

ASCENCIA declines to 52-week low

Semdex	↑	2,063.54	Sem-10	↓	373.42	Demex	↑	272.52
--------	---	----------	--------	---	--------	-------	---	--------

The **SEMDEX** remains nearly unchanged at 2,063.54 (+0.01%) with market value traded (MVT) amounting to Rs8.0m for a total volume traded (TVT) of 1.1m. **DEMEX** inches up by +0.02% to 272.52.

GRIT(USD) plummets to USD0.33 (-5.7%) on 20.9k units.

Foreign Investors (FI) are net buyers with FIS amounting to Rs0.6m compared to FIP of Rs1.3m.

ASCENCIA retreats further to hit new 52-week low of Rs18.85 (-0.3%) in today's session. Value traded for the day amounts to only Rs60k. The stock is down by -23.8% year-to-date.

International equity markets: US stocks ended Friday's session in the green territory, driven by the release of the softer-than-expected labor market data. The number of non-farm payrolls published by the Bureau of Labor Statistics, rose by 150k for the month of October, below September's figure of 297k. As per the report, the rise in the number of strikes and a slowdown in hiring contributed to the decline. Unemployment rate for the month ticked up to 3.9%, above estimates of 3.8%. The S&P 500 gained +0.9%, the Dow Jones Industrial Average (^DJ) rose by +0.7% and Nasdaq added +1.4%.

Finance: **MCBG** adds +0.2% to close at Rs329.00 on 1.5k units. **MCBG Pref** slips to Rs10.10 (-0.5%) on 10k units. **SBMH** rises to Rs4.49 (+0.2%) on 119.2k units.

Industry: **MOROIL** falls to Rs17.00 (-1.2%) on 2.2k units.

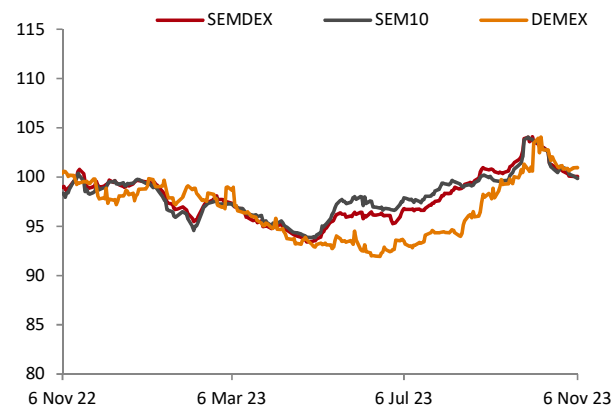
Leisure & Hotels: **ASL** down to Rs75.00 (-1.3%), **LOTO** inches up to Rs7.22 (+0.3%), **NMH** closes higher at Rs10.45 (+0.5%).

Property: **BLL** rises further to Rs0.57 (+3.6%) on only 0.3k units.

Investments: **CAUDAN** Rs0.52 (-3.7%), **CIEL** Rs6.60 (-1.5%), **ENL** Rs20.95 (-0.2%), **MDIT** Rs1.98 (+2.1%).

Sugar: **OMNICANE** jumps to Rs23.00 (+4.3%) on 2.2k units.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
OMNICANE	4.3%	CAUDAN	-3.7%
BLUELIFE	3.6%	CIEL	-1.5%
MDIT	2.1%	ASL	-1.3%
NMH.O	0.5%	MOROIL	-1.2%
LOTTO	0.3%	NEWGOLD	-0.7%
Most Active (Value)		Key Market Statistics	
ROGERS	1.7 m	Market Cap (Rs)	259.9 bn
SBM BD B2	0.9 m	Market Cap (USD)	5.9 bn
CIEL	0.9 m	Market Div Yield	4.2%
SBM BD A2	0.6 m	Market P/E	6.5x
PBL	0.6 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,063.54	0.01%	-3.4%	1.7%	
SEM-ASI	↓	1,895.97	-0.2%	-3.1%	0.6%	
SEM-VWAP	↓	1,896.27	-0.35%	-3.3%	0.6%	
SEM10	↓	373.42	-0.27%	-3.6%	0.6%	
DEMEX	↑	272.52	0.0%	-2.4%	6.9%	
Global Indices						
Japan: Nikkei 225	→	31,949.89	-	2.3%	-0.7%	
US: S&P 500	↑	4,358.34	0.9%	3.0%	-3.2%	
UK: FTSE 100	↓	7,417.73	-0.4%	-0.70%	-1.5%	
Europe: Euro Stoxx 50	↑	4,174.67	0.1%	1.9%	-3.0%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	118,160.0	2.7%	4.2%	-2.0%	
Russia: MICEX	↑	3,208.63	0.4%	2.1%	1.9%	
India: SENSEX	↑	64,363.78	0.4%	-1.8%	-1.3%	
China: Shanghai Comp	↑	3,030.80	0.7%	-2.6%	-7.6%	
South Africa: JSE All Share	↑	72,856.18	2.1%	2.9%	-5.1%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↓	84.89	-2.3%	-10.3%	USDMUR	↓	44.65	-0.1%	0.6%
Gold	↑	1,992.65	0.3%	22.3%	EURMUR	↑	48.38	0.9%	11.2%
Platinum	↑	934.75	1.0%	1.7%	GBPMUR	↑	55.78	1.3%	11.9%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	329.00	328.69	5.70	0.2 m	0.1 m	0.2%	-2.4%	2.7%
IBLL	⇒	45.00	45.00	10.00	-	-	-	-3.2%	-1.1%
SBMH	↑	4.49	4.48	3.19	0.12 m	-	0.2%	-4.1%	0.9%
AFREXIM	⇒	2.83	2.83	4.69	-	-	-	-0.7%	-4.1%
GRIT (USD)	↓	0.33	0.32	-	0.0 m	0.16 m	-5.7%	-13.2%	-5.7%
CIEL	↓	6.60	6.60	4.20	-	-	-1.5%	-7.0%	-2.7%
LUX	⇒	59.00	59.04	5.55	-	-	-	-1.7%	12.4%
ROGERS	⇒	31.50	31.50	4.95	-	-	-	-1.6%	4.5%
ASCENCIA	↓	18.85	18.85	8.65	-	-	-0.3%	-10.2%	-6.7%
PBL	⇒	537.00	537.00	12.07	-	-	-	-0.4%	0.4%
DEM Most Active (3-month average)									
ATTITUDE	⇒	10.35	10.35	13.1	-	-	-	-13.0%	-
LAVASTONE	↑	1.68	1.67	6.7	-	-	1.8%	9.1%	-1.2%
EUDCOS	⇒	14.10	14.10	9.7	-	-	-	-	0.4%

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
6-Nov-23	LAVA	The Board of Lavastone Ltd wishes to inform its shareholders and the public in general that it has, through its wholly-owned subsidiary Lavastone Properties Ltd, entered into an agreement with Sofap Properties Investment Ltd for the acquisition of a portion of land on which stands a Retail Outlet situated at Riche Terre, in the District of Pamplemousses and Warehouse Buildings, built on a portion of land situated at Coromandel in the District of Plaines Wilhems for a total consideration of MUR 156,500,000/-.
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.

MCB Stockbrokers Ltd (the "Company") issues from time to time publications on specific companies, groups or sectors. Our publications should not be construed as offers or solicitations to buy or sell securities. The information and opinions contained therein have been compiled or arrived at by the Company from sources believed to be reliable and in good faith, but no representation or warranty, express or implied, is made as to their accuracy, completeness or correctness. All our opinions and estimates constitute the Company's own judgment as at respective dates of issue and are subject to change without notice. Our publications are published for the assistance of recipients, but are not to be relied upon as authoritative or taken in substitution for the exercise of judgment by any recipient. Neither the Company, nor any of its director, officer or employee accepts any liability whatsoever for any direct or consequential loss arising from any use of our publications. Furthermore, our publications may not be reproduced, distributed or published in whole or in part for any purpose, unless prior authorization is obtained from the Company. Further, these publications are always subject to our legal notices and disclaimers found on our website: <http://www.mcbscm.mu/legal>

For trading please contact:

Telephone: (+230) 202 5850

Email: mcbsb@mcbscm.mu

MCB Stockbrokers Ltd
Sir William Newton St, Port Louis

Website: www.mcbscm.mu