

MCBG accounts for 64.4% of market value traded for the day

Semdex ↑ 2,138.74 Sem-10 ↓ 388.47 Demex ↑ 272.71

The **SEMDEX** reverses yesterday's losses, inching up by 2.38 points to end at 2,138.74 (+0.1%) with market value traded (MVT) amounting to Rs66.6m for a total volume traded (TVT) of 0.7m.

MCBG closes flat at Rs337.00 on 127.7k units. Value traded for the day amounts to Rs42.9m, accounting for 64.4% of MVT. FIP stands at Rs31.4m, compared to FIS of Rs0.3m. The stock is currently trading at a P/E of 5.84x, and it is up by +10.1% year-to-date.

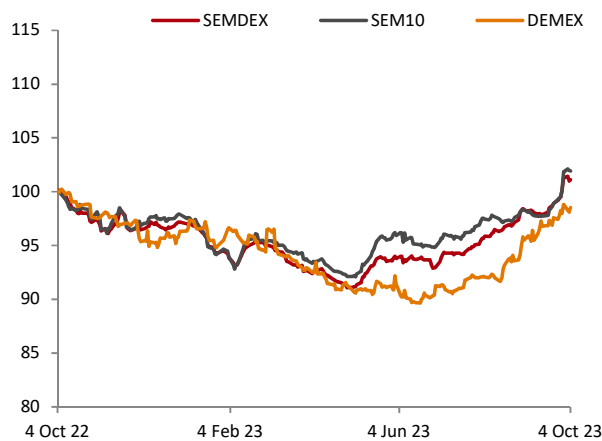
Finance: **MUA** gains +0.3%, closing slightly higher at Rs99.75 on 5.6k units.

Commerce: **HAREL** rises to Rs27.00 (+3.1%), **INNODIS** moves up to Rs37.00 (+2.8%) and **IBL** closes slightly higher at Rs46.25 (+0.5%).

Leisure & Hotels: **NMH** slips further to Rs11.70 (-5.3%) on 15.3k units, **LUX** sheds -1.6%, closing lower at Rs60.00, **SUN** jumps by +5.8% to Rs41.00 on 45.9k units.

Investments: **ALTEO** edges higher to Rs10.90 (+3.8%), **NIT** slips to Rs19.45 (-0.3%).

Market Indices: 1 year Trend (Rebased 100)



AEIB drops to USD2.85 (-1.0%) on 106.7k units.

Foreign Investors (FI) are net buyers with FIP amounting to Rs31.5m compared to FIS of Rs14.3m.

International equity markets: US stocks finished yesterday's session in the red territory post the release of the Job Openings and Labour Turnover Survey (JOLTS) published by the Bureau of Labour Statistics. After three months of straight declines, the number of job openings rose to 9.6m in August. This data demonstrates that the labour market in the US is still tight. Another crucial data providing more visibility on the labour market is the unemployment rate, which will be released on Friday. The S&P 500 fell by -1.4%, the Dow Jones Industrial Average (^DJI) down by -1.3% and Nasdaq tumbled by -2.0%.

Market Activity

Top gainers		Top losers	
SUN	5.8%	NMH.O	-5.3%
ALTEO	3.8%	LUX	-1.6%
H MALLAC	3.1%	AFREXIM	-1.0%
INNODIS	2.8%	NIT	-0.3%
IBLL	0.5%		

Most Active (Value)		Key Market Statistics	
MCBG	42.9 m	Market Cap (Rs)	269.4 bn
AFREXIM	13.6 m	Market Cap (USD)	6.0 bn
SBM BD A2	2.0 m	Market Div Yield	4.1%
SUN	1.8 m	Market P/E	7.1x
LUX	1.2 m	FI Participation	0.3x

Summary Market Data

	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius					
SEMDEX	2,138.74	0.11%	3.0%	7.7%	
SEM-ASI	1,963.20	0.1%	1.9%	5.8%	
SEM-VWAP	1,962.68	-0.28%	1.8%	5.8%	
SEM10	388.47	-0.03%	3.9%	6.5%	
DEMEX	272.71	0.4%	2.7%	7.9%	
Global Indices					
Japan: Nikkei 225	31,237.94	-1.6%	-4.5%	-7.5%	
US: S&P 500	4,229.45	-1.4%	-6.3%	-5.1%	
UK: FTSE 100	7,470.16	-0.5%	0.08%	-0.8%	
Europe: Euro Stoxx 50	4,095.59	-1.0%	-4.4%	-6.9%	
Emerging Market Indices					
Brazil: IBOVESPA	113,419.0	-1.4%	-3.8%	-5.2%	
Russia: MICEX	3,143.88	0.4%	-2.7%	12.5%	
India: SENSEX	65,512.10	-0.5%	0.2%	0.5%	
China: Shanghai Comp	3,110.48	-	-0.7%	-4.1%	
South Africa: JSE All Share	70,773.21	-0.7%	-5.4%	-7.2%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	90.92	0.2%	2.3%	USDMUR	44.70	-0.7%	0.3%
Gold	↓	1,823.02	-0.3%	7.2%	EURMUR	47.23	-0.6%	7.8%
Platinum	↓	871.79	-1.1%	-3.7%	GBPMUR	54.46	-0.7%	8.1%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	⇒	337.00	335.62	5.84	31.4 m	0.3 m	-	4.0%	6.6%
IBLL	↑	46.25	46.03	10.28	-	-	0.5%	3.7%	3.0%
SBMH	⇒	4.70	4.70	3.34	-	-	-	4.4%	3.5%
AFREXIM	↓	2.85	2.85	4.72	-	13.56 m	-1.0%	1.8%	7.5%
GRIT (USD)	⇒	0.39	0.39	14.89	-	-	-	-2.5%	5.4%
CIEL	⇒	7.10	7.10	4.52	0.00 m	-	-	1.4%	2.9%
LUX	↓	60.00	60.00	5.64	-	-	-1.6%	-3.2%	11.1%
ROGERS	⇒	32.00	31.92	8.36	-	-	-	3.2%	7.7%
ASCENCIA	⇒	21.70	21.70	9.95	-	-	-	4.8%	9.0%
PBL	⇒	539.00	539.00	12.11	-	-	-	0.2%	1.7%
DEM Most Active (3-month average)									
LAVASTONE	⇒	1.55	1.58	6.2	-	0.1 m	-	-3.1%	-
EUDCOS	⇒	14.10	14.10	9.7	-	-	-	-6.0%	-9.0%
LMLC.O	↑	105.00	104.86	6.0	0.07 m	-	1.7%	5.0%	2.9%

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
3-Oct-23	ENL	The Board of Directors of ENL Limited wishes to inform its shareholders and the public at large that there will be a delay in the publication of the abridged audited financial statements for the year ended 30 June 2023 by ENL which is due to the delay in the finalisation of the accounts of an associated company. ENL has obtained formal approval from the Stock Exchange of Mauritius for an extension for publication and expects to publish the said financial statements by 13 October 2023
3-Oct-23	ROGERS	The Board of Rogers wishes to inform its shareholders and the public in general that the Company has applied for and obtained from the Stock Exchange of Mauritius Ltd. an extension to publish its abridged audited financial statements for the year ended 30 June 2023 by 13 October 2023.

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