

### IBL steady at Rs44.50

Semdex	↓	2,070.78	Sem-10	↓	372.35	Demex	↑	266.09
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Domestic indices start the week mixed. The **SEMDEX** slips by 2.98 points to finish at 2,070.78 (-0.1%) with market value traded (MVT) amounting to Rs345.8m for a total volume traded (TVT) of 20.2m.

**IBL** closes flat at Rs44.50 on 303.4k units, accounting for 3.9% of total market value traded for the day. FIP amounts to Rs3.4m. The heavy-weight stock has been steady at Rs44.50 over the past four sessions and year-to-date it is down by -13.6%.

Finance: **CIM** gains +1.9% to close at Rs10.80 on 8.6k units. **SBMH** sheds -1.1%, finishing at Rs4.40 on 74.1k units.

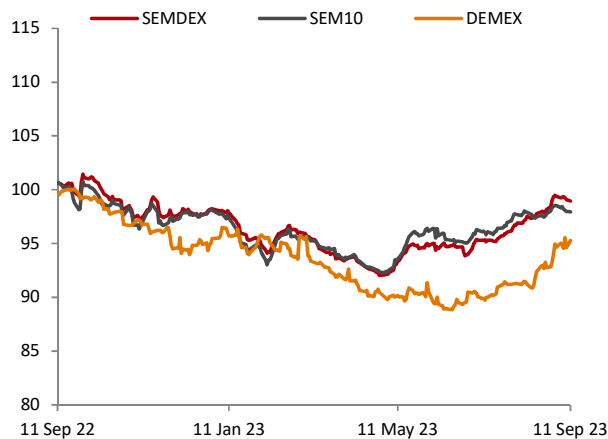
Commerce: **VIVO** edges higher to another all-time high of Rs317.50 (+0.4%) on only 1.2k units.

Leisure & Hotel: **ASL** inches down to Rs70.25 (-1.1%) on 0.2k units, **NMH** edges lower to Rs11.00 (-6.0%) on 149.6k units and **SUN** slips to Rs38.50 (-1.0%) on 20.8k units.

Investments: **CAUDAN** Rs0.54 (+1.9%), **CIEL** Rs6.78 (-0.3%), **MDIT** Rs2.02 (-0.5%), **NIT** Rs19.95 (-0.3%), **POLICY** Rs3.40 (-2.6%), **ROGERS** Rs31.10 (+0.3%).

**GRIT (USD)** closes unchanged at USD0.36 on 18.6m units, making up 92.1% of market value traded for the day.

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



**Foreign Investors (FI)** are net buyers with FIP standing at Rs324.0m compared to FIS of Rs45.5m.

**International equity markets:** US stocks closed Friday's session in the green territory as investors await the release of the inflation print for the month of August. The Street is expecting prices to rise by +3.6% year-over-year. The data will be released on Wednesday. The S&P 500 gained +0.1%, the Dow Jones Industrial Average (^DJI) rose by +0.2%, and NASDAQ inched up by +0.1%. On the other hand, China recorded a CPI of +0.1% y/y in August, after slipping into the deflation territory in July.

Key economic data releasing this week:

US: Consumer Price Index (August), Producer Price Index (August), Retail Sales (August), Empire State Manufacturing Index (September)

EUROPE: Monetary Policy Statement to be released by the European Central Bank

UK: GDP growth month-over-month (August)

### Market Activity

Top gainers		Top losers	
LOTTO	3.4%	NMH.O	-6.0%
CIM	1.9%	POLICY	-2.6%
CAUDAN	1.9%	SBMH	-1.1%
VIVO	0.4%	ASL	-1.1%
ROGERS	0.3%	SUN	-1.0%
Most Active (Value)		Key Market Statistics	
GRIT (USD)	318.3 m	Market Cap (Rs)	260.8 bn
IBLL	13.5 m	Market Cap (USD)	5.8 bn
MCBG	2.8 m	Market Div Yield	3.8%
LOTTO	2.7 m	Market P/E	9.2x
CIEL	1.9 m	FI Participation	0.3x

### Summary Market Data

	Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>					
SEMDEX	↓ 2,070.78	-0.14%	1.5%	4.7%	
SEM-ASI	↓ 1,913.02	-0.1%	1.3%	3.7%	
SEM-VWAP	↓ 1,916.97	-0.03%	1.4%	3.9%	
SEM10	↓ 372.35	-0.07%	0.0%	2.3%	
DEMEX	↑ 266.09	0.7%	4.5%	6.6%	
<b>Global Indices</b>					
Japan: Nikkei 225	↓ 32,606.84	-1.2%	0.7%	3.1%	
US: S&P 500	↑ 4,457.49	0.1%	-0.9%	3.8%	
UK: FTSE 100	↑ 7,478.19	0.5%	-0.65%	-1.6%	
Europe: Euro Stoxx 50	↑ 4,237.19	0.4%	-1.2%	-1.4%	
<b>Emerging Market Indices</b>					
Brazil: IBOVESPA	↓ 115,313.4	-0.6%	-3.2%	-1.5%	
Russia: MICEX	↓ 3,142.88	-0.8%	1.9%	16.0%	
India: SENSEX	↑ 66,598.91	0.5%	1.1%	6.0%	
China: Shanghai Comp	↓ 3,116.72	-0.2%	-4.4%	-3.0%	
South Africa: JSE All Share	↑ 73,652.67	0.6%	-4.1%	-4.4%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↑	90.65	0.8%	2.3%	USDMUR	→	45.60	-	2.6%
Gold	↓	1,919.08	-0.0%	12.4%	EURMUR	↑	49.38	0.1%	9.6%
Platinum	↓	896.60	-1.4%	1.5%	GBPMUR	↑	57.56	0.1%	11.4%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	→	323.00	322.88	8.05	-	1.2 m	-	0.2%	0.9%
IBLL	→	44.50	44.50	25.87	3.38 m	-	-	-2.0%	-1.1%
SBMH	↓	4.40	4.42	3.13	-	-	-1.1%	-2.7%	-1.8%
AFREXIM	→	2.80	2.80	4.64	-	-	-	1.8%	5.7%
ENL	→	20.80	20.80	9.41	-	-	-	2.7%	6.7%
CIEL	↓	6.78	6.78	8.81	-	-	-0.3%	-	4.0%
VIVO	↑	317.50	317.50	17.72	0.006 m	-	0.4%	2.2%	8.6%
ROGERS	→	31.00	31.05	8.12	-	-	-	2.8%	4.4%
ASCENCIA	→	20.70	20.70	10.05	-	-	-	1.0%	3.8%
PBL	→	538.00	538.00	21.21	-	-	-	0.6%	2.5%
<b>DEM Most Active (3-month average)</b>									
MIWA	↑	0.32	0.29	0.0	-	-	10.3%	6.7%	-
SWANLIFE	↑	1,650.00	1600.00	7.0	-	-	3.1%	3.1%	10.0%
EUDCOS	↓	14.95	15.00	6.2	-	-	-0.3%	6.4%	1.0%

#### 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 ( <a href="http://www.stockexchangeofmauritius.com">www.stockexchangeofmauritius.com</a> ) 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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