

The SEMDEX snaps winning streak

Semdex	↓	2,083.47	Sem-10	↑	378.16	Demex	↑	271.90
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The **SEMDEX** snaps its five-day winning streak as it inches down by 0.87 points to close today's session at 2,083.47 (-0.04%) with market value traded (MVT) amounting to Rs13.5m for a total volume traded (TVT) of 0.3m. The SEMDEX gained 1.0% week-over-week and is currently up by +1.4% year-to-date. The **DEMEX** remains flat at 271.90.

Rs1.3m compared to FIP of Rs3.1m.

International equity markets: US stocks finished higher on Friday's session post the pullback from bond yields triggered by Fed Powell's hawkish speech at the IMF last Thursday. He restated that the US economy is resilient to interest rate hikes and left the door open for further policy tightening. All eyes will be fixated on the US Consumer Price Index (CPI) which is expected to fall to 3.3% year-over-year for the month of October (vs 3.7% y/y in September). The S&P 500 climbed by +1.6%, the Dow Jones Industrial Average (^DJI) rose by 1.1% and Nasdaq jumped by +2.0%.

Finance: **MCBG** closes flat at Rs338.00, with total value traded accounting for 31.0% of MVT for the day. **SBMH** rises to Rs4.47 (+0.7%) on only 0.4k units.

Leisure: **NMH** reverses gains and slips to Rs11.50 (-2.5%), **NMH Pref** adds +2.3% to close at Rs11.25 on 0.8k units.

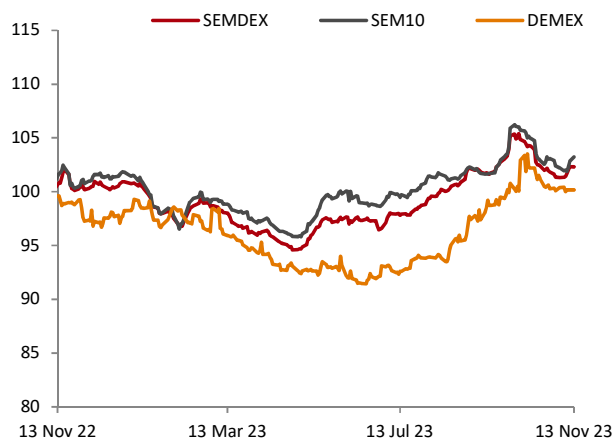
Property: **BLL** closes higher at Rs0.57 (+5.6%) on 6.1k units.

Investments: **ENL** slips to Rs20.40 (-0.5%), **PAD** closes lower at Rs103.75 (-1.2%) on 5.8k units, **TERRA** tumbles to Rs22.50 (-0.4%) on 5.1k units.

GRIT (USD) jumps by +10.0% to close at USD0.33 on 3k units.

Foreign Investors (FI) are net buyers with FIS amounting to

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
GRIT (USD)	10.0%	NEWGOLD	-2.7%
BLUELIFE	5.6%	NMH.O	-2.5%
NMH.P	2.3%	PAD	-1.2%
SBMH	0.7%	ENL	-0.5%
SUN	0.5%	TERRA	-0.4%
Most Active (Value)		Key Market Statistics	
MCBG	4.2 m	Market Cap (Rs)	262.4 bn
ENL	1.3 m	Market Cap (USD)	5.9 bn
NEWGOLD	1.2 m	Market Div Yield	4.2%
IBLL.D0146	1.1 m	Market P/E	6.6x
MEDINE	1.0 m	FI Participation	0.2x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,083.47	-0.04%	-1.9%	2.1%	
SEM-ASI	↑	1,911.09	0.2%	-2.0%	1.1%	
SEM-VWAP	↑	1,913.98	0.05%	-1.9%	1.3%	
SEM10	↑	378.16	0.39%	-1.7%	1.6%	
DEMEX	↑	271.90	0.0%	-2.0%	6.8%	
Global Indices						
Japan: Nikkei 225	↓	32,568.11	-0.2%	2.6%	0.3%	
US: S&P 500	↑	4,415.24	1.6%	1.3%	-1.2%	
UK: FTSE 100	↓	7,360.55	-1.3%	-3.51%	-3.4%	
Europe: Euro Stoxx 50	↓	4,197.36	-0.8%	-0.2%	-4.3%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	120,568.1	1.3%	3.3%	1.9%	
Russia: MICEX	↑	3,242.06	0.1%	2.0%	3.0%	
India: SENSEX	↑	64,904.68	0.1%	-1.8%	-1.2%	
China: Shanghai Comp	↓	3,038.97	-0.5%	-1.2%	-6.6%	
South Africa: JSE All Share	↓	71,393.30	-1.2%	-3.3%	-8.2%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	81.43	1.8%	-13.1%	USDMUR	→	44.66	-	0.9%
Gold	↓	1,940.20	-0.9%	10.7%	EURMUR	↑	48.17	0.2%	6.7%
Platinum	↓	845.83	-1.9%	-18.2%	GBPMUR	↑	55.13	0.1%	6.6%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	→	338.00	338.00	5.86	-	-	-	1.8%	4.8%
IBLL	→	45.00	45.00	10.00	-	-	-	-3.0%	0.4%
SBMH	↑	4.47	4.45	3.17	-	-	0.7%	-2.8%	-0.9%
AFREXIM	→	2.83	2.83	4.69	-	-	-	-	2.9%
GRIT (USD)	↑	0.33	0.33	-	-	0.04 m	10.0%	-15.4%	-5.7%
CIEL	→	6.70	6.70	4.27	0.53 m	-	-	-7.5%	0.9%
LUX	→	58.50	58.50	5.50	-	-	-	-2.5%	4.5%
ROGERS	→	31.50	31.50	4.95	-	-	-	-1.7%	4.5%
ASCENCIA	→	19.00	19.00	8.72	-	-	-	-7.3%	-7.3%
PBL	→	537.00	537.00	12.07	-	-	-	-	0.4%
DEM Most Active (3-month average)									
MIWA	→	0.36	0.35	9.0	-	0.6 m	-	-10.0%	-
LAVASTONE	→	1.60	1.60	6.4	0.028 m	-	-	3.2%	-11.1%
PHIN	→	314.25	314.25	8.0	-	-	-	3.4%	4.3%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
13-Nov-23	IBL	Official	Dividend	Interim	0.18	27-Nov-23	15-Dec-23
13-Nov-23	ROGERS	Official	Dividend	Interim	0.47	28-Nov-23	15-Dec-23
13-Nov-23	VIVO	Official	Dividend	Interim	4.20	27-Nov-23	15-Dec-23
10-Nov-23	PBL	Official	Dividend	Interim	5.40	27-Nov-23	18-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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