

### The SEMDEX end today's session in the green

Semdex ↑ 1,932.26      Sem-10 ↑ 351.97      Demex ↑ 251.49

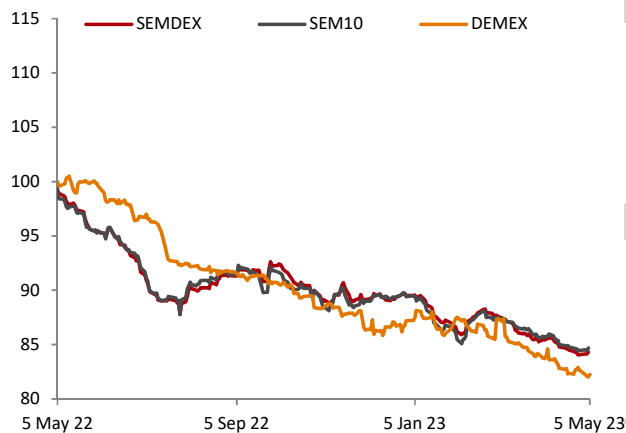
Domestic markets end this week's session in the green. The **SEMDEX** moves higher to 1,932.26 (+0.2%). Finance stocks **SBM** rises slightly to Rs4.59 (+2.9%) on 337.4k units. Commerce stock **HAREL** slips to Rs30.00 (-7.7%). Industry stocks close higher with **GAMMA** up to Rs36.50 (+0.7%) and **UBP** moves higher to Rs111.25 (+0.2%). Leisure and Hotels stocks ended mixed with **LOTO** down to Rs6.20 (-0.3%) and **LUX** inches up to Rs45.30 (+0.7%). Property stock **ASCENCIA** falls to Rs20.90 (-0.2%). **OMNICANE** rises to Rs23.00 (+4.6%). On the DEM, **CIMO** jumps to Rs23.00 (+15.0%) and **ABCB** inches down to Rs18.50 (-2.6%).

**Investment stocks:** **ALTEO** recovers to Rs8.26 (+2.0%) on 109.2k units, **CAUDAN** up to Rs0.66 (+6.5%) on 27.5k units, **CIEL** recovers further to Rs6.20 (+0.3%), **POLICY** up to Rs2.56 (+0.4%) on 28.4k units and **TERRA** declines to Rs23.25 (-3.1%) on 72.4k units.

**International equity markets:** US stocks closed in the red territory yesterday. The latest rate hike from the Fed has put further pressure on regional banks which closed lower. On the European front, ECB raised its rates by 25bps. Inflation in the Eurozone came at 7.0% in April and is still far from ECB's target of 2%. The S&P 500 slipped by -0.7%, the Dow Jones Industrial Average (^DJI) fell by -0.8%, and NASDAQ was down by -0.5%.

The SEMDEX rises to 1,932.26 (+0.2%), with market value traded (MVT) amounting to Rs45.5m for a total volume traded (TVT) of 1.6m.

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



### Market Activity

Top gainers		Top losers	
CAUDAN	6.5%	CIM.D1114	-21.2%
OMNICANE	4.5%	H MALLAC	-7.7%
SBMH	2.9%	TERRA	-3.1%
KING.D1116	2.0%	LOTTO	-0.3%
NEWGOLD	2.0%	ASCENCIA	-0.2%
Most Active (Value)		Key Market Statistics	
MCBG	28.2 m	Market Cap (Rs)	242.4 bn
CIM.D1114	4.4 m	Market Cap (USD)	5.4 bn
TERRA	1.7 m	Market Div Yield	3.7%
SBMH	1.5 m	Market P/E	8.8x
MSE.D1104	1.4 m		

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	<span style="color: green;">↑</span>	1,932.26	0.20%	-1.3%	-2.7%	
SEM-ASI	<span style="color: green;">↑</span>	1,797.34	0.3%	-1.2%	-2.9%	
SEM-VWAP	<span style="color: green;">↑</span>	1,796.30	0.16%	-1.4%	-2.9%	
SEM10	<span style="color: green;">↑</span>	351.97	0.29%	-1.2%	-1.7%	
DEMEX	<span style="color: green;">↑</span>	251.49	0.3%	-2.0%	-6.0%	
<b>Global Indices</b>						
Japan: Nikkei 225	<span style="color: green;">↑</span>	29,157.95	0.1%	4.0%	6.4%	
US: S&P 500	<span style="color: red;">↓</span>	4,061.22	-0.7%	-1.0%	-1.8%	
UK: FTSE 100	<span style="color: red;">↓</span>	7,702.64	-1.1%	0.89%	-2.5%	
Europe: Euro Stoxx 50	<span style="color: red;">↓</span>	4,287.03	-0.5%	-0.7%	0.7%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	<span style="color: green;">↑</span>	102,174.0	0.4%	0.3%	-5.8%	
Russia: MICEX	<span style="color: red;">↓</span>	2,524.51	-0.3%	1.8%	12.3%	
India: SENSEX	<span style="color: green;">↑</span>	61,749.25	0.9%	4.5%	1.5%	
China: Shanghai Comp	<span style="color: green;">↑</span>	3,350.46	0.8%	1.1%	2.7%	
South Africa: JSE All Share	<span style="color: red;">↓</span>	77,271.13	-1.2%	-0.2%	-3.7%	

Commodities		Closing	ID Δ	I2M Δ	Currencies		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	75.32	-5.0%	-30.0%	USDMUR	⇒	45.70	-	5.3%
Gold	↑	2,016.56	1.7%	6.3%	EURMUR	↓	50.65	-0.4%	10.3%
Platinum	↑	1,064.00	1.4%	14.3%	GBPMUR	↑	57.86	0.2%	6.4%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	⇒	305.00	304.92	7.60	10.6 m	-	-	-1.3%	0.7%
IBLL	⇒	43.25	43.25	25.15	-	-	-	-2.0%	-10.8%
SBMH	↑	4.59	4.46	3.26	0.07 m	-	2.9%	1.5%	-32.5%
AFREXIM	⇒	2.59	2.59	4.29	-	-	-	-	-4.1%
ENL	⇒	20.00	20.00	9.05	0.3 m	-	-	-	-
CIEL	↑	6.20	6.18	8.03	0.30 m	-	0.3%	0.3%	3.7%
VIVO	⇒	286.25	286.25	15.97	-	-	-	0.8%	7.6%
GRIT (USD)	⇒	0.28	0.28	10.69	-	-	-	-6.7%	-17.6%
ASCENCIA	↓	20.90	20.90	10.15	-	-	-0.2%	-2.3%	-7.1%
PBL	⇒	526.00	526.00	20.73	-	-	-	-0.8%	2.1%
<b>DEM Most Active (3-month average)</b>									
MIWA	⇒	0.32	0.32	0.0	-	-	-	18.5%	-
EUDCOS	⇒	14.80	14.80	6.09	-	-	-	8.0%	4.2%
ABC Bank	↓	18.50	18.49	7.01	-	-	-2.6%	1.4%	2.8%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
3-Apr-23	ADBF	Official	Dividend	Final	USD 0.30	19-Apr-23	08-May-23
31-Mar-23	GAMMA	Official	Dividend	Final	1.75	18-Apr-23	10-May-23
31-Mar-23	KOLOS	DEM	Dividend	Final	1.77	18-Apr-23	05-May-23
29-Mar-23	SBMH	Official	Dividend	Interim	0.20	12-May-23	15-Jun-23

#### Latest Announcements

Date	Company	Details
25-Apr-23	HAREL	Shareholders of Harel Mallac have approved a value of Rs36.00 for each ordinary share of Cavell Touristic Investments Ltd (CTIL) which will be distributed in the ratio 1:1, subject to the regulatory approval for the listing of the ordinary shares of CTIL on the DEM.
19-Apr-23	INNODIS	Innodis will be implementing a Note Programme for an aggregate amount of Rs200m to refinance its 15 months notes issued on the 21st December 2021 for Rs200m, which matured on 21st March 2023.

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#### For trading please contact:

Ashveen Chummun T: (+230) 202 5776  
Derek Sum Ping T: (+230) 202 5456  
Khamlesh Beeharry T: (+230) 202 6063

E: mcbsb@mcbscm.mu  
MCB Stockbrokers Ltd  
Sir W. Newton St, Port Louis  
www.mcbscm.mu