

**VIVO hits fresh 52-week high of Rs307.00**

Semdex	↑	1,996.89	Sem-10	↑	366.59	Demex	↑	254.04
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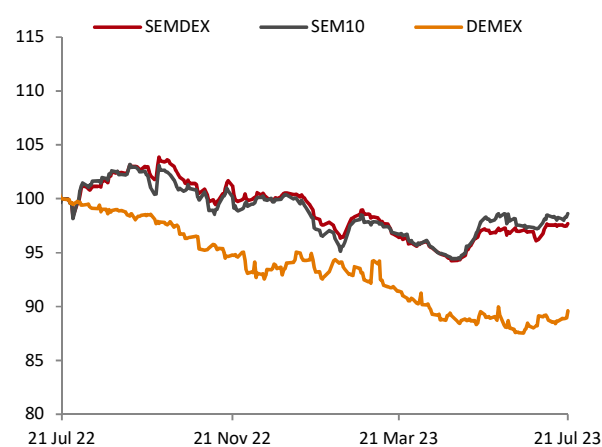
Domestic markets end this week's session higher. The **SEMDEX** rises by 4.57 points to end at 1,996.89. On the commerce side, **VIVO** rises by +0.7% to close at fresh 52-week high of Rs307.00. Leisure and hotel stocks finish mixed with **LOTO** hitting new six-month high of Rs7.50 (+2.5%) on 40.1k units, **NMH (Pref)** trades ex-div at Rs12.45 (-0.8%) and **SUN** declines to Rs31.25 (-0.8%). On the DEM, **C-CARE** moves up to Rs9.90 (+1.0%), **LAVA** rises to Rs1.90 (+5.6%), **SWAN LIFE** ends at Rs1,600 (+6.7%), while **CIMO** falls to Rs22.25 (-3.1%).

**International equity markets:** US stocks ended mixed on disappointing tech earnings that were released yesterday. Additionally, US unemployment claims fell to a 2-month low of 228k, signalling that the labour market is still tight with less people filing for unemployment. The unemployment claims have been on a gradual decline since the past 3 weeks. Markets are pricing in a higher probability that the Fed will hike rates by 25 bps in its upcoming meeting. The S&P 500 slipped by -0.4%, the Dow Jones Industrial Average (^DJI) up by +0.7% and Nasdaq fell by -2.0%.

**Investments:** **CIEL** (Rs6.50 +3.5%), **ENL** (Rs20.50, +1.5%), **PAD** (Rs99.50, +0.5%).

The SEMDEX ends at 1,996.89 with market value traded (MVT) amounting to Rs11.7m for a total volume traded (TVT) of 0.7m.

**Foreign Investors (FI)** are **buyer** with FIS Rs3.2m and FIP Rs4.9m.

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

**Market Activity**

Top gainers		Top losers	
CIEL	3.5%	NMH.P	-0.8%
LOTTO	2.5%	SUN	-0.8%
ENL	1.5%		
VIVO	0.7%		
PAD	0.5%		
Most Active (Value)		Key Market Statistics	
MCBG	6.6 m	Market Cap (Rs)	251.5 bn
CIEL	2.2 m	Market Cap (USD)	5.5 bn
SBMH	0.9 m	Market Div Yield	3.9%
VIVO	0.3 m	Market P/E	9.0x
LOTTO	0.3 m	FI Participation	0.3x

**Summary Market Data**

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↑	1,996.89	0.23%	0.7%	3.0%	
SEM-ASI	↑	1,870.29	0.2%	1.3%	3.7%	
SEM-VWAP	↑	1,865.41	0.17%	0.9%	3.4%	
SEM10	↑	366.59	0.30%	1.4%	3.9%	
DEMEX	↑	254.04	0.8%	1.9%	0.9%	
<b>Global Indices</b>						
Japan: Nikkei 225	↓	32,490.52	-1.2%	-2.7%	14.1%	
US: S&P 500	↓	4,534.87	-0.7%	3.3%	9.8%	
UK: FTSE 100	↑	7,646.05	0.8%	1.01%	-3.2%	
Europe: Euro Stoxx 50	↑	4,373.73	0.3%	0.7%	-0.3%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↑	118,082.9	0.5%	-1.3%	13.1%	
Russia: MICEX	↓	2,917.48	-0.9%	4.1%	10.6%	
India: SENSEX	↑	67,571.90	0.7%	6.7%	13.3%	
China: Shanghai Comp	↓	3,169.52	-0.9%	-2.2%	-5.9%	
South Africa: JSE All Share	↓	77,016.83	-0.1%	0.3%	-2.4%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	79.64	0.2%	-20.1%	USDMUR	45.85	0.2%	1.3%
Gold	↓	1,969.53	-0.4%	15.2%	EURMUR	51.47	-0.5%	12.7%
Platinum	↓	959.96	-1.6%	13.1%	GBPMUR	59.51	-0.3%	10.7%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-I0</b>									
MCBG	⇒	316.00	316.00	7.87	4.1 m	4.1 m	-	0.3%	3.3%
IBLL	⇒	45.00	45.00	26.16	-	-	-	1.8%	2.7%
SBMH	⇒	4.47	4.48	3.17	0.70 m	-	-	-0.2%	0.4%
AFREXIM	⇒	2.75	2.75	4.55	-	-	-	4.2%	6.2%
ENL	↑	20.50	20.21	9.28	-	-	1.5%	4.6%	2.2%
CIEL	↑	6.50	6.45	8.44	-	0.00 m	3.5%	-	5.9%
VIVO	↑	307.00	307.00	17.13	-	-	0.7%	4.4%	8.0%
ROGERS	↓	30.00	30.00	7.83	-	-	-1.0%	-	7.7%
ASCENCIA	⇒	19.90	19.90	9.66	-	-	-	-	-7.0%
PBL	⇒	535.00	535.00	21.09	-	-	-	-	1.9%
<b>DEM Most Active (3-month average)</b>									
BEE	⇒	12.00	12.00	1.6	-	-	-	27.1%	-
CHSL	⇒	21.00	21.00	10.24	-	-	-	4.5%	4.5%
MFDG	⇒	15.00	15.00	31.91	-	-	-	15.4%	14.5%

### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
6-Jul-23	NMH PREF	Official	Dividend	Final	1.65	21-Jul-23	24-Aug-23
4-Jul-23	MDIT	Official	Dividend	Final	0.07	21-Sep-23	29-Sep-23
30-Jun-23	CIEL	Official	Dividend	Final	0.28	17-Jul-23	31-Jul-23
30-Jun-23	PAD	Official	Dividend	Interim	1.00	17-Jul-23	2-Aug-23

### Latest Announcements

Date	Company	Details
20-Jul-23	CIM	CIM has completed the acquisition of a controlling stake in Loinette Capital Limited, post regulatory approval.
14-Jul-23	MCBG	MCBG has announced the issue of additional notes, by way of preferential offer, for an aggregate nominal amount of up to MUR 2,500,000,000 under one or more applicable pricing supplements to be issued pursuant to its Updated Programme Memorandum. The proceeds raised shall be used to refinance existing indebtedness. Terms and conditions of New Notes are still being finalized.

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