	2.3%	
DEMEX	↑	257.99	0.4%	2.4%	2.1%	
Global Indices						
Japan: Nikkei 225	↓	31,626.00	-0.4%	-2.4%	5.1%	
US: S&P 500	↓	4,370.36	-0.8%	-3.4%	5.1%	
UK: FTSE 100	↓	7,310.21	-0.6%	-1.30%	-5.3%	
Europe: Euro Stoxx 50	↓	4,227.83	-1.3%	-3.0%	-2.2%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	114,982.3	-0.5%	-2.7%	5.0%	
Russia: MICEX	↑	3,059.02	0.3%	4.8%	16.1%	
India: SENSEX	↓	65,151.02	-0.6%	-2.2%	5.8%	
China: Shanghai Comp	↑	3,163.74	0.4%	-1.4%	-3.7%	
South Africa: JSE All Share	↓	74,375.22	-0.7%	-3.7%	-5.1%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	84.12	0.8%	-10.2%	USDMUR	45.85	-	2.0%
Gold	↓	1,889.43	-0.1%	7.1%	EURMUR	50.39	0.2%	9.5%
Platinum	↑	896.89	1.1%	-3.2%	GBPMUR	58.95	0.1%	8.5%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	324.00	323.91	8.07	-	33.2 m	0.4%	2.5%	-0.3%
IBLL	↓	44.50	44.75	25.87	0.05 m	-	-0.7%	-1.1%	2.1%
SBMH	→	4.51	4.51	3.20	0.58 m	0.97 m	-	1.3%	-1.5%
AFREXIM	→	2.65	2.65	4.39	-	-	-	-3.6%	1.9%
ENL	↓	20.25	20.27	9.16	0.1 m	1.76 m	-1.0%	1.3%	1.3%
CIEL	↑	6.60	6.60	8.57	0.07 m	-	1.5%	4.8%	4.4%
VIVO	↑	313.00	313.00	17.47	-	-	0.7%	2.6%	7.8%
ROGERS	↑	30.20	30.18	7.89	-	-	0.2%	-0.3%	10.6%
ASCENCIA	→	20.50	20.50	9.95	-	-	-	3.0%	-2.1%
PBL	→	537.00	537.00	21.17	-	-	-	0.8%	1.7%
DEM Most Active (3-month average)									
LAVASTONE	↓	1.61	1.61	6.4	0.03 m	0.1 m	-10.6%	-0.6%	-
ABC Bank	→	21.60	21.60	8.2	-	-	-	2.9%	15.2%
ATTITUDE	↑	11.95	11.95	11.7	-	-	3.5%	11.2%	8.6%

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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For trading please contact:

T: (+230) 202 5850

E: mcbsb@mcbscm.mu
 MCB Stockbrokers Ltd
 Sir W. Newton St, Port Louis
www.mcbscm.mu