

ENL closes ex-dividend at Rs20.20

Semdex ↓ 2,061.72 **Sem-10** ↓ 371.68 **Demex** ↓ 266.45

The **SEMDEX** inches lower by 1.14 points to close at 2,061.72 (-0.1%) with market value traded (MVT) amounting to Rs27.8m for a total volume traded (TVT) of 1.3m. The **DEMEX** declines by -0.6% to 266.45.

Property: **ASCENCIA** declines further to Rs18.50 (-1.6%) on 66.2k units.

Sugar: **OMNICANE** slips to Rs22.90 (-0.4%) on 3.8k units.

ENL closes ex-dividend at Rs20.20 (+1.0%) on 104.3k units. The stock is currently down by -15.7% year-to-date.

GRIT (USD) adds +3.6% to close at USD0.29 on 29.6k units.

Finance: **MCBG (Pref)** trades ex-dividend at Rs10.05 (-0.5%), **SBMH** slips by -0.2% to close at Rs4.59 on 360.6k units.

Commerce: **H.MALLAC** jumps by +7.0% to close at Rs28.90 on 1k units, **INNODIS** edges lower to Rs35.20 (-0.1%) on 8.3k units.

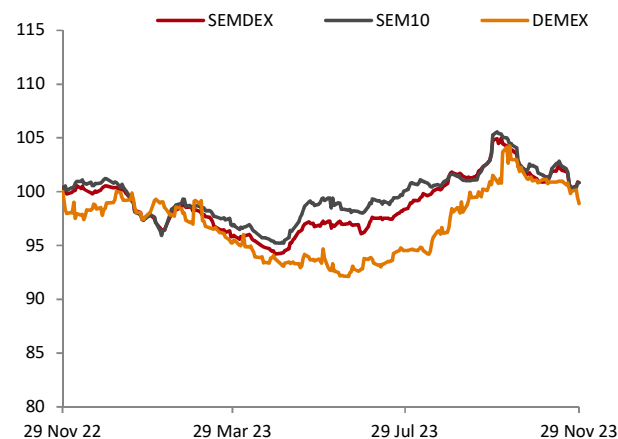
Industry: **MCFI** down to Rs7.30 (-2.7%), **MOROIL** closes lower at Rs17.25 (-2.8%).

International equity markets: The three main US indices closed higher with investors assessing the speeches from Fed Governor Michelle Bowman and Fed Governor Christopher Waller. Bowman indicated that the Fed must raise rates further to bring inflation down to the target level of 2%, while Waller is confident that interest rates are at the right level. The S&P 500 was up by +0.1%, the Dow Jones Industrial Average (^DJI) rose by +0.2% and Nasdaq added +0.3%. In today's session, investors will be watching out for the release of the US preliminary GDP quarter-over-quarter data.

Investments: **ALTEO** Rs10.40 (+4.0%), **CAUDAN** Rs0.51 (-3.8%), **FINCORP** Rs16.10 (-0.3%), **MSE** Rs50.75 (-0.5%), **NIT** Rs17.40 (-0.6%), **ROGERS** Rs31.40 (-0.5%), **UTDL** Rs55.50 (+0.9%).

Leisure & Hotels: **LOTO** inches down to Rs7.20 (-0.3%), **NMH** retreats to Rs10.45 (-1.0%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
H MALLAC	7.0%	CAUDAN	-3.8%
ALTEO	4.0%	MOROIL	-2.8%
GRIT (USD)	3.6%	MCFI	-2.7%
ADBF	1.4%	ASCENCIA	-1.6%
ENL	1.0%	NMH.O	-0.9%

Most Active (Value)		Key Market Statistics	
MCBG	10.0 m	Market Cap (Rs)	259.7 bn
AFREXIM	5.1 m	Market Cap (USD)	5.9 bn
ENL	2.1 m	Market Div Yield	4.2%
NIT	1.9 m	Market P/E	6.5x
SBMH	1.7 m	FI Participation	0.1x

Summary Market Data		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,061.72	-0.06%	-0.6%	-0.5%	
SEM-ASI	↑	1,889.21	0.0%	-1.3%	-1.4%	
SEM-VWAP	↑	1,888.80	0.15%	-1.5%	-1.4%	
SEM10	↓	371.68	-0.01%	-1.6%	-0.6%	
DEMEX	↓	266.45	-0.5%	-2.1%	2.3%	
Global Indices						
Japan: Nikkei 225	↓	33,408.39	-0.1%	7.8%	3.8%	
US: S&P 500	↑	4,554.89	0.1%	10.6%	2.7%	
UK: FTSE 100	↓	7,455.24	-0.1%	2.25%	1.6%	
Europe: Euro Stoxx 50	↓	4,348.02	-0.1%	8.3%	1.3%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	126,538.3	0.7%	11.7%	8.0%	
Russia: MICEX	↑	3,196.36	0.2%	-0.9%	-0.1%	
India: SENSEX	↑	66,174.20	0.3%	3.7%	1.8%	
China: Shanghai Comp	↑	3,038.55	0.2%	0.7%	-1.9%	
South Africa: JSE All Share	↑	75,589.18	0.3%	8.8%	0.7%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	81.68	-1.0%	-2.6%	USDMUR	↓	44.55	-0.1%	1.0%
Gold	↑	2,040.97	1.3%	17.2%	EURMUR	↑	49.45	0.3%	7.8%
Platinum	↑	944.54	0.5%	-5.3%	GBPMUR	↑	57.14	0.5%	7.7%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-I10									
MCBG	⇒	330.00	330.00	5.72	-	0.0 m	-	0.8%	1.9%
IBLL	⇒	44.95	44.95	9.99	-	-	-	-0.1%	0.8%
SBMH	↓	4.59	4.59	3.26	-	-	-0.2%	1.1%	2.0%
AFREXIM	⇒	2.85	2.85	4.72	-	3.71 m	-	0.7%	-
GRIT (USD)	↑	0.29	0.27	-	-	0.01 m	3.6%	-27.5%	-25.6%
CIEL	⇒	6.70	6.70	4.27	-	-	-	-	-5.6%
LUX	⇒	56.00	56.00	5.27	-	-	-	-1.8%	-
ROGERS	↓	31.40	31.40	4.96	-	-	-0.5%	-1.9%	4.0%
ASCENCIA	↓	18.50	18.50	8.49	-	-	-1.6%	-2.1%	-11.1%
PBL	⇒	530.00	530.00	11.91	-	-	-	-1.3%	-1.5%
DEM Most Active (3-month average)									
MIWA	↑	0.36	0.35	9.0	-	-	9.1%	-	-
SCT	⇒	3.60	3.68	12.0	-	-	-	-1.4%	44.0%
LAVASTONE	↓	1.54	1.54	6.2	-	-	-0.6%	-6.1%	-6.1%

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
28-Nov-23	CTIL	The Board of Directors of Cavell Touristic Investments Ltd is pleased to announce that on 27 November 2023, the Listing Executive Committee of the Stock Exchange of Mauritius Limited granted its approval for the admission of 11,259,388 no par value ordinary shares of CTIL on the Development & Enterprise Market of the SEM by way of an introduction.
23-Nov-23	SBMH	SBM Holdings Ltd (SBMH), the ultimate Holding company of SBM Bank (Mauritius) Ltd (SBMBM or the Bank), wishes to inform its shareholders and the public in general that Mr Premchand Mungar has been appointed as the Chief Executive Officer (CEO) of SBMBM effective 22 November 2023.

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