

NMH hits new 52-week high

Semdex	↑	2,054.41	Sem-10	↑	371.82	Demex	↓	259.02
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The **SEMDEX** ends this week's session in the green at 2,054.41 (+0.2%) with market value traded (MVT) amounting to Rs34.1m for a total volume traded (TVT) of 2.9m.

NMH hits fresh 52-week high of Rs10.50, with value traded amounting to Rs2.7m. The stock fell to Rs10.30 in yesterday's session after stagnating at Rs10.35 over the two prior sessions. For the week so far, its total value traded amounts to Rs8.1m. The stock is up by +15.4% year-to-date.

Finance: **MCBG Pref** inches up to Rs10.35 (+1.5%) on only 0.1k units. **SBMH** slips further to Rs4.49 (-0.2%) on 2.2m units, with FIS standing at Rs3.4m compared to FIP of Rs4.6m.

Commerce: **INNODIS** trades ex-dividend at Rs34.65 (-3.8%) on 3.7k units, while **IBL** moves slightly higher to Rs44.50 (+0.5%).

Leisure & Hotel: **SUN** rises further by +2.9% to close at Rs36.00 on 3k units.

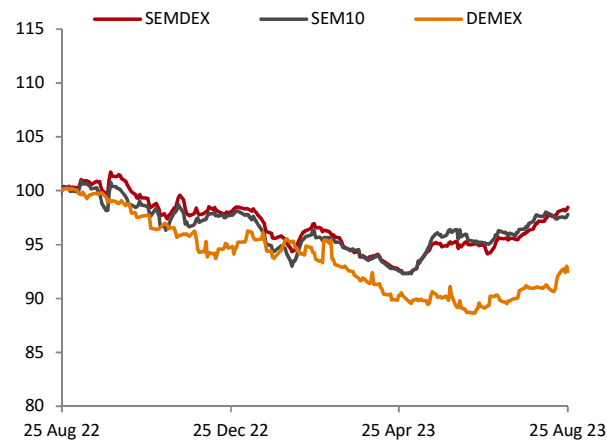
Property: **BLL** gains +9.3% to close at Rs0.59 on only 6.5k units.

Investments: **ALTEO** Rs9.96 (+1.6%), **CIEL** Rs6.80 (+0.6%), **NIT** Rs19.60 (-2.0%), **UTDL** Rs55.00 (-0.5%).

Foreign Investors (FI) remain net sellers with FIP Rs14.4m compared to FIS of Rs17.0m.

International equity markets: US stocks shrugged off gains and fell in the red territory in yesterday's session. Boston Fed President, Susan Collins signalled that rates will need to remain higher over an extended time frame to bring down inflation to the target of 2%. The S&P 500 declined by -1.4%, the Dow Jones Industrial Average (^DJI) down by -1.0% and Nasdaq fell by -1.9%.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BLUELIFE	9.3%	INNODIS	-3.8%
AFREXIM	3.4%	NIT	-2.0%
SUN	2.9%	UTDL	-0.5%
NMH.O	1.9%	SBMH	-0.2%
ALTEO	1.6%		
Most Active (Value)		Key Market Statistics	
MCBG	18.0 m	Market Cap (Rs)	258.8 bn
SBMH	9.8 m	Market Cap (USD)	5.7 bn
NMH.O	2.7 m	Market Div Yield	3.8%
CIEL	2.7 m	Market P/E	9.1x
ROGERS	0.2 m	FI Participation	0.5x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,054.41	0.20%	2.6%	3.5%	
SEM-ASI	↑	1,902.30	0.3%	1.6%	3.0%	
SEM-VWAP	↑	1,904.45	0.41%	1.6%	3.2%	
SEM10	↑	371.82	0.26%	1.4%	1.9%	
DEMEX	↓	259.02	-0.5%	1.7%	2.6%	
Global Indices						
Japan: Nikkei 225	↑	32,287.21	0.9%	-1.3%	5.2%	
US: S&P 500	↓	4,376.31	-1.3%	-3.9%	6.3%	
UK: FTSE 100	↑	7,333.63	0.2%	-4.49%	-3.8%	
Europe: Euro Stoxx 50	↓	4,232.22	-0.8%	-3.4%	-0.7%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	117,025.6	-0.9%	-3.6%	7.6%	
Russia: MICEX	↓	3,137.37	-0.3%	6.8%	18.2%	
India: SENSEX	↓	65,252.34	-0.3%	-1.7%	5.6%	
China: Shanghai Comp	↑	3,082.24	0.1%	-2.6%	-3.8%	
South Africa: JSE All Share	↑	74,301.56	0.4%	-3.2%	-1.7%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	83.36	0.2%	-16.8%	USDMUR	46.00	0.3%	3.1%
Gold	↑	1,916.91	0.1%	9.8%	EURMUR	50.08	-0.5%	12.1%
Platinum	↑	938.16	0.5%	6.2%	GBPMUR	58.37	-0.9%	10.4%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	⇒	324.00	324.03	8.07	8.1 m	13.5 m	-	2.5%	0.6%
IBLL	↑	44.50	44.50	25.87	-	-	0.5%	-1.0%	-0.1%
SBMH	↓	4.49	4.49	3.19	4.56 m	3.42 m	-0.2%	0.2%	-1.1%
AFREXIM	↑	2.75	2.75	4.55	-	-	3.4%	-1.8%	5.8%
ENL	⇒	20.00	20.00	9.05	-	0.03 m	-	-	1.0%
CIEL	↑	6.80	6.80	8.83	-	0.00 m	0.6%	0.6%	6.6%
VIVO	⇒	313.00	313.00	17.47	-	-	-	1.9%	7.9%
ROGERS	↑	31.00	31.00	8.09	-	-	2.5%	3.7%	3.7%
ASCENCIA	⇒	20.10	20.10	9.76	-	-	-	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%	-
BEE	↑	18.25	18.25	2.5	0.002 m	-	7.4%	49.0%	102.8%
ATTITUDE	↓	11.75	11.75	11.5	0.01 m	-	-1.7%	6.8%	6.8%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
25-Aug-23	CSE	DEM	Dividend	Final	5.00	11-Sep-23	5-Oct-23
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

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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