

Property stocks close in the green territory

Semdex ↓ 2,062.33 Sem-10 ↑ 372.56 Demex ↑ 266.20

The **SEMDEX** moves lower by -0.1% to end this week's session at 2,062.33 with market value traded (MVT) amounting to Rs22.2m for a total volume traded (TVT) of 0.6m. The **DEMEX** remains nearly unchanged at 266.20 (+0.02%).

Sugar: **OMNICANE** slips to Rs22.00 (-3.9%).

GRIT (USD) closes higher at USD0.29 (+3.6%) on 1k units.

Property: **ASCENCIA** progresses to Rs19.00 (+2.7%), **BLL** rises to Rs0.55 (+1.9%) on 61k units.

International equity markets: US equities closed mixed following the release of the Fed's preferred gauge of inflation, the Core Personal Consumption Expenditures (PCE) index. The inflation print for the month of October showed that prices rose by 3.5% year-over-year (September: 3.7%). Inflation in the US seems to be on the downtrend, nevertheless economists are expecting it to remain sticky over the coming months. The S&P 500 inched up by +0.4%, the Dow Jones Industrial Average (^DJI) added +1.5%, while Nasdaq slipped by -0.2%.

Finance: **MCBG** slips to Rs329.00 (-0.3%) on 18.2k units.

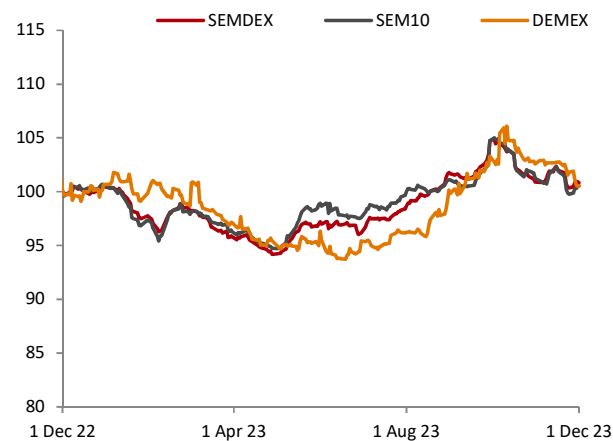
Commerce: **INNODIS** moves lower to Rs35.05 (-0.3%), **VIVO** adds +0.5% to close at Rs328.25 on 0.5k units.

Industry: **GAMMA** closes lower at Rs34.50 (-1.4%), **PBL** down to Rs524.00 (-1.0%), **UBP** edges lower to Rs104.25 (-0.2%).

Investments: **ALTEO** falls to Rs10.05 (-3.4%), **CIEL** retreats to Rs6.96 (-0.6%), **ENL** inches up to Rs20.25 (+0.3%), **FINCORP** Rs16.00 (-2.7%), **NIT** up to Rs18.00 (+3.5%).

Leisure & Hotels: **LUX** advances to Rs56.50 (+0.4%), **SUN** gains +0.4% to close at Rs38.15 on 4.1k units.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
GRIT (USD)	3.6%	OMNICANE	-3.9%
NIT	3.4%	ALTEO	-3.4%
ASCENCIA	2.7%	FINCORP	-2.7%
BLUELIFE	1.9%	GAMMA	-1.4%
NEWGOLD	1.7%	PBL	-0.9%
Most Active (Value)		Key Market Statistics	
MCBG	6.0 m	Market Cap (Rs)	259.8 bn
CMSP2	4.4 m	Market Cap (USD)	5.9 bn
ENL	2.5 m	Market Div Yield	4.2%
IOST.D1110	2.0 m	Market P/E	6.5x
PBL	1.2 m	FI Participation	0.2x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,062.33	-0.11%	-0.1%	-0.8%	
SEM-ASI	↑	1,890.66	0.0%	-0.6%	-2.1%	
SEM-VWAP	↑	1,893.05	0.10%	-0.6%	-2.0%	
SEM10	↑	372.56	0.07%	-0.7%	-0.5%	
DEMEX	↑	266.20	0.0%	-2.0%	0.7%	
Global Indices						
Japan: Nikkei 225	↑	33,486.89	0.5%	9.1%	3.6%	
US: S&P 500	↑	4,567.80	0.4%	9.6%	1.2%	
UK: FTSE 100	↑	7,453.75	0.4%	1.72%	-0.3%	
Europe: Euro Stoxx 50	↑	4,382.47	0.3%	8.8%	1.6%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	127,331.1	0.9%	13.2%	8.3%	
Russia: MICEX	↓	3,165.79	-0.2%	-1.9%	-1.5%	
India: SENSEX	↑	66,988.44	0.1%	4.5%	2.9%	
China: Shanghai Comp	↑	3,029.67	0.3%	0.3%	-3.4%	
South Africa: JSE All Share	↑	75,534.36	0.4%	8.1%	0.4%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	80.86	-2.7%	-5.3%	USDMUR	44.60	0.1%	1.1%
Gold	↓	2,036.41	-0.4%	14.8%	EURMUR	49.06	-0.6%	6.4%
Platinum	↓	929.53	-0.6%	-10.9%	GBPMUR	56.88	-0.4%	6.5%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-I10									
MCBG	↓	329.00	329.58	5.72	-	-	-0.3%	0.2%	1.5%
IBLL	→	44.95	44.95	9.99	-	-	-	-0.1%	0.8%
SBMH	→	4.59	4.58	3.26	-	-	-	2.0%	2.0%
AFREXIM	→	2.85	2.85	4.72	-	-	-	0.7%	-
GRIT (USD)	↑	0.29	0.28	-	-	0.01 m	3.6%	-19.4%	-27.5%
CIEL	↓	6.96	6.70	4.27	-	-	-0.6%	3.9%	-2.0%
LUX	↑	56.50	56.25	5.29	-	-	0.4%	-0.9%	0.9%
ROGERS	→	31.40	31.40	4.94	-	-	-	-1.9%	4.0%
ASCENCIA	↑	19.00	18.50	8.49	0.002 m	-	2.7%	0.5%	-8.2%
PBL	↓	524.00	529.00	11.89	-	0.5 m	-0.9%	-2.4%	-2.6%
DEM Most Active (3-month average)									
MIWA	→	0.36	1.54	6.2	-	-	-	-	-
LAVASTONE	↓	1.53	17.65	7.8	0.002 m	-	-0.6%	-4.4%	-9.5%
ABC Bank	↓	18.80	10.40	13.2	-	-	-0.3%	-12.1%	-12.4%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
15-Nov-23	MUA	Official	Dividend	Final	2.10	29-Nov-23	20-Dec-23
15-Nov-23	TERRA	Official	Dividend	Final	1.05	30-Nov-23	15-Dec-23
14-Nov-23	ENL	Official	Dividend	Interim	0.55	29-Nov-23	29-Dec-23
14-Nov-23	MOROIL	Official	Dividend	Interim	0.50	29-Nov-23	22-Dec-23

Latest Announcements

Date	Company	Details
28-Nov-23	CTIL	The Board of Directors of Cavell Touristic Investments Ltd is pleased to announce that on 27 November 2023, the Listing Executive Committee of the Stock Exchange of Mauritius Limited granted its approval for the admission of 11,259,388 no par value ordinary shares of CTIL on the Development & Enterprise Market of the SEM by way of an introduction.
23-Nov-23	SBMH	SBM Holdings Ltd (SBMH), the ultimate Holding company of SBM Bank (Mauritius) Ltd (SBMBM or the Bank), wishes to inform its shareholders and the public in general that Mr Premchand Mungar has been appointed as the Chief Executive Officer (CEO) of SBMBM effective 22 November 2023.

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