

The SEMDEX ends the week lower

Semdex	↓	2,085.34	Sem-10	↓	377.36	Demex	↑	272.10
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The **SEMDEX** extends its losing streak, ending the week lower at 2,085.34 (-0.1%) with market value traded (MVT) amounting to Rs22.1m for a total volume traded (TVT) of 0.2m. The **DEMEX** closes flat at 272.10 (+0.02%).

Finance: **MCBG** falls further to Rs336.00 (-0.3%) on 48.2k units and accounts for 73.2% of MVT for the day. **SBMH** declines by -0.2% to close at Rs4.53.

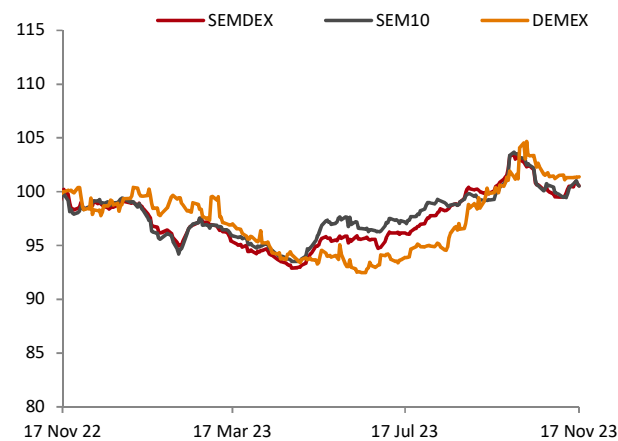
Leisure & Hotels: **ASL** tumbles to Rs69.00 (-1.4%) on 2.5k units. **NMH** closes lower at Rs10.80 (-1.8%) on 21.4k units.

Investments: **ALTEO** rises to Rs10.45 (+1.0%), **FINCORP** retreats to Rs17.50 (-2.5%), **PAD** Rs104.00 (+0.2%), **POLICY** adds +4.9% to close at Rs3.20 on 1.0k units.

GRIT (MUR) drops to Rs14.00 (-13.9%) on only 0.1k units.

Foreign Investors (FI) remain net sellers with FIS amounting to Rs3.0m compared to FIP of Rs1.8m.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
POLICY	4.9%	GRIT (MUR)	-13.8%
ALTEO	1.0%	FINCORP	-2.5%
PAD	0.2%	NMH.O	-1.8%
		ASL	-1.4%
		MCBG	-0.3%
Most Active (Value)		Key Market Statistics	
MCBG	16.2 m	Market Cap (Rs)	262.7 bn
MEDINE	2.4 m	Market Cap (USD)	5.9 bn
PIM	0.5 m	Market Div Yield	4.2%
PBL	0.5 m	Market P/E	6.6x
SBMH BondA	0.5 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,085.34	-0.14%	-0.3%	2.1%	
SEM-ASI	↓	1,908.56	-0.1%	-1.0%	0.8%	
SEM-VWAP	↓	1,912.08	-0.10%	-1.2%	1.0%	
SEM10	↓	377.36	-0.15%	-0.5%	1.9%	
DEMEX	↑	272.10	0.0%	-1.4%	5.9%	
Global Indices						
Japan: Nikkei 225	↓	33,424.41	-0.3%	5.6%	5.2%	
US: S&P 500	↑	4,508.24	0.1%	3.1%	2.4%	
UK: FTSE 100	↓	7,410.97	-1.0%	-2.88%	0.7%	
Europe: Euro Stoxx 50	↓	4,302.45	-0.3%	3.7%	0.4%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	124,639.2	1.2%	7.0%	7.8%	
Russia: MICEX	↓	3,189.08	-0.8%	-1.4%	4.6%	
India: SENSEX	↑	65,982.48	0.5%	-0.3%	0.7%	
China: Shanghai Comp	↓	3,050.93	-0.7%	-0.7%	-3.1%	
South Africa: JSE All Share	↓	73,736.61	-1.4%	0.8%	-1.6%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	77.42	-4.6%	-16.6%	USDMUR	⇒	44.60	-	1.0%
Gold	↑	1,980.90	1.1%	11.7%	EURMUR	↑	48.85	0.2%	6.4%
Platinum	↓	897.48	-0.2%	-10.8%	GBPMUR	↑	55.85	0.2%	6.2%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-I10									
MCBG	↓	336.00	336.29	5.83	0.2 m	2.8 m	-0.3%	3.5%	3.7%
IBLL	⇒	45.00	45.00	10.00	-	-	-	-	1.1%
SBMH	↓	4.53	4.53	3.22	-	-	-0.2%	-0.4%	0.4%
AFREXIM	⇒	2.85	2.85	4.72	-	0.20 m	-	0.7%	7.5%
GRIT (USD)	⇒	0.30	0.30	-	-	-	-	-25.0%	-18.9%
CIEL	⇒	6.98	6.98	4.45	-	-	-	-3.1%	5.8%
LUX	⇒	58.00	58.00	5.46	-	0.0 m	-	-3.3%	3.6%
ROGERS	⇒	32.00	32.00	5.03	-	-	-	-2.4%	6.0%
ASCENCIA	⇒	19.00	19.00	8.72	-	-	-	-1.0%	-7.3%
PBL	⇒	537.00	537.00	12.07	-	-	-	-	-
DEM Most Active (3-month average)									
SEMARIS	⇒	0.75	0.75	0.0	0.05 m	-	-	-5.1%	-
SCT	↓	3.90	3.79	13.0	-	-	-2.5%	5.4%	115.5%
ATTITUDE	↑	10.45	10.45	13.2	-	-	0.5%	-12.2%	-8.7%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
15-Nov-23	MUA	Official	Dividend	Final	2.10	29-Nov-23	20-Dec-23
15-Nov-23	TERRA	Official	Dividend	Final	1.05	30-Nov-23	15-Dec-23
14-Nov-23	ENL	Official	Dividend	Interim	0.55	29-Nov-23	29-Dec-23
14-Nov-23	MOROIL	Official	Dividend	Interim	0.50	29-Nov-23	22-Dec-23

Latest Announcements

Date	Company	Details
14-Nov-23	MCBG	Further to the Communiqué dated 24th May, 2023, the Boards of Directors of The Mauritius Commercial Bank Limited and MCB Group Limited hereby inform the public in general that Mr Alain Law Min, will be retiring from his position as Chief Executive Officer of MCB on 31st December, 2023. The Boards of Directors of MCB and MCBG have also confirmed Mr Thierry Hebraud, currently Chief Executive Officer Designate of MCB Ltd as Chief Executive Officer, effective 1st January, 2024.
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 MUR156,500,000/-.

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