

### MCBG holds steady at Rs324.00

Semdex	↓	2,076.99	Sem-10	↓	373.77	Demex	↑	265.44
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The **SEMDEX** inches down by -0.1% to close at 2,076.99 with market value traded (MVT) amounting to Rs34.2m for a total volume traded (TVT) of 2.1m.

Investments: **ALTEO** Rs10.45 (+1.0%), **CAUDAN** Rs0.57 (+3.6%), **CIEL** Rs7.00 (-1.4%), **ENL** Rs20.25 (-1.5%), **MDIT** Rs2.06 (+0.5%), **POLICY** Rs3.50 (+0.3%).

**MCBG** remains stable at Rs324.00 for the twelfth straight session. Value traded for the day amounts to Rs19.3m, accounting for 56.3% of total market value traded. The stock is up by +5.9% year-to-date.

**Foreign Investors (FI)** on the Official market are net sellers with FIP standing at Rs0.7m compared to FIS of Rs12.4m.

Finance: **MCBG Pref** slips further to Rs10.10 (-0.5%) on only 0.9k units.

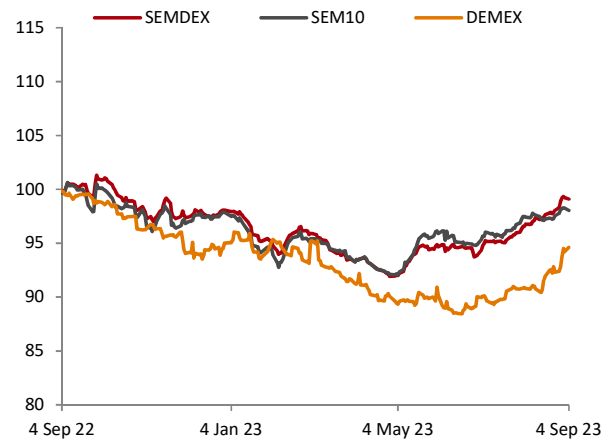
**International equity markets:** US stocks ended mixed in Friday's session. The Institute for Supply Management (ISM) published the US Manufacturing Purchasing Managers' Index (PMI) for the month of August, which came at 47.6. The figure shows that the manufacturing sector is still in the contraction phase, marking the 10<sup>th</sup> consecutive month that this sector has been contracting. The S&P 500 fell by -0.2%, the Dow Jones Industrial Average (^DJ) down by -0.5% and Nasdaq edged higher by +0.1%.

Industry: **PIM** moves lower to Rs40.60 (-1.0%) on 0.6k units.

Leisure & Hotel: **ASL** rises to Rs71.25 (+0.4%), **NMH** falls by -0.9% to close at Rs11.40 on 179.6k units and **SUN** slips to Rs39.00 (-1.3%) on 7k units.

Property: **BLL** moves up to Rs0.59 (+1.7%) on only 19.8k units.

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



### Market Activity

Top gainers		Top losers	
CAUDAN	3.6%	AFREXIM	-1.8%
BLUELIFE	1.7%	ENL	-1.5%
ALTEO	1.0%	CIEL	-1.4%
MDIT	0.5%	SUN	-1.3%
ASL	0.4%	PIM	-1.0%
Most Active (Value)		Key Market Statistics	
MCBG	19.3 m	Market Cap (Rs)	261.6 bn
ENL	2.6 m	Market Cap (USD)	5.7 bn
MDIT	2.5 m	Market Div Yield	3.8%
NMH.O	2.0 m	Market P/E	9.2x
LUX	2.0 m	FI Participation	0.2x

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↓	2,076.99	-0.13%	2.4%	4.7%	
SEM-ASI	↓	1,926.83	-0.1%	2.3%	4.2%	
SEM-VWAP	↓	1,928.27	-0.20%	2.3%	4.3%	
SEM10	↓	373.77	-0.22%	0.6%	2.2%	
DEMEX	↑	265.44	0.4%	4.2%	5.0%	
<b>Global Indices</b>						
Japan: Nikkei 225	↑	32,710.62	0.3%	-2.3%	5.0%	
US: S&P 500	↑	4,515.77	0.2%	-1.3%	7.0%	
UK: FTSE 100	↑	7,464.54	0.3%	-2.63%	-0.3%	
Europe: Euro Stoxx 50	↓	4,282.64	-0.3%	-2.8%	0.6%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↑	117,893.0	1.9%	-2.8%	6.6%	
Russia: MICEX	↑	3,231.35	0.1%	4.5%	18.7%	
India: SENSEX	↑	65,387.16	0.9%	-1.6%	4.7%	
China: Shanghai Comp	↑	3,133.25	0.4%	-4.8%	-2.2%	
South Africa: JSE All Share	↓	74,787.00	-0.2%	-4.9%	-1.3%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	88.55	2.0%	-4.1%	USDMUR	45.94	0.2%	1.4%
Gold	↓	1,940.06	-0.0%	14.4%	EURMUR	50.28	-0.6%	8.1%
Platinum	↓	963.85	-0.8%	15.9%	GBPMUR	58.74	-0.3%	7.2%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-I10</b>									
MCBG	⇒	324.00	324.00	8.07	-	11.2 m	-	1.3%	-0.6%
IBLL	⇒	44.60	44.60	25.93	-	-	-	-2.0%	-0.9%
SBMH	⇒	4.50	4.50	3.20	-	0.23 m	-	1.1%	0.9%
AFREXIM	↓	2.80	2.80	4.64	-	-	-1.8%	-5.1%	5.7%
ENL	↓	20.25	20.04	9.16	-	-	-1.5%	1.3%	4.9%
CIEL	↓	7.00	7.08	9.09	-	-	-1.4%	3.2%	7.4%
VIVO	⇒	313.00	313.00	17.47	-	-	-	1.0%	7.2%
ROGERS	⇒	31.00	31.00	8.09	-	0.930 m	-	2.8%	4.4%
ASCENCIA	⇒	20.70	20.70	10.05	-	-	-	3.5%	3.5%
PBL	⇒	538.00	538.00	21.21	0.3 m	-	-	-0.4%	3.3%
<b>DEM Most Active (3-month average)</b>									
MIWA	⇒	0.30	0.30	0.0	-	-	-	-	-
LAVASTONE	↑	1.65	1.64	6.6	0.001 m	0.0 m	3.1%	-2.9%	-10.8%
CHSL	↑	23.00	23.00	11.2	-	-	4.5%	9.0%	14.4%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
25-Aug-23	CSE	DEM	Dividend	Final	5.00	11-Sep-23	5-Oct-23
11-Aug-23	VIVO	Official	Dividend	Interim	1.58	28-Aug-23	15-Sep-23
8-Aug-23	NOVUS	DEM	Dividend	Final	0.22	23-Aug-23	15-Oct-23
8-Aug-23	CIMO	DEM	Dividend	Interim	0.35	23-Aug-23	5-Sep-23

#### Latest Announcements

Date	Company	Details
30-Aug-23	CMSP (I) Ltd	The board of directors of CM Structured Products (I) Ltd is pleased to inform its shareholders and the public in general that (i) an offer for subscription and listing of secured credit-linked notes for an aggregate nominal amount of up to MUR 1,300,000,000 at a nominal amount of MUR 1,000 on the Official Market of the SEM has been approved by the Listing Executive Committee of the SEM, and (ii) the prospectus pertaining to the Notes, deemed to be the listing particulars for SEM's purposes, has been granted registration by the Financial Services Commission.
15-Aug-23	OMNICANE	Omnican Limited has decided to appoint Mr Jimmy Tong Sam as Chairman of the Company in replacement of Mr Harold Mayer who expressed the wish to step down as Chairman whilst remaining a member of the Board as Non-Executive Director.

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