

### Hotel stocks on the rise

**Semdex** 2,064.71 **Sem-10** 372.64 **Demex** 266.53

The **SEMDEX** reverses losses and rises by 2.38 points to finish at 2,064.71 (+0.1%) with market value traded (MVT) amounting to Rs40.6m for a total volume traded (TVT) of 1.6m. The **DEMEX** inches up to 266.53 (+0.1%).

Hotel stocks close in the green territory and account for 39.1% of total market value traded for the day. **NMH** moves up to Rs10.65 (+1.9%) on 50k units, **LUX** advances to Rs57.00 (+0.9%) on 160.7k units, **SUN** gains +0.9% to close at Rs38.50 on 163.5k units.

Finance: **MCBG** slips by -0.3% to close at Rs328.00 on 12.5k units, **SBMH** declines to Rs4.55 (-0.9%) on 377.1k units.

Commerce: **IBL** rises to Rs45.00 (+0.1%).

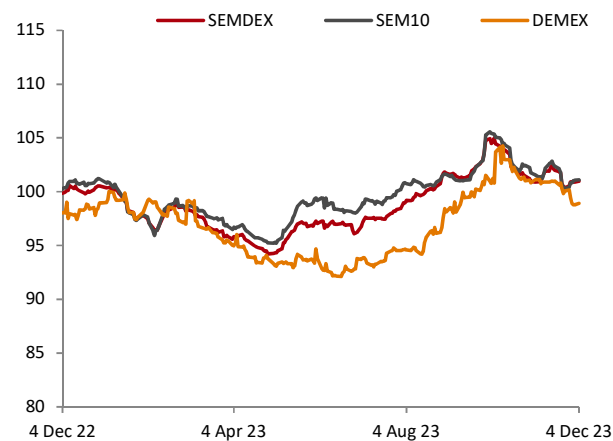
Industry: **PIM** drops by -4.9% to Rs37.50.

Investments: **ALTEO** edges higher to Rs10.35 (+3.0%), **UTDL** moves up to Rs56.00 (+0.5%).

Property: **ASCENCIA** advances to Rs19.60 (+3.2%) on 1.1k units.

**International equity markets:** US equities started the month of December in the green territory. The US Manufacturing PMI published by the Institute for Supply Management (ISM) came at 46.7, showing the 13<sup>th</sup> month of contraction. Fed Chair, Jerome Powell, gave a speech at the Spelman College in Atlanta signaling that it would be premature to make assumptions about rate cuts and kept rate hikes on the table. The S&P 500 inched up by +0.6%, the Dow Jones Industrial Average (^DJ) added +0.8%, while Nasdaq rose by +0.6%.

### Market Indices: 1 year Trend (Rebased 100)



### Market Activity

Top gainers		Top losers	
ASCENCIA	3.2%	PIM	-4.9%
ALTEO	3.0%	SBMH	-0.9%
NMH.O	1.9%	MCBG	-0.3%
SUN	0.9%		
LUX	0.9%		

Most Active (Value)		Key Market Statistics	
LUX	9.1 m	Market Cap (Rs)	260.1 bn
MUA	7.1 m	Market Cap (USD)	5.9 bn
SUN	6.3 m	Market Div Yield	4.2%
MCBG	4.1 m	Market P/E	6.5x
CMPSP2	3.9 m	FI Participation	0.3x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX		2,064.71	0.12%	0.1%	-0.6%	
SEM-ASI		1,892.82	0.1%	-0.3%	-1.8%	
SEM-VWAP		1,895.07	0.11%	-0.4%	-1.7%	
SEM10		372.64	0.02%	-0.5%	-0.3%	
DEMEX		266.53	0.1%	-2.2%	0.4%	
<b>Global Indices</b>						
Japan: Nikkei 225		33,431.51	-0.2%	5.8%	2.2%	
US: S&P 500		4,594.63	0.6%	8.4%	1.7%	
UK: FTSE 100		7,529.35	1.0%	2.55%	0.9%	
Europe: Euro Stoxx 50		4,418.51	0.8%	8.0%	3.2%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA		128,184.9	0.7%	11.4%	8.7%	
Russia: MICEX		3,142.29	-0.7%	-2.0%	-2.8%	
India: SENSEX		67,481.19	0.7%	6.1%	3.2%	
China: Shanghai Comp		3,031.64	0.1%	0.3%	-3.2%	
South Africa: JSE All Share		75,705.85	0.2%	8.6%	1.2%	

Commodities				Currencies				
		Closing	ID Δ	12M Δ		Closing	ID Δ	12M Δ
Oil (Brent)	↓	78.88	-2.4%	-9.2%	USDMUR	44.72	0.3%	1.4%
Gold	↑	2,072.22	1.8%	15.0%	EURMUR	48.94	-0.2%	4.7%
Platinum	↑	937.15	0.8%	-10.0%	GBPMUR	57.03	0.3%	6.6%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
<b>SEM-10</b>									
MCBG	↓	328.00	328.51	5.69	-	0.3 m	-0.3%	-0.2%	1.2%
IBLL	↑	45.00	44.95	10.00	-	-	0.1%	-	1.1%
SBMH	↓	4.55	4.55	3.23	1.71 m	1.71 m	-0.9%	1.6%	1.1%
AFREXIM	⇒	2.85	2.85	4.72	-	-	-	0.7%	1.8%
GRIT (USD)	⇒	0.29	0.29	-	-	-	-	-17.1%	-27.5%
CIEL	⇒	6.96	6.96	4.43	-	-	-	3.9%	-0.6%
LUX	↑	57.00	56.53	5.36	1.695 m	-	0.9%	1.3%	1.8%
ROGERS	⇒	31.40	31.40	4.94	-	-	-	-1.9%	4.0%
ASCENCIA	↑	19.60	19.59	8.99	-	-	3.2%	3.7%	-5.3%
PBL	⇒	524.00	527.05	11.78	-	-	-	-2.4%	-2.6%
<b>DEM Most Active (3-month average)</b>									
LAVASTONE	↑	1.58	0.36	9.0	-	-	3.3%	-4.2%	-
MIWA	⇒	0.36	1.58	6.3	-	-	-	-	20.0%
ATTITUDE	↑	10.80	18.80	4.8	-	-	3.8%	4.3%	-9.2%

#### 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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