

ASCENCIA hits new 52-week low

Semdex ↓ 2,087.18 Sem-10 ↓ 377.88 Demex ↓ 274.52

The **SEMDEX** moves lower by 4.90 points to end at 2,087.18 (-0.2%) with market value traded (MVT) amounting to Rs33.1m for a total volume traded (TVT) of 1.5m. **DEMEX** slips to 274.52 (-0.5%).

Foreign Investors (FI) are net buyers with FIP amounting to Rs4.6m compared to FIS of Rs0.8m.

ASCENCIA drops by -5.7%, hitting a fresh 52-week low of Rs19.20 on 517k units. Value traded for the day amounts to Rs9.9m, accounting for 30.0% of MVT. The stock closed at Rs20.35 yesterday, after stagnating at Rs20.50 over the past four sessions. Currently, it is down by -22.4% year-to-date.

International equity markets: US stocks closed mostly flat in yesterday's session. More bank earnings rolled out, with Bank of America, and Goldman Sachs beating Street expectations. US Retail Sales rose by 0.7% m/m in September, above estimates of 0.3%. Consumers' spending patterns remain on an upward trajectory despite high interest rates, implying that third quarter economic growth might be strong. The S&P 500 and the Dow Jones Industrial Average (^DJI) closed flat, while Nasdaq inched down by -0.3%.

Finance: **MCBG** slips further to Rs324.75 (-0.1%) on 18.9k units.

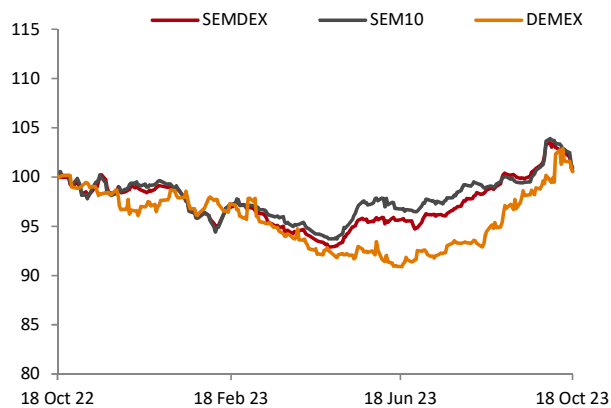
Commerce: **INNODIS** inches up to Rs35.15 (+0.1%) on only 0.1k units.

Leisure & Hotels: **NMH** snaps its losing-streak as it rises slightly to Rs11.25 (+2.3%) on 10.3k units. **LUX** falls to Rs59.50 (-0.8%) on 50.8k units.

Property: **BLL** jumps to Rs0.57 (+5.6%) on 5k units.

Investments: **CIEL** Rs7.20 (-0.6%), **MDIT** Rs2.05 (+2.5%), **MSE** Rs53.50 (-0.9%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BLUELIFE	5.6%	ASCENCIA	-5.7%
MDIT	2.5%	MEDINE	-0.9%
NMH.O	2.3%	LUX	-0.8%
NORTHFIELDS	0.2%	CIEL	-0.6%
INNODIS	0.1%	MCBG	-0.1%
Most Active (Value)		Key Market Statistics	
ASCENCIA	9.9 m	Market Cap (Rs)	262.9 bn
MCBG	6.1 m	Market Cap (USD)	5.9 bn
CIEL	3.5 m	Market Div Yield	4.1%
LUX	3.0 m	Market P/E	6.7x
CMDC	2.0 m	FI Participation	0.1x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,087.18	-0.23%	0.6%	4.7%	
SEM-ASI	↓	1,923.66	-0.2%	0.5%	3.5%	
SEM-VWAP	↓	1,925.03	-0.50%	0.5%	3.6%	
SEM10	↓	377.88	-0.41%	1.4%	3.7%	
DEMEX	↓	274.52	-0.5%	2.4%	9.0%	
Global Indices						
Japan: Nikkei 225	↑	32,040.29	1.2%	-4.5%	-1.1%	
US: S&P 500	↓	4,373.20	-0.0%	-1.7%	-3.3%	
UK: FTSE 100	↑	7,675.21	0.6%	-0.47%	3.6%	
Europe: Euro Stoxx 50	↑	4,152.32	0.1%	-3.3%	-4.7%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	115,908.4	-0.5%	-2.4%	-2.0%	
Russia: MICEX	↑	3,247.15	0.4%	3.0%	11.3%	
India: SENSEX	↑	66,428.09	0.4%	-2.1%	-0.2%	
China: Shanghai Comp	↑	3,083.50	0.3%	-1.1%	-3.9%	
South Africa: JSE All Share	↓	72,831.80	-0.4%	-2.4%	-5.7%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	89.90	0.3%	-1.9%	USDMUR	↓	44.75	-0.1%	-0.9%
Gold	↑	1,923.18	0.2%	16.6%	EURMUR	↑	47.76	0.1%	7.4%
Platinum	↑	899.65	0.5%	-1.6%	GBPMUR	↓	54.99	-0.3%	7.0%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	324.75	324.79	5.63	0.0 m	0.6 m	-0.1%	0.3%	2.8%
IBLL	⇒	45.00	45.00	10.00	-	-	-	1.4%	-
SBMH	⇒	4.55	4.55	3.23	-	-	-	2.2%	1.8%
AFREXIM	⇒	2.83	2.83	4.69	-	-	-	0.7%	2.9%
GRIT (USD)	⇒	0.40	0.40	15.27	-	-	-	11.1%	-9.1%
CIEL	↓	7.20	7.21	4.59	3.49 m	-	-0.6%	7.5%	14.6%
LUX	↓	59.50	59.54	5.60	-	0.1 m	-0.8%	-2.5%	15.5%
ROGERS	⇒	32.60	32.74	5.13	-	-	-	4.7%	8.7%
ASCENCIA	↓	19.20	19.20	8.81	-	0.136 m	-5.7%	-7.0%	-3.5%
PBL	⇒	537.00	537.00	12.07	-	-	-	-0.2%	0.4%
DEM Most Active (3-month average)									
ATTITUDE	↓	11.20	11.20	14.2	-	-	-1.8%	-5.1%	-
LFL.O	↓	17.95	17.95	8.0	0.009 m	-	-0.3%	-12.4%	-11.1%
LAVASTONE	⇒	1.60	1.60	6.4	0.00 m	-	-	-0.6%	-1.2%

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
18-Oct-23	ASCENCIA	The Board of Ascencia Limited wishes to inform that Mr. Frédéric Tyack will be stepping down from his position as Chief Executive Officer to take on new challenges. While this decision will be effective December 31, 2023, Mr. Tyack will be working alongside the company's management team under a consultancy agreement until December 2024, ensuring a smooth handing over to the upcoming leadership structure.
13-Oct-23	CIM	CIM Financial Services Ltd is pleased to announce that on 13 October 2023, the Listing Executive Committee of the SEM approved the listing of a new series of notes issued by CFSL on the Official Market of the SEM. The notes were part of a MUR 1,500,000,000 issuance via a private placement under a MUR 9,000,000,000 Medium Term Note Programme.

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