

MCBG closes flat at Rs328.50

Semdex	↓	2,063.29	Sem-10	↓	374.42	Demex	↑	272.46
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The **SEMDEX** inches down by 0.62 points to end this week's session at 2,063.29 (-0.03%) with market value traded (MVT) amounting to Rs64.6m for a total volume traded (TVT) of 0.4m. **DEMEX** rises by +0.3% to 272.46.

Foreign Investors (FI) are net sellers with FIS amounting to Rs4.7m.

International equity markets: US stocks closed higher in yesterday's session. The yield on the US 10-year Treasury Note pulled back to 4.7%. The S&P 500 gained +1.9%, the Dow Jones Industrial Average (^DJI) rose by +1.7% and Nasdaq added +1.8%. Markets will be focusing on the unemployment data to be released by the Bureau of Labor Statistics today, which is expected to remain unchanged at 3.8% month-over-month. On the UK front, the Bank of England has decided to keep rates unchanged at 5.25%, following similar moves from the US Fed and the ECB.

MCBG closes flat at Rs328.50 on 22.9k units. Total value traded for the day amounts to Rs7.5m, with FIS of Rs4.1m. The stock is currently trading at a PE of 5.7x and is up by +7.0% year-to-date.

Finance: **SBMH** slips to Rs4.48 (-0.4%) on 67.4k units. **MUA** falls further to Rs99.00 (-0.5%)

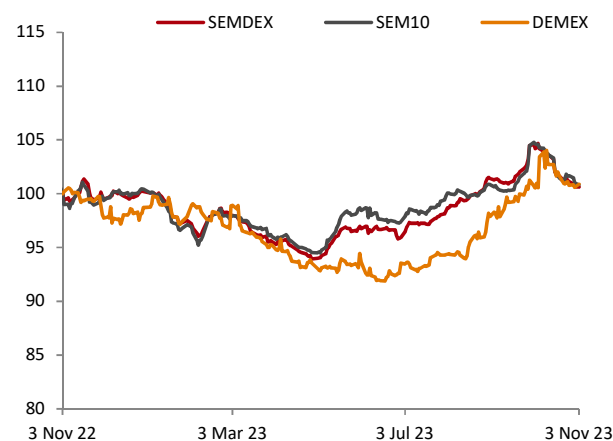
Leisure & Hotels: **NMH** moves slightly up to Rs10.40 (+0.5%) on 11.7k units.

Property: **BLL** reverses previous gains and falls to Rs0.55 (-3.5%).

Investments: **BMH** Rs23.40 (+1.3%), **FINCORP** Rs16.75 (-1.5%), **PAD** Rs103.75 (+0.2%).

GRIT(USD) tumbles to USD0.35 (-2.8%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BMH	1.3%	GRIT (USD)	-2.8%
NMH.O	0.5%	FINCORP	-1.5%
PAD	0.2%	MUA	-0.5%
		SBMH	-0.4%
		H MALLAC	-0.3%
Most Active (Value)		Key Market Statistics	
SBMH BondA	33.0 m	Market Cap (Rs)	259.9 bn
SBM BD A2	20.0 m	Market Cap (USD)	5.9 bn
MCBG	7.5 m	Market Div Yield	4.2%
TERRA	1.6 m	Market P/E	6.5x
MCBGPREF	0.7 m	FI Participation	0.0x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,063.29	-0.03%	-3.4%	2.0%	
SEM-ASI	↓	1,899.01	-0.1%	-3.2%	0.9%	
SEM-VWAP	↓	1,902.98	-0.05%	-3.3%	1.1%	
SEM10	↓	374.42	-0.17%	-3.6%	0.8%	
DEMEX	↑	272.46	0.3%	0.3%	6.8%	
Global Indices						
Japan: Nikkei 225	↑	31,949.89	1.1%	0.6%	-2.3%	
US: S&P 500	↑	4,317.78	1.9%	0.7%	-4.3%	
UK: FTSE 100	↑	7,446.53	1.4%	-0.85%	-1.5%	
Europe: Euro Stoxx 50	↑	4,169.62	1.9%	0.8%	-3.8%	
Emerging Market Indices						
Brazil: IBOVESPA	→	115,053.0	-	-0.0%	-4.8%	
Russia: MICEX	↓	3,197.22	-0.3%	2.1%	2.9%	
India: SENSEX	↑	64,080.90	0.8%	-2.7%	-2.6%	
China: Shanghai Comp	↓	3,009.41	-0.5%	-3.2%	-7.7%	
South Africa: JSE All Share	↑	71,383.92	2.4%	0.2%	-6.7%	

Commodities					Currencies				
		Closing	ID Δ	12M Δ			Closing	ID Δ	12M Δ
Oil (Brent)	↑	86.85	2.6%	-8.0%	USDMUR	→	44.70	-	0.8%
Gold	↑	1,985.78	0.2%	21.5%	EURMUR	↑	47.95	0.3%	9.7%
Platinum	↓	925.35	-0.2%	-0.5%	GBPMUR	↑	55.05	0.5%	8.5%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
SEM-10									
MCBG	→	328.50	328.50	5.70	-	4.1 m	-	-2.5%	2.7%
IBLL	→	45.00	45.00	10.00	-	-	-	-2.7%	-1.1%
SBMH	↓	4.48	4.50	3.18	-	0.10 m	-0.4%	-4.7%	0.7%
AFREXIM	→	2.83	2.83	4.69	-	-	-	-0.7%	-4.1%
GRIT (USD)	↓	0.35	0.35	-	-	0.12 m	-2.8%	-10.3%	-
CIEL	→	6.70	6.70	4.27	-	-	-	-5.6%	-1.2%
LUX	→	59.00	59.04	5.55	-	-	-	-1.7%	12.4%
ROGERS	→	31.50	31.50	4.95	-	-	-	-1.6%	4.5%
ASCENCIA	→	18.90	18.90	8.67	-	-	-	-12.9%	-5.5%
PBL	→	537.00	537.00	12.07	-	-	-	-0.4%	-0.6%
DEM Most Active (3-month average)									
ATTITUDE	↓	10.35	10.35	13.1	-	-	-1.4%	-13.0%	-
LAVASTONE	↑	1.65	1.65	6.6	-	-	3.1%	6.5%	-2.9%
LFL.O	→	17.75	17.90	7.9	-	-	-	-11.3%	-12.1%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
28-Sep-23	MCBG	Official	Dividend	Final	11.75	22-Nov-23	22-Dec-23
28-Sep-23	MCBG PREF	Official	Dividend	Final	0.235	29-Nov-23	29-Dec-23
28-Sep-23	FINCORP	Official	Dividend	Final	0.65	21-Nov-23	21-Dec-23
28-Sep-23	PAD	Official	Dividend	Final	3.50	24-Nov-23	26-Dec-23

Latest Announcements

Date	Company	Details
27-Oct-23	ENL	The board of directors of ENL Limited is pleased to inform the shareholders and the public in general that (i) the Listing Executive Committee of the Stock Exchange of Mauritius Ltd has, on 27 October 2023, approved the offer for subscription and listing of secured fixed rate notes and secured floating rate notes for an aggregate nominal amount of up to MUR 2,500,000,000 on the Official Market of the SEM, and (ii) the Financial Services Commission has, on 26 October 2023, also approved the registration of the prospectus pertaining to the Notes, deemed to be the listing particulars.
18-Oct-23	ASCENCIA	The Board of Ascencia Limited wishes to inform that Mr. Frédéric Tyack will be stepping down from his position as Chief Executive Officer to take on new challenges. While this decision will be effective December 31, 2023, Mr. Tyack will be working alongside the company's management team under a consultancy agreement until December 2024, ensuring a smooth handing over to the upcoming leadership structure.

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