

### MCBG: Most actively traded for the day

Semdex ↓ 2,136.18      Sem-10 ↓ 394.29      Demex ↓ 257.23

The **SEMDEX** ends this week's session in the red territory at 2,136.18 (-0.2%) with market value traded (MVT) amounting to Rs31.3m for a total volume traded (TVT) of 1.5m.

**Investments:** **CAUDAN** Rs0.45 (-6.3%), **CIEL** Rs7.30 (-1.4%), **MDIT** Rs1.95 (-0.5%), **NIT** Rs11.50 (+4.6%).

**Foreign Investors (FI)** are net buyers with FI Sellers (FIS) of Rs5.8m compared to FI Purchases (FIP) of Rs19.5m.

**MCBG** adds +0.1% to close slightly higher at Rs370.50. The stock declined over the past three sessions, moving further away from its record high of Rs378.75. Value traded for the day amounts to Rs20.8m, accounting for 66.7% of MVT.

**Finance:** **MCBG Pref** slips to Rs10.05 (-2.4%), **MUA** drops to Rs90.00 (-1.1%), **SBMH** maintains the downtrend and closes lower at Rs4.80 (-2.0%)

**Industry:** **GAMMA** rises to Rs36.50 (+0.1%).

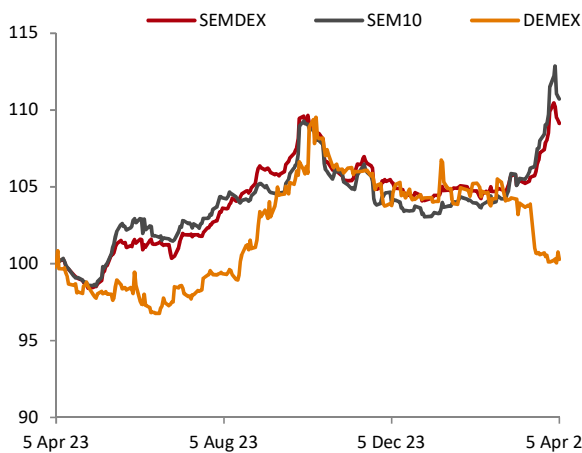
**Leisure & Hotels:** **LOTO** plummets to Rs6.50 (-7.1%), **SUN** closes slightly higher at Rs41.00 (+1.2%).

**AEIB (USD)** inches down to USD2.80 (-0.4%).

**International Equities:** US equities ended yesterday's session lower following a surge in crude oil prices. Brent crude oil hit a five-month high of \$90.65 per barrel over increased tensions in the Middle East. The S&P500 declined by -1.2%, the DJIA fell by -1.4% and the NASDAQ shed -1.4%.

Markets will be watching for the US unemployment figures which will be released later today. Unemployment rate is expected to remain unchanged at 3.9%.

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



### Market Activity

Top gainers		Top losers	
NIT	4.5%	LOTTO	-7.1%
SUN	1.2%	CAUDAN	-6.2%
GAMMA	0.1%	MCBGPREF	-2.4%
MCBG	0.1%	SBMH	-2.0%
		CIEL	-1.4%
Most Active (Value)		Key Market Statistics	
MCBG	20.8 m	Market Cap (Rs)	270.2 bn
SBMH	4.5 m	Market Cap (USD)	5.8 bn
NIT	1.1 m	Market Div Yield	4.1%
AFREXIM	1.0 m	Market P/E	6.7x
ABCB.D0163	1.0 m	FI Participation	40.5%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↓	2,136.18	-0.2%	3.81%	4.5%	
SEM-ASI	↓	1,959.78	-0.15%	3.3%	4.2%	
SEM-VVAP	↓	1,959.45	-0.1%	3.1%	4.2%	
SEM10	↓	394.29	-0.1%	5.4%	7.2%	
DEMEX	↓	257.23	-0.5%	-3.8%	-3.6%	
<b>Global Indices</b>						
Japan: Nikkei 225	↑	39,773.14	0.81%	-0.8%	19.5%	
US: S&P 500	↓	5,147.21	-1.2%	0.3%	9.8%	
UK: FTSE 100	↑	7,975.89	0.5%	4.4%	3.3%	
Europe: Euro Stoxx 50	↑	5,070.76	0.0%	3.2%	13.3%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↑	127,427.5	0.1%	-0.7%	-2.9%	
Russia: MICEX	↑	3,407.57	0.4%	3.4%	8.7%	
India: SENSEX	↑	74,227.63	0.5%	0.5%	3.3%	
China: Shanghai Comp	→	3,069.30	-	1.0%	3.9%	
South Africa: JSE All Share	↑	75,372.98	1.72%	3.8%	1.1%	

Commodities				Currencies				
		Closing	ID Δ	I2M Δ		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	90.65	1.5%	6.7%	USDMUR	46.60	0.1%	1.6%
Gold	↓	2,290.94	-0.4%	13.4%	EURMUR	50.96	-0.06%	1.1%
Platinum	↓	934.78	-0.6%	-8.2%	GBPMUR	59.43	-0.1%	3.4%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	370.50	370.23	6.42	19.1 m	5.3 m	0.1%	9.9%	13.7%
IBLL	→	44.00	43.09	9.78	-	-	-	-	2.0%
SBMH	↓	4.80	4.82	2.87	0.4 m	0.4 m	-2.0%	8.1%	6.0%
AFREXIM	↓	2.80	2.80	3.30	-	-	-0.4%	-0.4%	-1.8%
VIVO	→	350.50	350.50	21.74	-	-	-	0.1%	6.0%
CIEL	↓	7.30	7.30	4.65	-	0.04 m	-1.4%	-	4.9%
SUN	↑	40.50	41.00	4.87	-	-	1.3%	1.5%	6.6%
ROGERS	→	33.10	33.10	5.20	-	-	-	4.3%	5.2%
ASCENCIA	→	18.20	18.20	8.35	-	-	-	-3.2%	-2.9%
PBL	→	500.00	499.71	11.24	-	-	-	0.8%	-0.4%
<b>DEM Most Active (3-month average)</b>									
LFL0	→	17.95	17.95	8.0	0.33 m	-	-	4.7%	2.6%
VELG	→	20.00	20.00	7.1	-	-	-	-5.2%	-11.1%
MIWA	↓	0.30	0.30	7.5	-	-	-6.3%	-9.1%	-11.8%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
25-Mar-24	SBMH	Official	Dividend	Final	0.40	20-May-24	20-Jun-24
25-Mar-24	GAMMA	Official	Dividend	Final	1.50	17-Apr-24	9-May-24
25-Mar-24	ADBF	Official	Dividend	Final	USD 0.29	16-Apr-24	6-May-24
28-Mar-24	MISB	Official	Dividend	Final	USD 0.24	16-Apr-24	6-May-24

#### Latest Announcements

Date	Company	Details
26-Mar-24	ABCB	The offer period for the bonds under the prospectus dated 23 February 2024 closed on 22 March 2024. The offer has been oversubscribed and ABC Banking has decided to fully utilize the permitted oversubscription of MUR 200 million and issue an aggregate nominal amount of MUR 700 million of bonds. As stated in the relevant Applicable Pricing Supplement, the allocation of these bonds will be determined on 26 March 2024.
25-Mar-24	ASTORIA	The Listing Executive Committee of the SEM has given its approval to the listing of 6,062,275 new ordinary shares of Astoria Investments Ltd on the Official Market of the SEM by way of a Consideration Issue.

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