

Domestic indices move lower

Semdex	↓	2,061.17	Sem-10	↓	369.92	Demex	↓	266.24
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The **SEMDEX** slips by 3.54 points to close at 2,061.17 (-0.2%) with market value traded (MVT) amounting to Rs26.0m for a total volume traded (TVT) of 2.0m. The **SEM-10** declines by -0.7% to end at 369.92 and is currently down by -0.8% year-to-date. The **DEMEX** inches down to 266.24 (-0.1%).

GRIT (USD) drops to USD0.27 (-7.0%) on 25.9k units.

Finance: **MCBG** falls further to Rs326.00 (-0.6%) on 19.1k units.

International equity markets: US equities reversed Friday's gains with investors awaiting the release of key labor-market figures. It is expected that the unemployment rate in the US will remain unchanged at 3.9% in November. The S&P 500 inched lower by -0.5%, the Dow Jones Industrial Average (^DJI) down by -0.1% and Nasdaq fell by -0.8%. The Caixin China Services Purchasing Managers Index (PMI) rose to 51.5 in November, beating estimates of 50.5 and showing that the services sector has expanded for the 11th consecutive month.

Commerce: **IBL** inches down to Rs44.95 (-0.1%) on 12.8k units.

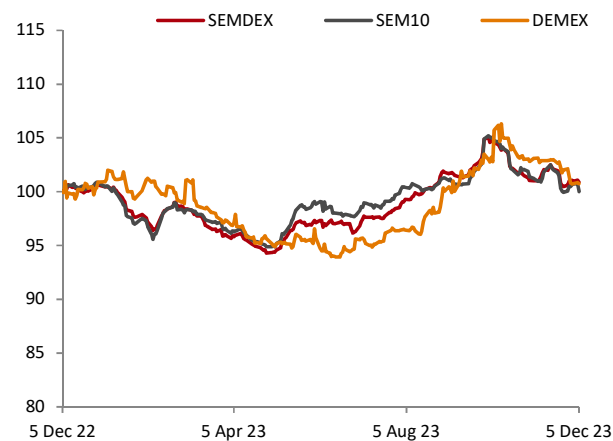
Industry: **PBL** retreats to Rs520.00 (-0.8%), **MOROIL** rises slightly to Rs17.30 (+0.3%) on 1.5k units.

Leisure & Hotels: **LOTO** falls to Rs7.20 (-0.3%) on 61.8k units, **NMH** jumps to Rs11.75 (+10.3%) on 26.1k units, **LUX** reverses gains and closes lower at Rs56.00 (-1.8%).

Investments: **ALTEO** tumbles to Rs10.00 (-3.4%), **CAUDAN** moves lower to Rs0.52 (-1.9%), **CIEL** declines to Rs6.94 (-0.3%) on 45.6k units, **ENL** Rs20.20 (-0.3%), **FINCORP** Rs16.10 (+0.6%), **ROGERS** Rs31.35 (-0.2%), **UTDL** Rs58.00 (+3.6%).

Property: **ASCENCIA** retreats to Rs19.25 (-1.8%) on 5.9k units.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
NMH.O	10.3%	GRIT (USD)	-6.9%
UTDL	3.6%	ALTEO	-3.4%
FINCORP	0.6%	CAUDAN	-1.9%
MOROIL	0.3%	ASCENCIA	-1.8%
		LUX	-1.8%
Most Active (Value)		Key Market Statistics	
LUX	7.2 m	Market Cap (Rs)	259.6 bn
MCBG	6.2 m	Market Cap (USD)	5.9 bn
SBMH	5.8 m	Market Div Yield	4.2%
MCBG-FLN7Y	1.0 m	Market P/E	6.5x
SUN	0.8 m	FI Participation	0.2x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,061.17	-0.17%	-0.1%	-0.8%	
SEM-ASI	↓	1,888.18	-0.2%	-0.6%	-2.1%	
SEM-VWAP	↓	1,888.77	-0.33%	-0.7%	-2.1%	
SEM10	↓	369.92	-0.73%	-1.2%	-1.1%	
DEMEX	↓	266.24	-0.1%	-2.3%	0.5%	
Global Indices						
Japan: Nikkei 225	↓	33,231.27	-0.6%	4.0%	0.9%	
US: S&P 500	↓	4,569.78	-0.5%	4.9%	1.2%	
UK: FTSE 100	↓	7,512.96	-0.2%	1.28%	0.8%	
Europe: Euro Stoxx 50	↓	4,414.95	-0.1%	5.8%	3.2%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	126,802.8	-1.1%	7.3%	7.7%	
Russia: MICEX	↓	3,114.41	-0.9%	-2.9%	-4.7%	
India: SENSEX	↑	68,865.12	2.1%	7.0%	4.9%	
China: Shanghai Comp	↓	3,022.91	-0.3%	-0.3%	-4.9%	
South Africa: JSE All Share	↑	75,941.06	0.3%	4.2%	0.8%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	78.03	-1.1%	-8.8%	USDMUR	⇒	44.72	-	1.4%
Gold	↓	2,029.42	-2.1%	12.9%	EURMUR	⇒	48.94	-	4.7%
Platinum	↓	921.38	-1.7%	-9.2%	GBPMUR	⇒	57.03	-	6.6%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-I10									
MCBG	↓	326.00	326.42	5.65	-	-	-0.6%	-0.8%	0.9%
IBLL	↓	44.95	44.95	9.99	-	-	-0.1%	-0.1%	1.0%
SBMH	⇒	4.55	4.55	3.23	5.22 m	2.43 m	-	1.6%	2.2%
AFREXIM	⇒	2.85	2.85	4.72	0.0 m	0.05 m	-	0.7%	1.8%
GRIT (USD)	↓	0.27	0.27	-	-	0.24 m	-6.9%	-22.9%	-22.9%
CIEL	↓	6.94	6.96	4.42	-	-	-0.3%	3.6%	-0.3%
LUX	↓	56.00	56.27	5.27	-	-	-1.8%	-0.4%	-
ROGERS	↓	31.35	31.38	4.93	-	-	-0.2%	-2.0%	3.8%
ASCENCIA	↓	19.25	19.27	8.83	-	-	-1.8%	1.9%	-7.0%
PBL	↓	520.00	520.00	11.69	-	-	-0.8%	-3.2%	-3.3%
DEM Most Active (3-month average)									
ABC Bank	↑	19.00	19.00	4.9	-	1.8 m	1.1%	-11.2%	-
LAVASTONE	↓	1.55	1.55	6.2	-	-	-1.9%	-6.1%	-6.1%
MIWA	↓	0.35	0.35	8.8	0.00 m	0.44 m	-2.8%	-2.8%	16.7%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
5-Dec-23	SWAN GENERAL	Official	Dividend	Final	17.50	19-Dec-23	16-Jan-24
5-Dec-23	SWAN LIFE	DEM	Dividend	Final	69.00	19-Dec-23	16-Jan-24
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

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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