

### LUX declines to one-month low

Semdex ↓ 2,077.01 Sem-10 ↓ 375.69 Demex ↓ 272.78

The **SEMDEX** falls by 7.95 points to finish at 2,077.01 (-0.4%) with market value traded (MVT) amounting to Rs26.5m for a total volume traded (TVT) of 1.7m. **DEMEX** reverses gains and tumbles to 272.78 (-0.7%).

**LUX** falls by -0.4% to close at fresh one-month low of Rs59.25 on 21.5k units. LUX posts revenue of Rs1.7bn in the first quarter of the FY2024, representing an increase of +13.6% year-on-year. Loss attributable to the group shrinks from Rs363.0m to Rs56.2m for the current quarter ending 30 September 2023. LUX\* Belle Mare was not operational for the quarter under review, following reconstruction works from the fire incident.

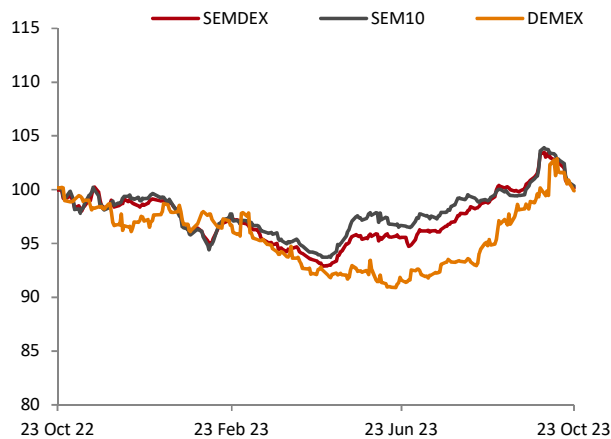
Finance: **MCBG** declines further to Rs322.00 (-0.6%) on 11.3k units, **MCBG Pref** rises to Rs10.25 (+1.0%).

Industry: **MOROIL** closes lower at Rs17.20 (-0.6%) on 0.7k units.

Leisure & Hotels: **NMH** slips to Rs11.30 (-1.7%) on 7.4k units.

Investments: **ALTEO** retreats to Rs10.75 (-0.9%) on 7.3k units, **BMH** inches up to Rs23.05 (+0.2%), **CIEL** closes lower at Rs7.04 (-

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



0.9%), **MDIT** falls to Rs1.99 (-0.5%), **MSE** sheds -3.7% to close at Rs51.50, **POLICY** down to Rs3.00 (-1.6%).

**Foreign Investors (FI)** are net buyers with FIP amounting to Rs6.5m compared to FIS of Rs3.5m.

**International equity markets:** US equities closed in the red territory on Friday as investors continue to digest the comments of Fed Chair, Jerome Powell. The 10-year Treasury note yield moved closer to 5%, a level not seen since July 2007 – before the Global Financial Crisis. The S&P 500 fell by -1.3%, the Dow Jones Industrial Average (^DJI) down by -0.9% and Nasdaq declined by -1.5%.

### Market Activity

Top gainers		Top losers	
MCBGPREF	1.0%	MEDINE	-3.7%
BMH	0.2%	NMH.O	-1.7%
		POLICY	-1.6%
		ALTEO	-0.9%
		CIEL	-0.8%
Most Active (Value)		Key Market Statistics	
NMH.P	15.9 m	Market Cap (Rs)	261.6 bn
MCBG	3.6 m	Market Cap (USD)	5.9 bn
IBLL	2.3 m	Market Div Yield	4.2%
MEDINE	1.7 m	Market P/E	6.7x
LUX	1.3 m	FI Participation	0.2x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	<span style="color:red">↓</span>	2,077.01	-0.38%	-0.7%	4.0%	
SEM-ASI	<span style="color:red">↓</span>	1,916.44	-0.3%	-0.7%	2.7%	
SEM-VWAP	<span style="color:red">↓</span>	1,921.08	-0.21%	-0.5%	3.0%	
SEM10	<span style="color:red">↓</span>	375.69	-0.34%	-0.3%	2.5%	
DEMEX	<span style="color:red">↓</span>	272.78	-0.7%	1.0%	7.4%	
<b>Global Indices</b>						
Japan: Nikkei 225	<span style="color:red">↓</span>	31,259.36	-0.5%	-5.3%	-3.8%	
US: S&P 500	<span style="color:red">↓</span>	4,224.16	-1.3%	-4.0%	-6.9%	
UK: FTSE 100	<span style="color:red">↓</span>	7,402.14	-1.3%	-4.26%	-3.2%	
Europe: Euro Stoxx 50	<span style="color:red">↓</span>	4,024.68	-1.6%	-5.9%	-8.0%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	<span style="color:red">↓</span>	113,155.3	-0.7%	-4.7%	-4.2%	
Russia: MICEX	<span style="color:green">↑</span>	3,269.27	0.4%	6.6%	12.1%	
India: SENSEX	<span style="color:red">↓</span>	65,397.62	-0.4%	-2.1%	-3.2%	
China: Shanghai Comp	<span style="color:red">↓</span>	2,983.06	-0.7%	-4.0%	-5.9%	
South Africa: JSE All Share	<span style="color:red">↓</span>	70,198.01	-1.1%	-6.2%	-8.9%	

Commodities					Currencies				
		Closing	ID Δ	12M Δ			Closing	ID Δ	12M Δ
Oil (Brent)	↓	92.16	-0.2%	-0.2%	USDMUR	→	44.80	-	1.2%
Gold	↑	1,981.40	0.4%	21.7%	EURMUR	↑	47.81	0.4%	9.4%
Platinum	↑	899.61	0.5%	-1.6%	GBPMUR	↑	54.88	0.1%	9.8%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
<b>SEM-10</b>									
MCBG	↓	322.00	323.46	5.58	1.2 m	3.3 m	-0.6%	-1.8%	1.9%
IBLL	→	45.00	45.00	10.00	0.45 m	-	-	1.4%	-
SBMH	→	4.51	4.51	3.20	-	-	-	-0.2%	0.4%
AFREXIM	→	2.83	2.83	4.69	-	-	-	-0.7%	1.1%
GRIT (USD)	→	0.40	0.40	15.27	-	0.00 m	-	2.6%	-
CIEL	↓	7.04	7.05	4.48	-	-	-0.8%	2.0%	8.3%
LUX	→	59.50	59.28	5.57	-	-	-	-2.5%	15.5%
ROGERS	→	32.60	32.12	5.13	-	-	-	4.7%	8.7%
ASCENCIA	→	19.20	19.20	8.81	-	-	-	-7.2%	-4.0%
PBL	→	537.00	537.00	12.07	-	-	-	-0.2%	0.4%
<b>DEM Most Active (3-month average)</b>									
MIWA	↓	0.36	0.36	9.0	-	0.6 m	-7.7%	5.9%	-
EUDCOS	→	14.00	14.00	9.7	-	-	-	-6.4%	-3.4%
LAVASTONE	↑	1.66	1.65	6.6	0.00 m	-	7.1%	3.7%	-12.6%

#### 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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