

NMH reverses recent gains

Semdex ↓ 2,055.28 Sem-10 ↓ 370.77 Demex ↑ 269.15

The **SEMDEX** extends its losses, declining by 4.92 points to finish today's session at 2,055.28 (-0.2%) with market value traded (MVT) amounting to Rs29.0m for a total volume traded (TVT) of 0.5m. The **DEMEX** rises slightly to 269.15 (+0.3%).

hourly earnings and unemployment rate published by the Bureau of Labor Statistics on Friday will provide a clearer picture of the current labor market in the US. The S&P 500 fell by -0.4%, the Dow Jones Industrial Average (^DJI) down by -0.2% and Nasdaq declined by -0.6%.

NMH features as top laggard for the day, dropping by -7.2% to close lower at Rs10.90 on 7.7k units. The stock remained stagnant at Rs11.75 over the past two sessions.

Finance: **MCBG** closes flat at Rs326.00 on 73.9k units and accounts for 83.1% of total market value traded for the day.

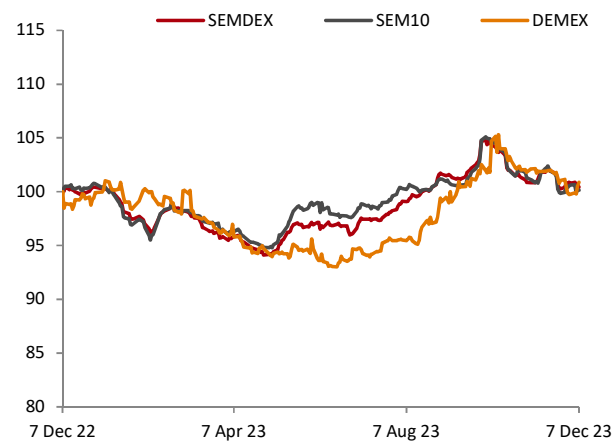
Leisure & Hotels: **ASL** retreats to Rs70.00 (-0.4%) on 0.4k units.

Property: **BLL** slips to Rs0.54 (-1.8%) on 21.4k units.

Investments: **CIEL** Rs6.90 (-0.6%), **ENL** Rs20.15 (-0.3%), **MDIT** Rs2.02 (+2.5%), **POLICY** Rs2.98 (-0.3%), **TERRA** Rs22.00 (-1.1%).

International equity markets: US equities continue to decline following the release of the US ADP non-farm employment data for the month of November. Private payrolls increased by 103k, below expectations of 131k. The non-farm employment change, average

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
MDIT	2.5%	NMH.O	-7.2%
		NIT	-3.3%
		BLUELIFE	-1.8%
		TERRA	-1.1%
		CIEL	-0.6%
Most Active (Value)		Key Market Statistics	
MCBG	24.1 m	Market Cap (Rs)	258.9 bn
ROGERS	1.4 m	Market Cap (USD)	5.9 bn
CIEL	0.5 m	Market Div Yield	4.2%
SBMH	0.5 m	Market P/E	6.5x
SBM BD A2	0.5 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,055.28	-0.24%	-0.5%	-1.0%	
SEM-ASI	↓	1,885.95	-0.3%	-0.6%	-1.7%	
SEM-VWAP	↓	1,885.27	-0.27%	-0.6%	-1.7%	
SEM10	↓	370.77	-0.07%	-0.8%	-0.6%	
DEMEX	↑	269.15	0.3%	-0.8%	0.9%	
Global Indices						
Japan: Nikkei 225	↑	33,445.90	2.0%	2.3%	0.6%	
US: S&P 500	↓	4,549.34	-0.4%	4.2%	1.9%	
UK: FTSE 100	↑	7,515.38	0.3%	1.32%	1.2%	
Europe: Euro Stoxx 50	↑	4,483.26	0.7%	7.8%	5.8%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	125,622.7	-1.0%	6.1%	8.3%	
Russia: MICEX	↓	3,079.50	-1.6%	-4.8%	-5.1%	
India: SENSEX	↑	69,653.73	0.5%	7.2%	5.7%	
China: Shanghai Comp	↓	2,968.93	-0.1%	-2.9%	-6.0%	
South Africa: JSE All Share	↑	75,400.62	0.2%	2.9%	1.3%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	74.30	-3.8%	-10.1%	USDMUR	⇒	44.55	-	1.0%
Gold	↑	2,025.55	0.3%	14.5%	EURMUR	↓	48.38	-0.2%	4.3%
Platinum	↓	892.27	-1.2%	-10.6%	GBPMUR	↓	56.42	-0.4%	4.7%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	⇒	326.00	326.00	5.65	-	5.5 m	-	-1.2%	0.9%
IBLL	⇒	45.00	45.00	10.00	-	-	-	-	1.1%
SBMH	⇒	4.55	4.55	3.23	-	-	-	1.8%	2.2%
AFREXIM	⇒	2.85	2.85	4.72	-	-	-	0.7%	1.8%
GRIT (USD)	⇒	0.30	0.27	-	-	-	-	-9.1%	-16.7%
CIEL	↓	6.90	6.91	4.39	-	0.35 m	-0.6%	4.5%	1.5%
LUX	⇒	56.00	56.00	5.27	-	-	-	-0.4%	-
ROGERS	⇒	31.35	31.35	4.93	-	-	-	-0.2%	3.8%
ASCENCIA	⇒	19.00	19.00	8.72	-	-	-	1.3%	-8.2%
PBL	⇒	520.00	520.00	11.69	-	-	-	-3.2%	-3.3%
DEM Most Active (3-month average)									
LAVASTONE	↓	1.54	1.54	6.2	-	0.0 m	-0.6%	-8.3%	-
PHIN	↓	312.25	312.25	7.9	-	-	-0.2%	2.6%	3.2%
ABC Bank	⇒	19.00	19.00	4.9	-	-	-	-11.2%	-11.4%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
7-Dec-23	MCOS	DEM	Dividend	Final	0.10	22-Dec-23	31-Jul-24 & 30-Sep-24
6-Dec-23	CIMO	DEM	Dividend	Final	0.57	20-Dec-23	27-Dec-23
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

Latest Announcements

Date	Company	Details
7-Dec-23	CIEL	The Board of Directors of CIEL Limited wishes to inform its shareholders and the public in general that Mr. Jean-Pierre Dalais has decided to retire as Group Chief Executive of CIEL on 30 June 2024. The Board has appointed Mr. Guillaume Dalais as the new Group Chief Executive of CIEL, effective as from 01 July 2024. Mr. Guillaume Dalais had been nominated Deputy Group Chief Executive on 01 January 2023.
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.

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