

The SEMDEX inches down by -0.1%

Semdex	↓	2,084.97	Sem-10	↓	376.96	Demex	↓	274.62
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The **SEMDEX** declines to 2,084.97 (-0.1%) with market value traded (MVT) amounting to Rs821.8m for a total volume traded (TVT) of 4.7m. **DEMEX** reverses gains and tumbles to 274.62 (-0.3%). The S&P 500 fell by -0.9%, the Dow Jones Industrial Average (^DJI) down by -0.8% and Nasdaq declined by -1.0%.

Finance: **MCBG** falls further to Rs324.00 (-0.2%), **SBMH** closes lower at Rs4.51 (-0.9%), **SWAN (General)** inches up to Rs465.00 (+0.8%) on 1.2k units.

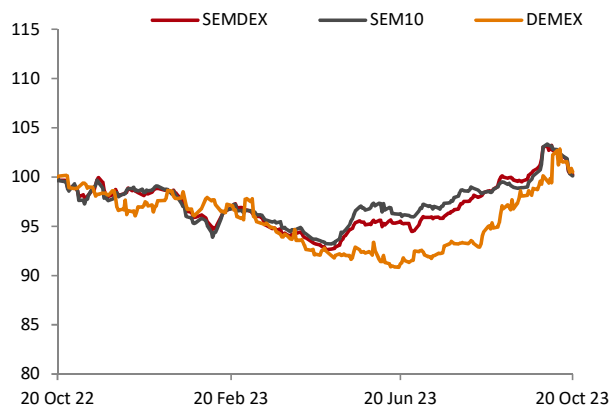
Leisure & Hotels: **NMH Pref** tumbles to Rs10.95 (-0.5%).

Investments: **ALTEO** inches down to Rs10.85 (-0.5%) on only 0.1k units, **ENL** retreats to Rs22.10 (-0.5%) on 4.5k units, **FINCORP** slips to Rs18.00 (-1.4%), **POLICY** rises to Rs3.05 (+1.7%).

Foreign Investors (FI) are net sellers with FIP amounting to Rs1.5m compared to FIS of Rs5.7m.

International equity markets: US equities fell, while bond yields continued to rise. The 10-year Treasury note moved closer to 5%. During the event hosted by the Economic Club of New York, the Federal Reserve Chairman, Jerome Powell, signaled that they will most probably extend their pause in rate hikes at their November meeting. Nevertheless, they will maintain their data-driven approach.















Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BAYPORT	5.2%	FINCORP	-1.4%
POLICY	1.7%	SBMH	-0.9%
ADBF	1.2%	ALTEO	-0.5%
SWANGEN	0.8%	NMH.P	-0.5%
		ENL	-0.5%
Most Active (Value)		Key Market Statistics	
BAYPORT	785.6 m	Market Cap (Rs)	262.6 bn
MCBG	16.9 m	Market Cap (USD)	5.9 bn
IBLL	14.4 m	Market Div Yield	4.1%
NIT	1.3 m	Market P/E	6.7x
NMH.O	1.0 m	FI Participation	0.9x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,084.97	-0.11%	0.1%	4.6%	
SEM-ASI	↓	1,922.31	-0.1%	0.1%	3.2%	
SEM-VWAP	↓	1,925.13	-0.06%	0.2%	3.4%	
SEM10	↓	376.96	-0.13%	0.6%	3.1%	
DEMEX	↓	274.62	-0.3%	1.9%	8.9%	
Global Indices						
Japan: Nikkei 225	↓	31,430.62	-1.9%	-5.5%	-4.5%	
US: S&P 500	↓	4,278.00	-0.8%	-3.7%	-6.3%	
UK: FTSE 100	↓	7,499.53	-1.2%	-2.10%	-1.2%	
Europe: Euro Stoxx 50	↓	4,090.33	-0.4%	-3.6%	-6.2%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	114,004.3	-0.0%	-3.3%	-3.0%	
Russia: MICEX	↑	3,255.16	0.2%	5.6%	10.6%	
India: SENSEX	↓	65,629.24	-0.4%	-2.9%	-2.2%	
China: Shanghai Comp	↓	3,005.39	-1.7%	-3.8%	-6.0%	
South Africa: JSE All Share	↓	70,961.33	-1.4%	-3.9%	-7.9%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	92.38	1.0%	-0.0%	USDMUR	⇒	44.80	-	1.2%
Gold	↑	1,974.46	1.4%	21.2%	EURMUR	↑	47.81	0.4%	9.4%
Platinum	↑	895.15	0.8%	1.3%	GBPMUR	↑	54.88	0.1%	9.8%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	324.00	324.05	5.62	-	16.6 m	-0.2%	-0.3%	2.5%
IBLL	⇒	45.00	45.00	10.00	8.09 m	-	-	1.4%	-
SBMH	↓	4.51	4.52	3.20	0.05 m	-	-0.9%	0.2%	0.9%
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	7.10	4.52	-	-	-	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	-	0.038 m	-	-7.0%	-3.5%
PBL	⇒	537.00	537.00	12.07	-	-	-	-0.2%	0.4%
DEM Most Active (3-month average)									
LAVASTONE	⇒	1.55	1.55	6.2	0.02 m	0.0 m	-	-3.1%	-
PHIN	↑	304.25	304.25	7.7	-	-	0.1%	0.3%	1.4%
ATTITUDE	⇒	11.20	11.20	14.2	-	-	-	-5.1%	3.2%

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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