

Only one gainer for the day

Semdex	↓	2,135.78	Sem-10	↓	387.27	Demex	↑	279.36
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The **SEMDEX** reverses yesterday's gains, slipping by 10.67 points to end this week's session at 2,135.78 (-0.5%) with market value traded (MVT) amounting to Rs34.5m for a total volume traded (TVT) of 0.9m.

All stocks in the official market end in the red territory except for **MUA** which inches slightly up by +0.3% to close at Rs100.00, albeit on only 2.4k units. The top loser was **CAUDAN**, shedding 8.9% day-on-day to close at Rs0.51 on 78.6k units.

Finance: **MCBG** slips to Rs337.00 (-0.1%), **MCBG Pref** inches down to Rs10.15 (-0.5%), **SBMH** down to Rs4.68 (-1.1%).

Commerce: **SHEL** Rs318.00 (-3.6%).

Leisure & Hotels: **NMH Pref** moves lower to Rs11.30 (-1.7%), **SUN** down to Rs40.00 (-2.4%).

Property: **ASCENCIA** retreats to Rs21.00 (-3.2%).

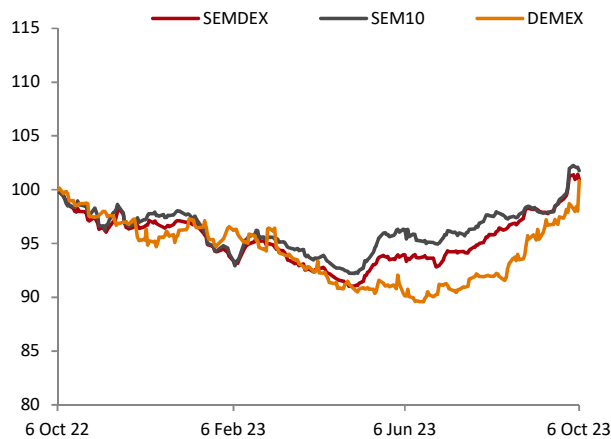
Sugar: **OMNICANE** falls to Rs22.00 (-2.2%).

Investments: **FINCORP** Rs17.05 (-2.3%), **NIT** Rs19.00 (-2.3%), **POLICY** Rs3.00 (-1.6%), **TERRA** Rs23.25 (-1.1%).

Foreign Investors (FI) are net buyers with FIP amounting to Rs6.6m compared to FIS of Rs0.8m.

International equity markets: US stocks shed some of yesterday's gains with investors waiting for the release of the US unemployment rate, which is expected to be around 3.8% for the month of September. The unemployment claims for the week came at 207k, hovering near lowest levels of unemployment claims this year. The S&P 500 inched lower by -0.1% the Dow Jones Industrial Average (^DJI) closed flat and Nasdaq down by -0.1%.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
MUA	0.3%	CAUDAN	-8.9%
		VIVO	-3.6%
		ASCENCIA	-3.2%
		SUN	-2.4%
		NIT	-2.3%
Most Active (Value)		Key Market Statistics	
MCBG	15.0 m	Market Cap (Rs)	269.0 bn
VIVO	8.3 m	Market Cap (USD)	6.1 bn
LUX	3.6 m	Market Div Yield	4.1%
SUN	1.1 m	Market P/E	7.0x
CIM	0.9 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,135.78	-0.50%	2.7%	7.0%	
SEM-ASI	↓	1,956.35	-0.4%	1.8%	5.0%	
SEM-VWAP	↓	1,960.96	-0.17%	2.1%	5.3%	
SEM10	↓	387.27	-0.29%	3.7%	5.8%	
DEMEX	↑	279.36	2.9%	5.8%	10.7%	
Global Indices						
Japan: Nikkei 225	↑	31,075.36	1.8%	-5.9%	-6.8%	
US: S&P 500	↓	4,258.19	-0.1%	-5.3%	-4.2%	
UK: FTSE 100	↑	7,451.54	0.5%	0.18%	0.1%	
Europe: Euro Stoxx 50	↓	4,099.81	-0.0%	-4.0%	-5.8%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	113,284.1	-0.3%	-3.4%	-5.2%	
Russia: MICEX	↓	3,131.76	-0.1%	-4.1%	11.6%	
India: SENSEX	↑	65,631.57	0.6%	-0.2%	0.3%	
China: Shanghai Comp	→	3,110.48	-	-1.4%	-3.5%	
South Africa: JSE All Share	↑	71,249.59	1.0%	-5.0%	-6.1%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	84.07	-2.0%	-10.0%	USDMUR	44.65	-0.1%	0.2%
Gold	↓	1,820.30	-0.1%	6.1%	EURMUR	47.50	0.0%	7.5%
Platinum	↓	864.01	-0.7%	-5.9%	GBPMUR	54.88	0.0%	8.4%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	337.00	337.05	5.84	6.4 m	0.1 m	-0.1%	4.3%	6.6%
IBLL	→	46.50	46.50	10.33	-	-	-	4.5%	3.6%
SBMH	↓	4.68	4.68	3.32	-	-	-1.1%	5.2%	4.0%
AFREXIM	→	2.85	2.85	4.72	-	0.08 m	-	1.8%	7.5%
GRIT (USD)	→	0.38	0.39	14.50	-	-	-	8.6%	8.6%
CIEL	→	7.10	7.10	4.52	-	-	-	2.0%	2.9%
LUX	→	60.00	60.00	5.64	-	0.0 m	-	-3.2%	11.1%
ROGERS	→	32.00	31.92	8.36	-	-	-	3.2%	7.7%
ASCENCIA	↓	21.00	21.41	9.63	-	-	-3.2%	1.4%	5.5%
PBL	→	539.00	539.00	12.11	0.0 m	-	-	0.2%	1.7%
DEM Most Active (3-month average)									
LAVASTONE	↓	1.53	1.54	6.1	-	-	-0.6%	-4.4%	-
LMLC.O	↓	94.25	94.38	5.4	-	0.1 m	-10.2%	-5.8%	-7.6%
LFL.O	↓	19.30	19.30	8.9	-	-	-2.5%	-5.9%	-6.5%

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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