

SEMDEX inches down by -0.1%

Semdex	↓	2,047.76	Sem-10	↓	370.62	Demex	↓	258.81
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The **SEMDEX** snaps its 6-day winning streak as it finishes slightly lower at 2,047.76 (-0.1%) with market value traded (MVT) amounting to Rs40.3m for a total volume traded (TVT) of 9.4m.

Industry: **GAMMA** falls by -2.2% to close at Rs35.00. **PIM** slips to Rs40.60 (-1.0%) on only 0.6k units.

Leisure & Hotel: **ASL** inches up to Rs71.00 (+0.7%). **LOTO** shrugs off previous gains and declines to Rs7.50 (-3.4%). **SUN** edges up to 6-month high of Rs34.10 (+1.0%) on 27.3k units.

Property: **ASCENCIA** falls further to Rs20.10 (-1.7%) and **BLL** slips to Rs0.54 (-1.8%).

Investments: **CIEL** snaps winning streak and closes at Rs6.70 (-0.6%) and **ENL** rises to Rs20.45 (+1.0%) on 263.4k units, both contributing to 20.3% of total market value traded for the day. **FINCORP** rises further to Rs16.60 (+0.6%).

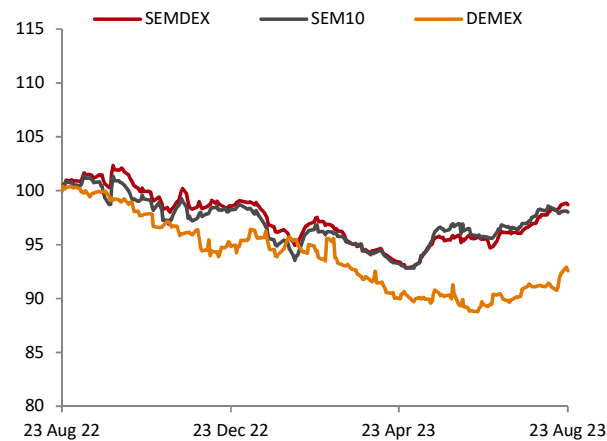
Sugar: **OMNICANE** moves lower to Rs24.00 (-4.0%) on 45.1k units.

GRIT (USD) declines to USD0.35 (-5.4%).

Foreign Investors (FI) are net sellers with FIP standing at Rs0.05m compared to FIS of Rs5.6m.

International equity markets: US stocks finished mixed. The US existing home sales data for the month of July came at 4.07m, dropping by -2.2% month-over-month. The National Association of Realtors commented that the rising interest rates contributed to the decline. The S&P 500 fell by -0.3%, the Dow Jones Industrial Average (^DJI) down by -0.5% and Nasdaq closed in the green territory.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
SUN	1.0%	GRIT (USD)	-5.4%
ENL	1.0%	OMNICANE	-4.0%
ASL	0.7%	LOTTO	-3.4%
FINCORP	0.6%	GAMMA	-2.2%
		BLUELIFE	-1.8%
Most Active (Value)		Key Market Statistics	
MCBG	25.3 m	Market Cap (Rs)	257.9 bn
ENL	5.3 m	Market Cap (USD)	5.7 bn
CIEL	2.8 m	Market Div Yield	3.8%
IBLL	2.3 m	Market P/E	9.1x
OMNICANE	1.1 m	FI Participation	0.1x

Summary Market Data

		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,047.76	-0.14%	2.5%	3.2%	
SEM-ASI	↓	1,894.32	-0.2%	1.3%	2.7%	
SEM-VWAP	↓	1,896.05	-0.26%	1.6%	2.8%	
SEM10	↓	370.62	-0.08%	1.1%	1.4%	
DEMEX	↓	258.81	-0.3%	1.9%	2.6%	
Global Indices						
Japan: Nikkei 225	↑	31,856.71	0.9%	-1.4%	2.5%	
US: S&P 500	↓	4,387.55	-0.3%	-3.3%	4.6%	
UK: FTSE 100	↑	7,270.76	0.2%	-5.13%	-6.4%	
Europe: Euro Stoxx 50	↑	4,260.37	0.8%	-3.0%	-2.9%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	116,156.0	1.5%	-3.4%	5.4%	
Russia: MICEX	↑	3,164.25	0.8%	8.2%	20.2%	
India: SENSEX	↑	65,220.03	0.0%	-2.2%	5.3%	
China: Shanghai Comp	↑	3,120.33	0.9%	-1.5%	-5.3%	
South Africa: JSE All Share	↓	73,277.88	-0.7%	-4.6%	-6.0%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	84.03	-0.5%	-16.2%	USDMUR	45.85	0.1%	2.8%
Gold	↑	1,897.48	0.1%	8.7%	EURMUR	50.26	-0.4%	12.8%
Platinum	↑	925.08	1.1%	4.7%	GBPMUR	59.02	-0.1%	12.2%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	⇒	324.00	324.00	8.07	-	-	-	2.6%	0.4%
IBLL	⇒	44.30	44.30	25.76	-	-	-	-1.6%	-0.6%
SBMH	⇒	4.51	4.51	3.20	0.05 m	0.23 m	-	0.7%	-0.9%
AFREXIM	⇒	2.65	2.65	4.39	-	-	-	-3.6%	2.3%
ENL	↑	20.45	20.25	9.25	-	5.25 m	1.0%	-0.2%	3.3%
CIEL	↓	6.70	6.71	8.70	-	0.03 m	-0.6%	3.1%	2.8%
VIVO	⇒	313.00	313.00	17.47	-	-	-	2.0%	7.9%
ROGERS	⇒	30.20	30.25	7.90	-	-	-	0.7%	10.6%
ASCENCIA	↓	20.10	20.10	9.76	-	-	-1.7%	0.5%	-0.5%
PBL	⇒	538.00	538.00	21.21	-	-	-	0.6%	1.3%
DEM Most Active (3-month average)									
LAVASTONE	⇒	1.65	1.65	6.6	-	-	-	-13.2%	-
MIWA	↓	0.28	0.28	0.0	-	-	-6.7%	-	-6.7%
CHSL	⇒	22.00	22.00	10.7	-	-	-	4.8%	9.5%

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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