

NMH: +36.3% year-to-date

Semdex ↑ 2,072.58 Sem-10 ↑ 373.86 Demex ↑ 260.46

The **SEMDEX** advances by 12.6 points to finish at 2,072.58 (+0.6%) with market value traded (MVT) amounting to Rs23.2m for a total volume traded (TVT) of 0.9m.

Foreign Investors (FI) are net sellers with FIP standing at Rs2.5m compared to FIS of Rs2.7m.

NMH extends winning streak to a third session, jumping by +13.2% day-on-day to close at a new 52-week high of Rs12.40. Value traded for the day amounts to Rs2.5m, accounting for 10.6% of total market value traded. The stock is currently up by +36.3% year-to-date.

International equity markets: US stocks moved higher in the green territory as investors brace for the release of key economic data this week. The street is expecting further rate hikes, albeit fears of recession have dissipated. The S&P 500 moved up +0.6%, the Dow Jones Industrial Average (^DJI) up by +0.6% and Nasdaq rose by +0.8%.

Industry: **PIM** inches up to Rs41.00 (+1.0%) on only 0.2k units.

Economic Data releasing this week:

Leisure & Hotel: **LOTO** rises to Rs7.60 (+1.3%) on 64.1k units, **NMH Pref** moves up to Rs11.50 (+1.3%) on 1.7k units and **SUN** closes higher at Rs37.00 (+2.8%).

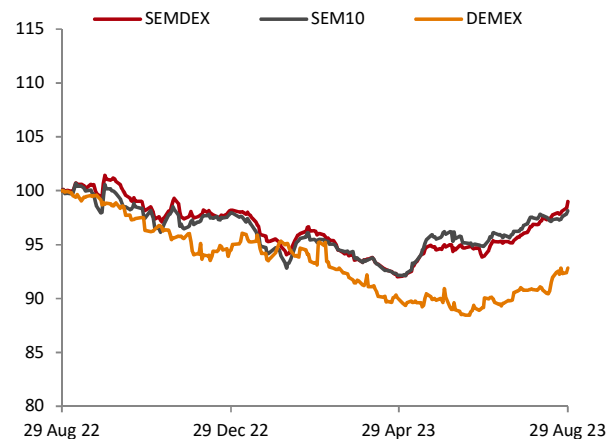
US: Job Openings and Labor Turnover Survey (JOLTS) Openings (July), Preliminary GDP for the second quarter, Unemployment rate (August).

Property: **BLL** slips to Rs0.57 (-3.4%) on 20.5k units.

EUROPE: Preliminary Consumer Price Index (CPI) y/y (August)

Investments: **ALTEO** Rs9.98 (+0.4%), **BMH** Rs23.20 (-0.2%), **CIEL** Rs7.04 (+3.2%), **ENL** Rs20.50 (+2.5%), **ROGERS** Rs31.05 (+0.2%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
SCT NT 7Y	23.2%	BLUELIFE	-3.4%
NEWGOLD	20.0%	BMH	-0.2%
NMH.O	13.2%		
CIEL	3.2%		
SUN	2.8%		
Most Active (Value)		Key Market Statistics	
MUA	6.0 m	Market Cap (Rs)	261.0 bn
MCBG	4.2 m	Market Cap (USD)	5.7 bn
NMH.O	2.5 m	Market Div Yield	3.8%
ENL	2.4 m	Market P/E	9.2x
CMDC	1.5 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,072.58	0.61%	3.1%	4.6%	
SEM-ASI	↑	1,917.06	0.5%	2.3%	4.1%	
SEM-VWAP	↑	1,916.10	0.42%	2.2%	4.0%	
SEM10	↑	373.86	0.30%	1.4%	2.6%	
DEMEX	↑	260.46	0.5%	2.3%	3.1%	
Global Indices						
Japan: Nikkei 225	↑	32,169.99	1.7%	-1.8%	4.1%	
US: S&P 500	↑	4,433.31	0.6%	-3.2%	5.4%	
UK: FTSE 100	→	7,338.58	-	-4.62%	-3.8%	
Europe: Euro Stoxx 50	↑	4,293.69	1.4%	-3.9%	-1.0%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	117,121.0	1.1%	-2.6%	5.6%	
Russia: MICEX	↑	3,198.72	1.3%	6.3%	19.3%	
India: SENSEX	↑	64,996.60	0.2%	-1.8%	4.0%	
China: Shanghai Comp	↑	3,098.64	1.1%	-5.4%	-3.5%	
South Africa: JSE All Share	↑	75,079.61	1.7%	-4.4%	-2.0%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	84.42	-0.1%	-16.4%	USDMUR	↓	45.97	-0.0%	3.0%
Gold	↑	1,920.17	0.3%	10.6%	EURMUR	↑	50.28	0.1%	10.5%
Platinum	↑	971.55	2.4%	12.5%	GBPMUR	↑	58.61	0.2%	8.9%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	⇒	324.00	324.00	8.07	-	-	-	2.2%	-0.2%
IBLL	⇒	44.60	44.60	25.93	-	-	-	-0.9%	-0.9%
SBMH	⇒	4.50	4.50	3.20	-	0.77 m	-	0.4%	1.1%
AFREXIM	⇒	2.85	2.85	4.72	-	0.06 m	-	-	7.5%
ENL	↑	20.50	20.50	9.28	-	-	2.5%	3.5%	3.8%
CIEL	↑	7.04	6.97	9.14	-	-	3.2%	4.1%	10.3%
VIVO	⇒	313.00	313.00	17.47	-	0.1 m	-	1.3%	7.4%
ROGERS	↑	31.05	31.00	8.11	-	-	0.2%	3.5%	8.9%
ASCENCIA	⇒	20.15	20.15	9.78	-	-	-	0.2%	-0.2%
PBL	⇒	538.00	538.00	21.21	-	-	-	-0.4%	3.3%
DEM Most Active (3-month average)									
EUDCOS	↑	14.80	14.78	6.1	-	-	5.7%	5.3%	-
ABC Bank	↓	21.45	21.45	8.1	-	-	-0.2%	1.7%	9.7%
BEE	↓	19.00	19.15	2.6	-	-	-2.3%	46.2%	111.1%

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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