

### NMH features as top gainer for the day

Semdex ↑ 2,078.18      Sem-10 ↑ 374.67      Demex ↓ 271.87

The **SEMDEX** advances by 6.83 points to close at 2,078.18 (+0.3%) with market value traded (MVT) amounting to Rs100.3m for a total volume traded (TVT) of 4.2m. **DEMEX** inches down to 271.87 (-0.01%).

**Foreign Investors (FI)** are net sellers with FIS amounting to Rs6.1m compared to FIP of Rs2.3m.

**International equity markets:** US stocks closed in the green territory, with markets digesting the release of further earnings. US Brent Crude oil fell to \$79.54/barrel, below the recent peak of \$96/barrel following the Israel-Hamas war. According to the CME FedWatch tool, markets are expecting that the Fed will not raise interest rates this year and they anticipate that rate cuts will begin in the second half of 2024. The S&P 500 inched up by +0.1%, the Dow Jones Industrial Average (^DJI) down by -0.1% and Nasdaq added +0.1%.

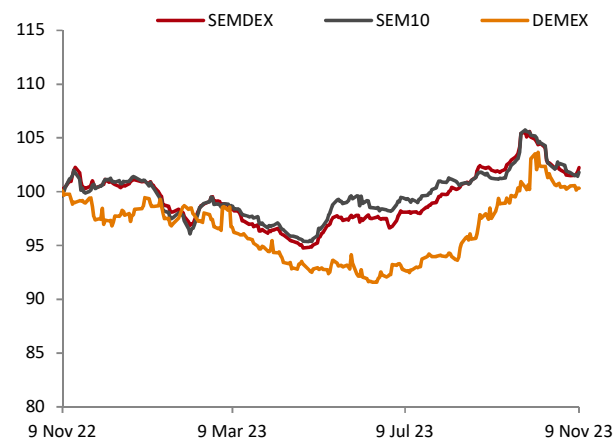
**NMH** jumps by +4.3% to record its sixth straight winning-streak at Rs12.25 on 82.3k units. The stock is gradually moving closer to the recent high of Rs12.85 and tops the year-to-date best performers' list.

Finance: **CIM** rises to Rs10.95 (+0.5%) on 2k units. **MCBG** maintains its winning streak as it closes higher at Rs335.00 (+0.9%) on 23.1k units. **SBMH** moves lower by -0.2% to close at Rs4.44 on 111.3k units.

Leisure & Hotels: **SUN** slips further to Rs37.10 (-0.8%) on 66.2k units.

Investments: **ALTEO** moves up to Rs10.35 (+0.5%), **ENL** edges lower to Rs20.50 (-1.7%), **MSE** reverses losses and rises to Rs50.75 (+0.5%), **PAD** inches down to Rs105.00 (-0.5%).

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



### Market Activity

Top gainers		Top losers	
NMH.O	4.3%	ENL	-1.7%
MCBG	0.9%	SUN	-0.8%
MEDINE	0.5%	PAD	-0.5%
ALTEO	0.5%	SBMH	-0.2%
CIM	0.5%		

Most Active (Value)		Key Market Statistics	
ENL	72.9 m	Market Cap (Rs)	261.8 bn
MCBG	7.7 m	Market Cap (USD)	5.9 bn
CMDC	4.0 m	Market Div Yield	4.2%
MSE.DI 104	4.0 m	Market P/E	6.6x
TERRA	3.8 m	FI Participation	0.0x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	<span style="color: green;">↑</span>	2,078.18	0.33%	-2.5%	2.2%	
SEM-ASI	<span style="color: green;">↑</span>	1,903.20	0.3%	-2.6%	0.7%	
SEM-VWAP	<span style="color: green;">↑</span>	1,905.70	0.30%	-2.7%	0.9%	
SEM10	<span style="color: green;">↑</span>	374.67	0.38%	-3.2%	0.5%	
DEMEX	<span style="color: red;">↓</span>	271.87	-0.0%	-3.1%	6.4%	
<b>Global Indices</b>						
Japan: Nikkei 225	<span style="color: red;">↓</span>	32,166.48	-0.3%	3.8%	-0.7%	
US: S&P 500	<span style="color: green;">↑</span>	4,382.78	0.1%	1.7%	-2.6%	
UK: FTSE 100	<span style="color: red;">↓</span>	7,401.72	-0.1%	-1.24%	-1.7%	
Europe: Euro Stoxx 50	<span style="color: green;">↑</span>	4,178.49	0.6%	0.8%	-2.6%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	<span style="color: red;">↓</span>	119,176.7	-0.1%	4.4%	0.1%	
Russia: MICEX	<span style="color: red;">↓</span>	3,245.43	-0.0%	3.2%	5.2%	
India: SENSEX	<span style="color: green;">↑</span>	64,975.61	0.1%	-1.5%	-1.3%	
China: Shanghai Comp	<span style="color: red;">↓</span>	3,052.37	-0.2%	-1.9%	-6.4%	
South Africa: JSE All Share	<span style="color: green;">↑</span>	72,465.63	1.2%	1.1%	-5.7%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	79.54	-2.5%	-16.6%	USDMUR	⇒	44.65	-	0.9%
Gold	↓	1,950.20	-1.0%	13.9%	EURMUR	↑	48.27	0.2%	8.1%
Platinum	↓	871.53	-2.6%	-13.0%	GBPMUR	↑	55.36	0.1%	8.2%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-I 0</b>									
MCBG	↑	335.00	334.97	5.81	-	2.0 m	0.9%	-	3.9%
IBLL	⇒	45.00	45.00	10.00	-	-	-	-3.2%	-0.9%
SBMH	↓	4.44	4.44	3.15	-	-	-0.2%	-3.5%	-1.8%
AFREXIM	⇒	2.83	2.83	4.69	-	-	-	-2.4%	2.9%
GRIT (USD)	⇒	0.30	0.30	-	-	0.09 m	-	-23.1%	-14.3%
CIEL	⇒	6.60	6.60	4.20	-	-	-	-8.3%	-2.7%
LUX	⇒	59.00	59.00	5.55	-	-	-	-1.7%	12.4%
ROGERS	⇒	31.50	31.50	4.95	-	-	-	-1.6%	4.5%
ASCENCIA	⇒	18.70	18.70	8.58	-	-	-	-9.0%	-8.8%
PBL	⇒	537.00	537.00	12.07	-	-	-	-0.2%	0.4%
<b>DEM Most Active (3-month average)</b>									
LFL.O	⇒	17.75	17.75	7.9	2.67 m	-	-	-8.0%	-
EUDCOS	↑	14.30	14.22	9.9	-	-	0.7%	1.4%	1.8%
MIWA	⇒	0.36	0.35	9.0	-	-	-	-7.7%	20.0%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
9-Nov-23	ASCENCIA	Official	Dividend	Interim	0.42	23-Nov-23	14-Dec-23
8-Nov-23	INNODIS	Official	Dividend	Interim	0.50	14-Feb-24	16-Feb-24
28-Sep-23	MCBG	Official	Dividend	Final	11.75	22-Nov-23	22-Dec-23
28-Sep-23	MCBG PREF	Official	Dividend	Final	0.24	29-Nov-23	29-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
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.

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