

### MCBG declines for fifth straight session

Semdex	2,087.23	Sem-10	377.46	Demex	275.53
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The **SEMDEX** remains nearly unchanged at 2,087.23 with market value traded (MVT) amounting to Rs31.2m for a total volume traded (TVT) of 2.9m. **DEMEX** inches up to 275.53 (+0.4%).

**MCBG** extends its losses, as it declines for the fifth straight session. The stock retreats by -0.1%, closing lower at Rs324.50 on 30.3k units. Value traded for the day amounts to Rs9.8m, accounting for 31.6% of MVT. Currently, it is up by +5.7% year-to-date.

Commerce: **VIVO** rises slightly to Rs325.50 (+0.1%) on only 0.2k units.

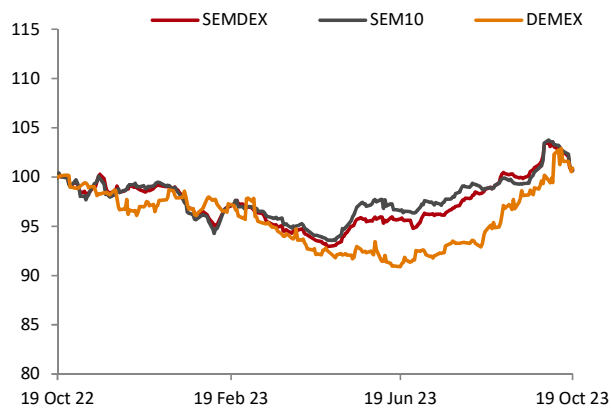
Leisure & Hotels: **NMH** extends its gains, closing higher at Rs11.50 (+2.2%) on 108.7k units. **NHM Pref** tumbles to Rs11.00 (-2.2%) on 55.5k units.

Investments: **CIEL** Rs7.10 (-1.4%), **MDIT** Rs2.00 (-2.4%), **TERRA** Rs24.00 (+2.1%).

**Foreign Investors (FI)** are net buyers with FIP amounting to Rs8.4m compared to FIS of Rs5.4m.

**International equity markets:** US equities finished yesterday's session in the red territory, with geopolitical tensions in the Middle East and the spike in the 10-year Treasury note yield driving markets. Brent crude oil jumped to \$91.50/barrel following Iran's call for an oil embargo on Israel. The S&P 500 fell by -1.3%, the Dow Jones Industrial Average (^DJI) down by -1.0% and Nasdaq declined by -1.6%.

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



### Market Activity

Top gainers		Top losers	
NMH.O	2.2%	MDIT	-2.4%
TERRA	2.1%	NMH.P	-2.2%
VIVO	0.1%	CIEL	-1.4%
		SBM BD A2	-0.5%
		MCBG	-0.1%
Most Active (Value)		Key Market Statistics	
MCBG	9.8 m	Market Cap (Rs)	262.9 bn
CIEL	8.5 m	Market Cap (USD)	5.9 bn
MDIT	2.3 m	Market Div Yield	4.1%
ASCENCIA	1.9 m	Market P/E	6.7x
NMH.O	1.2 m	FI Participation	0.2x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX		2,087.23	0.00%	0.2%	4.8%	
SEM-ASI		1,924.17	0.0%	0.2%	3.5%	
SEM-VWAP		1,926.22	0.06%	0.2%	3.6%	
SEM10		377.46	-0.11%	0.8%	3.3%	
DEMEX		275.53	0.4%	2.3%	9.3%	
<b>Global Indices</b>						
Japan: Nikkei 225		32,042.25	0.0%	-4.4%	-1.4%	
US: S&P 500		4,314.60	-1.3%	-3.1%	-5.3%	
UK: FTSE 100		7,588.00	-1.1%	-0.85%	1.8%	
Europe: Euro Stoxx 50		4,105.86	-1.1%	-3.3%	-6.0%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA		114,059.6	-1.6%	-3.6%	-3.2%	
Russia: MICEX		3,249.21	0.1%	3.6%	10.0%	
India: SENSEX		65,877.02	-0.8%	-2.5%	-1.4%	
China: Shanghai Comp		3,058.71	-0.8%	-2.2%	-4.4%	
South Africa: JSE All Share		71,968.67	-1.2%	-2.6%	-6.7%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	91.50	1.8%	1.6%	USDMUR	↑	44.80	0.1%	1.2%
Gold	↑	1,947.55	1.3%	17.9%	EURMUR	↓	47.63	-0.3%	8.9%
Platinum	↓	887.95	-1.3%	-2.2%	GBPMUR	↓	54.84	-0.3%	9.7%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↓	324.50	324.67	5.63	-	4.4 m	-0.1%	-0.2%	2.7%
IBLL	⇒	45.00	45.00	10.00	-	-	-	1.4%	-
SBMH	⇒	4.55	4.55	3.23	-	-	-	1.1%	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	↓	7.10	7.20	4.52	8.05 m	-	-1.4%	4.7%	9.2%
LUX	⇒	59.50	59.50	5.60	-	-	-	-2.5%	15.5%
ROGERS	⇒	32.60	32.60	5.13	-	-	-	4.7%	8.7%
ASCENCIA	⇒	19.20	19.20	8.81	-	0.033 m	-	-7.0%	-3.5%
PBL	⇒	537.00	537.00	12.07	-	-	-	-0.2%	0.4%
<b>DEM Most Active (3-month average)</b>									
LAVASTONE	↓	1.55	1.55	6.2	-	-	-3.1%	-3.7%	-
LFL.O	⇒	17.95	17.95	8.0	0.004 m	-	-	-12.4%	-11.1%
EUDCOS	⇒	14.00	14.03	9.7	-	-	-	-6.4%	-5.4%

#### 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
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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