

Property stocks end in the green

Semdex ↑ 1,947.72 Sem-10 ↓ 355.12 Demex ↑ 251.58

Domestic markets finish today's session higher. The **SEMDEX** inches upwards to 1,947.72 (+0.03%). Finance stocks ended mixed with **MCBG** rising further to Rs312.25 (+0.1%) on 22.2k units, **SWAN GENERAL** moves up to Rs451.25 (+0.1%) and **SBMH** inches down to Rs4.51 (-1.7%) on 100.2k units. Industry stock **UBP** moves down to Rs111.00 (-0.2%). Property stocks **ASCENCIA** rises to Rs20.95 (+0.2%) on 37.3k units and **BLL** moves up to Rs0.56 (+5.6%). Leisure & Hotel stocks ended mixed with **NMH** down to Rs8.16 (-0.2%) on 38.4k units and **LUX** up to Rs47.00 (+3.8%) on 27.1k units. On the DEM, **TPL (Ord)** jumps Rs3.90 (+14.7%), **C-CARE** moves up to Rs9.30 (+2.2%), **PHIN** declines to Rs310.00 (-1.9%) and **LAVA** slips further to Rs1.87 (-3.6%) on 41.0k units.

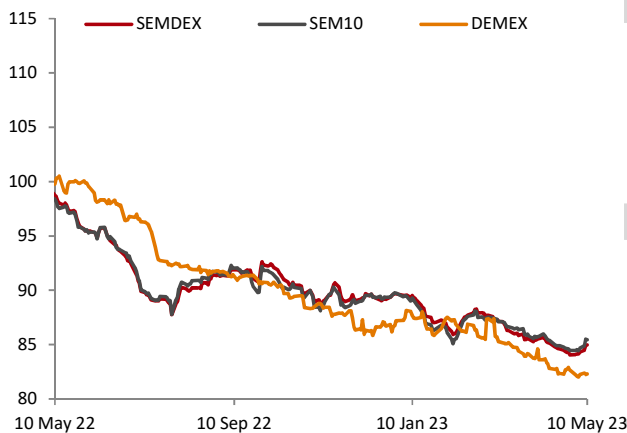
Foreign Investors (FI) are buyer with FIS Rs0.4m and FIP Rs0.9m

Investment stocks: **BMH** down to Rs21.50 (-1.2%), **CIEL** recovers to Rs6.16 (+0.3%) on 580.4k units, **ENL** down to Rs19.75 (-0.3%), **FINCORP** down to Rs15.00 (-0.7%), **MDIT** down to Rs1.98 (-1.0%) and **POLICY** recovers to Rs2.60 (+1.2%).

International equity markets: US markets closed lower following the release of the CPI figures by the US Bureau of Labour Statistics. US Headline CPI for the month of April rose by 4.9% year-over-year. Core US CPI was up by 5.5% year-over-year. The S&P 500 slipped by -0.6%, the Dow Jones Industrial Average (^DJI) declined by -0.7%, and NASDAQ was down by -0.6%.

The SEMDEX inches higher to 1,947.72 (+0.03%), with market value traded (MVT) amounting to Rs23.8m for a total volume traded (TVT) of 1.3m.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BLUELIFE	5.6%	CIM.D1114	-1.7%
LUX	3.8%	BMH	-1.1%
POLICY	1.2%	MDIT	-1.0%
KING.D1116	0.3%	FINCORP	-0.7%
ASCENCIA	0.2%	ENL	-0.3%

Most Active (Value)		Key Market Statistics	
MCBG	6.9 m	Market Cap (Rs)	244.3 bn
CIM.D1114	4.2 m	Market Cap (USD)	5.4 bn
CIEL	3.6 m	Market Div Yield	3.7%
IBLL	2.1 m	Market P/E	8.8x
MSE.D1104	1.3 m	FI Participation	2.3%

Summary Market Data

		Closing	1D Δ	1M Δ	3M Δ	1 year trend
Mauritius						
SEMDEX	↑	1,947.72	0.03%	-0.8%	-1.6%	
SEM-ASI	↑	1,809.10	0.0%	-0.8%	-2.0%	
SEM-VWAP	↑	1,811.16	0.36%	-0.8%	-1.9%	
SEM10	↓	355.12	-0.08%	-0.6%	-0.4%	
DEMEX	↑	251.58	0.0%	-1.6%	-5.1%	
Global Indices						
Japan: Nikkei 225	↑	29,157.95	0.7%	6.0%	5.7%	
US: S&P 500	↓	4,119.17	-0.5%	0.3%	0.9%	
UK: FTSE 100	↓	7,764.09	-0.2%	0.29%	-1.9%	
Europe: Euro Stoxx 50	↓	4,323.09	-0.6%	0.3%	1.7%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	107,113.7	1.0%	6.2%	-0.6%	
Russia: MICEX	↓	2,527.59	-0.4%	0.8%	12.2%	
India: SENSEX	↓	61,761.33	-0.0%	3.2%	1.6%	
China: Shanghai Comp	↓	3,357.67	-1.1%	0.9%	2.7%	
South Africa: JSE All Share	↓	77,776.86	-1.0%	0.9%	-2.8%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↑	77.37	0.5%	-26.5%	USDMUR	⇒	45.75	-	5.4%
Gold	↑	2,023.38	0.1%	9.1%	EURMUR	⇒	50.49	-	9.3%
Platinum	↑	1,110.00	3.4%	16.0%	GBPMUR	↑	58.01	0.1%	7.7%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	312.25	312.13	7.78	-	-	0.1%	0.4%	3.1%
IBLL	⇒	43.50	43.50	25.29	0.13 m	-	-	-1.1%	-7.4%
SBMH	↓	4.51	4.51	3.20	-	-	-1.7%	0.2%	-33.7%
AFREXIM	⇒	2.59	2.59	4.29	-	-	-	-	-2.3%
ENL	↓	19.75	19.77	8.94	-	-	-0.3%	-5.7%	-7.5%
CIEL	↑	6.16	6.14	8.00	0.24 m	-	0.3%	-	2.7%
VIVO	⇒	286.25	286.25	15.97	-	-	-	0.8%	7.1%
GRIT (USD)	⇒	0.28	0.28	10.69	-	-	-	-6.7%	-22.2%
ASCENCIA	↑	20.95	20.90	10.17	-	-	0.2%	-2.1%	-0.2%
PBL	⇒	526.00	526.00	20.73	-	-	-	-0.8%	9.6%
DEM Most Active (3-month average)									
MIWA	⇒	0.32	0.32	0.0	-	-	-	6.7%	-
PHIN	↓	310.00	313.86	14.00	-	-	-1.9%	-3.1%	-16.0%
VELG	⇒	23.25	23.25	12.50	-	-	-	-5.1%	-7.0%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
8-May-23	VIVO	Official	Dividend	Interim	2.61	23-May-23	16-Jun-23
4-May-23	COVIFRA	DEM	Dividend	Interim	1.00	19-May-23	13-Jun-23
3-May-23	GIL	DEM	Dividend	Interim	1.50	18-May-23	19-Jun-23
3-Apr-23	ADBF	Official	Dividend	Final	USD 0.30	19-Apr-23	8-May-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