

NMH features as top gainer for the day

Semdex	↑	2,146.44	Sem-10	↓	388.38	Demex	↓	271.60
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The **SEMDEX** extends its gains, rising further by 7.70 points to end at 2,146.44 (+0.4%) with market value traded (MVT) amounting to Rs20.9m for a total volume traded (TVT) of 0.8m.

NMH snaps its three-day losing streak, surging by +9.8% to close at Rs12.85 on 69.8k units. Total value traded for the day amounts to Rs0.9m. **NMH Pref** adds +1.8%, moving slightly higher to Rs11.50.

Finance: **MCBG** rises to Rs337.25 (+0.1%) on 20.3k units, **SBMH** inches up to Rs4.73 (+0.6%) on 435k units.

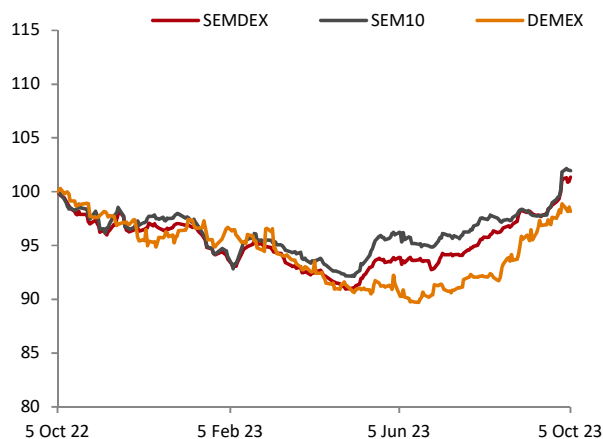
Industry: **MOROIL** slips to Rs17.30 (-1.1%) on 6.2k units, **INNODIS** down to Rs35.10 (-5.1%) and **IBL** rises further to Rs46.50 (+0.5%).

Leisure & Hotels: **ASL** inches up to Rs71.00 (+1.1%).

Investments: **ALTEO** down to Rs10.50 (-3.7%), **CAUDAN** moves slightly up to Rs0.56 (+1.8%), **FINCORP** Rs17.45 (+2.7%), **POLICY** Rs3.05 (+1.7%), **TERRA** Rs23.50 (+2.2%), **UTDL** Rs56.00 (+1.8%).

GRIT (USD) tumbles to USD0.38 (-2.6%) on 9.8k units.

Market Indices: 1 year Trend (Rebased 100)



Foreign Investors (FI) are net sellers with FIP amounting to Rs2.3m compared to FIS of Rs2.4m.

International equity markets: US stocks reversed losses and closed higher in yesterday's session, following a drop in yield to 4.735% on the 10-year US Treasury which hit a 16-year high in Tuesday's session. On a separate note, the US ISM Services Purchasing Manager's Index (PMI) came at 53.6 for the month of September, in line with market expectations. The figure shows that the services sector has expanded for the ninth consecutive month. The S&P 500 rose by +0.8%, the Dow Jones Industrial Average (^DJI) up by +0.4% and Nasdaq added +1.3%.

Market Activity

Top gainers		Top losers	
NMH.O	9.8%	INNODIS	-5.1%
FINCORP	2.6%	ALTEO	-3.7%
TERRA	2.2%	GRIT (USD)	-2.6%
CAUDAN	1.8%	MOROIL	-1.1%
UTDL	1.8%		

Most Active (Value)		Key Market Statistics	
MCBG	6.8 m	Market Cap (Rs)	270.3 bn
CMDC	4.4 m	Market Cap (USD)	6.1 bn
SBMH	2.1 m	Market Div Yield	4.1%
AFREXIM	1.9 m	Market P/E	7.1x
LUX	1.4 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,146.44	0.36%	3.3%	7.8%	
SEM-ASI	↑	1,964.31	0.1%	1.9%	5.6%	
SEM-VWAP	↑	1,964.25	0.08%	1.8%	5.6%	
SEM10	↓	388.38	-0.02%	3.8%	6.5%	
DEMEX	↓	271.60	-0.4%	2.5%	7.4%	
Global Indices						
Japan: Nikkei 225	↓	30,526.88	-2.3%	-7.3%	-8.7%	
US: S&P 500	↑	4,263.75	0.8%	-5.6%	-4.3%	
UK: FTSE 100	↓	7,412.45	-0.8%	-0.54%	-1.4%	
Europe: Euro Stoxx 50	↑	4,099.85	0.1%	-4.2%	-6.6%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	113,607.5	0.2%	-3.5%	-4.6%	
Russia: MICEX	↓	3,134.25	-0.3%	-4.1%	11.6%	
India: SENSEX	↓	65,226.04	-0.4%	-0.6%	-0.4%	
China: Shanghai Comp	→	3,110.48	-	-2.1%	-4.2%	
South Africa: JSE All Share	↓	70,564.69	-0.3%	-6.4%	-7.4%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↓	85.81	-5.6%	-6.5%	USDMUR	⇒	44.70	-	0.3%
Gold	↓	1,821.36	-0.1%	5.5%	EURMUR	↑	47.48	0.5%	6.9%
Platinum	↓	869.78	-0.2%	-6.5%	GBPMUR	↑	54.86	0.7%	7.7%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↑	337.25	337.46	5.85	-	0.3 m	0.1%	4.1%	6.7%
IBLL	↑	46.50	46.28	10.33	-	-	0.5%	4.5%	3.6%
SBMH	↑	4.73	4.73	3.36	0.02 m	-	0.6%	5.1%	5.1%
AFREXIM	⇒	2.85	2.85	4.72	-	1.89 m	-	1.8%	7.5%
GRIT (USD)	↓	0.38	0.39	14.50	-	0.13 m	-2.6%	-5.0%	8.6%
CIEL	⇒	7.10	7.10	4.52	-	-	-	1.4%	2.9%
LUX	⇒	60.00	60.00	5.64	0.150 m	-	-	-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)									
MIWA	↓	0.35	0.35	8.8	0.45 m	-	-2.8%	16.7%	-
LAVASTONE	↓	1.54	1.55	6.2	0.010 m	-	-0.6%	-6.7%	-3.8%
LFL.O	⇒	19.80	19.80	9.1	-	-	-	-3.4%	-4.1%

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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