

NMH falls by -1.0%

Semdex	↑	2,049.88	Sem-10	↑	371.05	Demex	↑	259.43
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The **SEMDEX** rises slightly by 3.4 points to finish at 2,049.88 (+0.2%) with market value traded (MVT) amounting to Rs16.3m for a total volume traded (TVT) of 0.6m.

NMH declines further by -1.0% to close at Rs10.25 on 186k units. The stock snapped its 5-day winning streak in Friday's session and fell from its 52-week high of Rs10.45. It is currently up by +12.6% year-to-date.

Finance: **MCBG** closes flat at Rs324.00 on total value traded for the day amounting to Rs6.6m. **MUA** inches up to Rs99.50 on only 0.5k units.

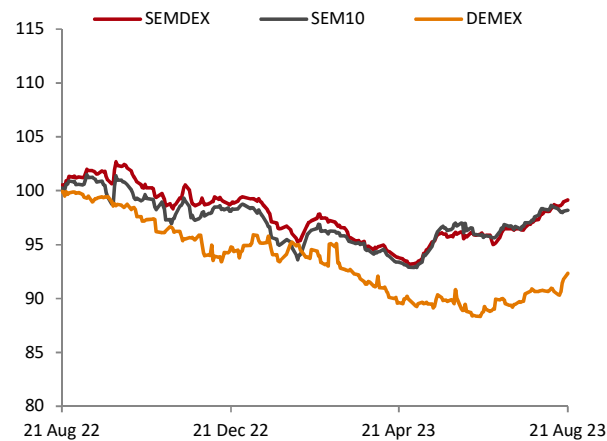
Leisure & Hotel: **LOTO** inches up to Rs7.60 (+1.3%) after stagnating at Rs7.50 over the last 7 sessions. **LUX** progresses by +1.3% to close at Rs57.75 on 0.4k units.

Investments: **ALTEO** records new six-month high of Rs9.50 (+5.6%) on 45.6k units, **CIEL** increases to Rs6.70 (+1.5%), **PAD**

Foreign Investors (FI) are net buyers with FIP Rs3.6m and FIS Rs2.7m.

International equity markets: US stocks ended mixed in Friday's session as investors anticipate that there might be further rate hikes on the table. The S&P 500 slipped by -0.01%, the Dow Jones Industrial Average (^DJI) inched up by +0.1% and Nasdaq fell by -0.2%. On the UK front, the Office for National Statistics (ONS) published the retail sales figure for the month of July, which fell by -1.2%. The slight decrease was driven by the rising cost of living and food prices.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
ALTEO	5.6%	PAD	-1.0%
CIEL	1.5%	NMH.O	-1.0%
LOTTO	1.3%	POLICY	-0.6%
LUX	1.3%		
MUA	1.0%		
Most Active (Value)		Key Market Statistics	
MCBG	6.6 m	Market Cap (Rs)	258.2 bn
NMH.O	1.9 m	Market Cap (USD)	5.7 bn
PAD	1.6 m	Market Div Yield	3.8%
FTPT.D0140	1.6 m	Market P/E	9.1x
SBM BD A2	0.5 m	FI Participation	0.2x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,049.88	0.16%	2.7%	3.4%	
SEM-ASI	↑	1,898.04	0.1%	1.5%	3.1%	
SEM-VWAP	↑	1,899.72	0.09%	1.8%	3.2%	
SEM10	↑	371.05	0.09%	1.2%	2.1%	
DEMEX	↑	259.43	0.6%	2.1%	2.2%	
Global Indices						
Japan: Nikkei 225	↓	31,450.76	-0.6%	-3.2%	2.9%	
US: S&P 500	↓	4,369.71	-0.0%	-4.1%	4.1%	
UK: FTSE 100	↓	7,262.43	-0.7%	-2.57%	-6.2%	
Europe: Euro Stoxx 50	↓	4,212.95	-0.4%	-3.6%	-3.5%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	115,408.5	0.4%	-2.1%	4.8%	
Russia: MICEX	↑	3,111.22	1.7%	5.3%	18.2%	
India: SENSEX	↓	64,948.66	-0.3%	-2.8%	5.7%	
China: Shanghai Comp	↓	3,131.95	-1.0%	-2.1%	-5.0%	
South Africa: JSE All Share	↓	73,080.87	-1.7%	-5.2%	-5.9%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↑	84.80	0.8%	-12.2%	USDMUR	⇒	45.85	-	-0.3%
Gold	↓	1,889.31	-0.0%	7.5%	EURMUR	↓	50.38	-0.0%	7.9%
Platinum	↑	914.58	2.0%	0.4%	GBPMUR	↑	58.98	0.1%	7.1%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	⇒	324.00	324.00	8.07	0.0 m	1.8 m	-	2.5%	-0.3%
IBLL	⇒	44.50	44.50	25.87	-	-	-	-1.1%	1.0%
SBMH	⇒	4.51	4.51	3.20	-	0.11 m	-	0.9%	-0.2%
AFREXIM	⇒	2.65	2.65	4.39	-	-	-	-3.6%	2.3%
ENL	⇒	20.25	20.25	9.16	-	0.24 m	-	-1.2%	2.3%
CIEL	↑	6.70	6.60	8.70	-	-	1.5%	3.1%	3.4%
VIVO	⇒	313.00	313.00	17.47	-	-	-	2.0%	8.1%
ROGERS	⇒	30.20	30.20	7.89	0.06 m	-	-	0.7%	10.6%
ASCENCIA	⇒	20.50	20.50	9.95	-	-	-	3.0%	-1.9%
PBL	⇒	537.00	537.00	21.17	-	-	-	0.4%	1.3%
DEM Most Active (3-month average)									
LAVASTONE	↑	1.65	1.65	6.6	-	-	2.5%	-8.3%	-
EUDCOS	⇒	14.00	14.01	5.8	-	-	-	-3.4%	-5.4%
ABC Bank	↓	21.50	21.50	8.1	-	-	-0.5%	2.4%	10.3%

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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