

CIEL sheds -0.9%

Semdex	↓	2,076.92	Sem-10	↓	372.91	Demex	↑	266.84
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The **SEMDEX** shrugs off yesterday's meagre gains and slips by 2.24 points to finish at 2,076.92 (-0.1%) with market value traded (MVT) amounting to Rs21.9m for a total volume traded (TVT) of 1.5m.

Foreign Investors (FI) are net sellers with FIP standing at Rs1.2m compared to FIS of Rs6.8m.

CIEL sheds -0.9%, falling from Rs6.96 to Rs6.90. Value traded for the day amounts to Rs6.4m, accounting for 29.1% of total market value traded. FIS stands at Rs1.2m. The stock is up by +11.3% year-to-date.

International equity markets: Major indices in the US dropped in the red territory. US Purchasing Managers' Index (PMI) published by the Institute for Supply Management (ISM) came at 54.5 for the month of August, higher than expectations of 52.5. The data shows that the services sector has expanded, and marks the eighth consecutive month of expansion. On the other hand, investors began to worry about inflation remaining sticky for longer post the recent announcement of the extended production cuts from OPEC+. The S&P 500 tumbled by -0.7%, the Dow Jones Industrial Average (^DJ) down by -0.6%, and NASDAQ fell by almost -1.0%.

Finance: **MCBG Pref** moves higher to Rs10.35 (+1.5%) on 1.5k units.

Commerce: **INNODIS** rises to Rs34.65 (+0.1%).

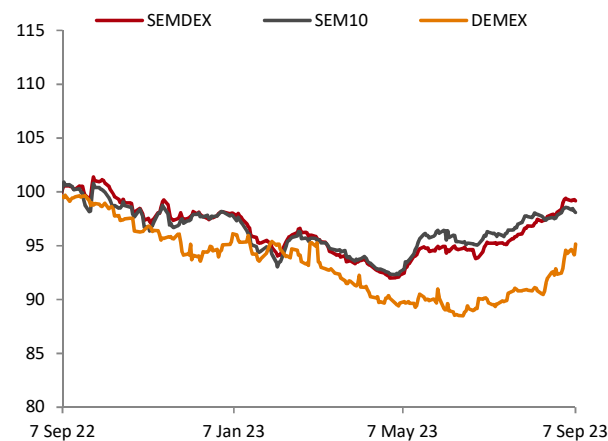
Industry: **PIM** slips to Rs40.30 (-0.7%) on 2.8k units.

Leisure & Hotel: **ASL** down to Rs71.00 (-0.4%), **LOTO** gains +1.3% to close at Rs7.60 (+1.3%) on 57.6k units. **NMH** reverses yesterday's gains and tumbles to Rs11.60 (-1.7%) on 152.5k units.

Sugar: **OMNICANE** slips to Rs23.25 (-3.1%) on 1.1k units.

Investments: **ENL** Rs20.80 (-1.0%), **MDIT** Rs2.05 (-1.9%), **PAD** Rs100.00 (+1.0%), **POLICY** Rs3.49 (-0.3%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
MCBGPREF	1.5%	OMNICANE	-3.1%
LOTTO	1.3%	MDIT	-1.9%
PAD	1.0%	NMH.O	-1.7%
INNODIS	0.1%	ENL	-1.0%
		FTPT.D0140	-0.9%
Most Active (Value)		Key Market Statistics	
MCBG	7.0 m	Market Cap (Rs)	261.6 bn
CIEL	6.4 m	Market Cap (USD)	5.8 bn
NMH.O	1.8 m	Market Div Yield	3.8%
CMDC	1.0 m	Market P/E	9.2x
SBMH	0.8 m	FI Participation	0.2x

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,076.92	-0.11%	2.4%	5.2%	
SEM-ASI	↓	1,916.25	-0.3%	1.8%	4.1%	
SEM-VWAP	↓	1,918.55	-0.10%	1.8%	4.2%	
SEM10	↓	372.91	-0.13%	0.5%	2.7%	
DEMEX	↑	266.84	1.1%	4.8%	6.9%	
Global Indices						
Japan: Nikkei 225	↑	33,241.02	0.6%	3.3%	2.3%	
US: S&P 500	↓	4,465.48	-0.7%	-0.3%	4.2%	
UK: FTSE 100	↓	7,426.14	-0.2%	-1.83%	-2.6%	
Europe: Euro Stoxx 50	↓	4,238.26	-0.7%	-2.2%	-1.3%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	115,985.3	-1.1%	-2.9%	1.2%	
Russia: MICEX	↓	3,245.47	-0.6%	4.9%	21.0%	
India: SENSEX	↑	65,880.52	0.2%	0.2%	4.9%	
China: Shanghai Comp	↑	3,158.08	0.1%	-4.0%	-1.2%	
South Africa: JSE All Share	↓	74,411.02	-0.8%	-3.3%	-3.2%	

Commodities				Currencies					
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ	
Oil (Brent)	↑	90.60	0.6%	-2.4%	USDMUR	⇒	45.60	-	2.1%
Gold	↓	1,916.56	-0.5%	12.7%	EURMUR	↓	49.40	-0.1%	10.5%
Platinum	↓	914.10	-1.9%	6.9%	GBPMUR	↓	57.58	-0.6%	11.1%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-I0									
MCBG	⇒	323.00	323.00	8.05	0.4 m	4.6 m	-	0.8%	0.9%
IBLL	⇒	44.50	44.50	25.87	-	-	-	-2.2%	-1.1%
SBMH	⇒	4.45	4.45	3.16	-	0.66 m	-	-	-1.3%
AFREXIM	⇒	2.80	2.80	4.64	-	-	-	-5.1%	5.7%
ENL	↓	20.80	20.80	9.41	-	-	-1.0%	4.0%	6.7%
CIEL	↓	6.90	6.90	8.96	-	1.23 m	-0.9%	1.8%	5.8%
VIVO	⇒	316.00	316.00	17.63	-	-	-	1.7%	8.1%
ROGERS	⇒	31.00	31.00	8.09	-	-	-	2.8%	4.4%
ASCENCIA	⇒	20.70	20.70	10.05	-	-	-	2.5%	4.0%
PBL	⇒	538.00	538.00	21.21	-	-	-	0.6%	2.5%
DEM Most Active (3-month average)									
LAVASTONE	⇒	1.60	1.60	6.4	0.00 m	-	-	-5.9%	-
MIWA	↑	0.32	0.32	0.0	-	-	10.3%	6.7%	10.3%
ATTITUDE	⇒	11.90	11.90	11.7	-	-	-	7.2%	10.2%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
7-Sep-23	MFDG	DEM	Dividend	Final	0.43	25-Sep-23	14-Oct-23
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

Latest Announcements

Date	Company	Details
30-Aug-23	CMSP (I) Ltd	The Listing Executive Committee of the SEM has given its approval to the listing of up to 1,300,000 Secured 'ENL' Credit-Linked Notes of MUR 1,000 each, to be issued by CM Structured Products (I) Ltd (CMSP1) to the public by way of an Offer for Subscription on the Official Market of SEM. On the first day of trading, scheduled for 27 October 2023, CMSP1 will make available 500 Notes at an indicative price of MUR 1,000 per Note (the indicative price will be adjusted to the nearest tick size as per the Trading Procedures). The Listing Particulars of CMSP1 is available on the website of the SEM (www.stockexchangeofmauritius.com) and at the registered office of MCBSS, situated at 9-15 Sir William Newton Street, Port Louis.
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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For trading please contact:

Telephone: (+230) 202 5850

Email: mcbsb@mcbscm.mu

MCB Stockbrokers Ltd
Sir William Newton St, Port Louis

Website: www.mcbscm.mu