

**MCBG declines further**

Semdex	↓	2,131.32	Sem-10	↓	387.05	Demex	↑	280.54
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The **SEMDEX** registers a meagre decline of 4.45 points to end at 2,131.32 (-0.2%) with market value traded (MVT) amounting to Rs23.2m for a total volume traded (TVT) of 1.2m.

**Foreign Investors (FI)** are net sellers with FIP amounting to Rs1.1m compared to FIS of Rs6.8m.

**MCBG** extends its losing streak for the second straight session, declining by -0.3% to close at Rs336.00 on 27.5k units. Value traded for the day amounts to Rs9.3m, accounting for 39.8% of MVT.

**International equity markets:** US stocks moved higher in the green territory following the release of the unemployment rate by the Bureau of Labour Statistics. For the month of September, the unemployment rate remained unchanged at 3.8%. In addition, the US economy added 336k jobs in September, beating estimates of 171k jobs. On one hand, the jobs report looks favourable for the US economy, on the other hand, the tight labour market might lead to another potential rate hike. The S&P 500 rose by +1.2%, the Dow Jones Industrial Average (^DJI) inched up by +0.9%, and Nasdaq added +1.6%.

Commerce: **HAREL** jumps to Rs28.90 (+7.0%), albeit on 0.3k units.

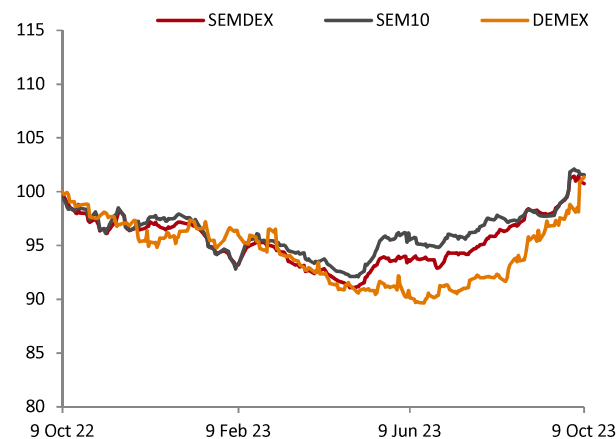
Industry: **MCFI** inches up to Rs6.70 (+1.5%) on 0.5k units.

Leisure & Hotels: **NMH** tumbles by -4.7% to close at Rs12.25 on 4.7k units.

Property: **ASCENCIA** declines further to Rs20.60 (-1.9%).

Investments: **ALTEO** Rs10.90 (+3.8%), **CIEL** Rs7.20 (+1.4%), **ENL** Rs23.20 (-1.3%), **FINCORP** Rs17.50 (+2.6%), **PAD** Rs103.00 (-0.5%), **POLICY** Rs3.10 (+3.3%), **ROGERS** Rs32.05 (+0.2%), **TERRA** Rs23.00 (-1.1%).

**AFREXIM** rises to USD2.90 (+1.8%) on only 10 units.

**Market Indices: 1 year Trend (Rebased 100)**

**Market Activity**

Top gainers		Top losers	
H MALLAC	7.0%	NMH.O	-4.7%
ALTEO	3.8%	ASCENCIA	-1.9%
POLICY	3.3%	SBM BD A2	-1.5%
FINCORP	2.6%	ENL	-1.3%
AFREXIM	1.8%	TERRA	-1.1%
Most Active (Value)		Key Market Statistics	
MCBG	9.3 m	Market Cap (Rs)	269.0 bn
TERRA	3.9 m	Market Cap (USD)	6.1 bn
SUN	3.6 m	Market Div Yield	4.1%
CIEL	1.6 m	Market P/E	7.0x
IBLL	0.7 m	FI Participation	0.1x

**Summary Market Data**

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↓	2,131.32	-0.21%	2.8%	6.9%	
SEM-ASI	↓	1,953.96	-0.1%	2.0%	5.0%	
SEM-VWAP	↓	1,957.73	-0.16%	2.1%	5.2%	
SEM10	↓	387.05	-0.06%	3.9%	5.8%	
DEMEX	↑	280.54	0.4%	6.1%	11.5%	
<b>Global Indices</b>						
Japan: Nikkei 225	↓	30,994.67	-0.3%	-6.8%	-5.4%	
US: S&P 500	↑	4,308.50	1.2%	-3.5%	-2.3%	
UK: FTSE 100	↑	7,494.58	0.6%	0.92%	2.9%	
Europe: Euro Stoxx 50	↑	4,144.43	1.1%	-2.2%	-1.9%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↑	114,169.6	0.8%	-1.6%	-2.8%	
Russia: MICEX	↑	3,144.89	0.4%	-3.1%	11.5%	
India: SENSEX	↑	65,995.63	0.6%	0.2%	0.3%	
China: Shanghai Comp	→	3,110.48	-	-1.5%	-3.0%	
South Africa: JSE All Share	↑	71,657.25	0.6%	-3.7%	-3.3%	

Commodities		Closing	ID Δ	I2M Δ	Currencies		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	84.58	0.6%	-10.9%	USDMUR	⇒	44.65	-	0.1%
Gold	↑	1,833.01	0.7%	7.1%	EURMUR	↑	47.56	0.1%	8.8%
Platinum	↑	881.56	2.0%	-4.4%	GBPMUR	↑	54.98	0.2%	10.4%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-I0</b>									
MCBG	↓	336.00	336.44	5.83	0.6 m	3.1 m	-0.3%	4.0%	6.3%
IBLL	⇒	46.50	46.50	10.33	-	-	-	4.5%	3.3%
SBMH	⇒	4.68	4.68	3.32	-	-	-	5.2%	4.5%
AFREXIM	↑	2.90	2.90	4.80	-	-	1.8%	3.6%	9.4%
GRIT (USD)	⇒	0.38	0.38	14.50	-	-	-	5.6%	8.6%
CIEL	↑	7.20	7.19	4.59	-	-	1.4%	5.9%	8.4%
LUX	⇒	60.00	60.00	5.64	-	-	-	-3.2%	14.3%
ROGERS	↑	32.05	32.05	8.37	-	-	0.2%	3.4%	7.9%
ASCENCIA	↓	20.60	20.65	9.45	-	-	-1.9%	-0.5%	3.0%
PBL	⇒	539.00	539.00	12.11	-	-	-	0.2%	1.7%
<b>DEM Most Active (3-month average)</b>									
LAVASTONE	⇒	1.53	1.53	6.1	-	-	-	-4.4%	-
LFL.O	⇒	19.30	19.30	8.9	-	-	-	-5.9%	-6.5%
MIWA	⇒	0.39	0.39	9.8	-	-	-	34.5%	44.4%

#### 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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