

MCBG snaps 18-day winning streak

Semdex 2,262.57 Sem-10 429.31 Demex 233.11

The **SEMDEX** falls to 2,262.57 (-1.7%). Market Value Traded (MVT) for the day amounts to Rs40.7m, with volume traded of 1.5m.

Foreign investors are net buyers with Foreign Investor Purchases (FIP) of Rs16.3m, compared to Foreign Investor Sales (FIS) of Rs4.6m.

MCBG snaps its 18-day winning streak to close today's session lower at Rs425.00 (-5.4%), wiping out Rs6.1bn in market value. Value traded for the day amounts to Rs22.0m, accounting for 54.0% of MVT.

Finance: CIM inches lower to Rs11.00 (-0.9%), **MCBG Pref** falls to Rs11.15 (-0.5%), **SBMH** moves lower to Rs5.70 (-1.7%).

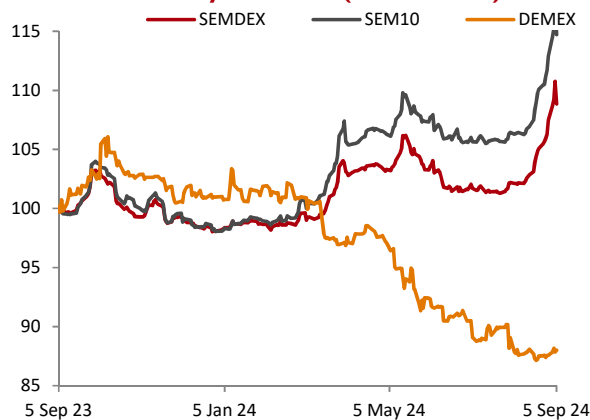
Information, Communication & Technology: EMTEL rises to Rs18.50 (+0.8%).

Commerce: INNODIS retreats to Rs29.00 (-1.0%), **IBL** advances to Rs42.00 (+2.4%), **SHEL** rises to Rs347.00 (+0.1%).

Investments: ALTEO Rs11.20 (+0.5%), **CIEL** Rs8.20 (+0.5%), **ENL** Rs21.15 (+0.2%), **NIT** Rs10.60 (-1.9%), **POLICY** Rs3.07 (-0.3%), **ROGERS** Rs34.00 (+2.6%), **TERRA** Rs20.90 (-0.5%).

Leisure: LOTO adds +1.2% to close at Rs5.30, **SUN** hits new 52-week high of Rs51.50 (+3.0%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
SUN	3.0%	MCBG	-5.3%
ROGERS	2.6%	NIT	-1.9%
IBLL	2.4%	SBMH	-1.7%
LOTTO	1.1%	ASCENCIA	-1.2%
EMTEL	0.8%	INNODIS	-1.0%
Most Active (Value)		Key Market Statistics	
MCBG	22.0 m	Market Cap (Rs)	298.6 bn
MEDINE	4.3 m	Market Cap (USD)	6.5 bn
SBMH	2.7 m	Market Div Yield	4.3%
ENL	2.3 m	Market P/E	7.2x
AFREXIM	1.9 m	FI Participation	25.6%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX		2,262.57	-1.7%	6.59%	5.0%	
SEM-ASI		2,044.62	-1.62%	5.4%	4.1%	
SEM-VWAP		2,051.13	-1.4%	5.6%	4.4%	
SEM10		429.31	-2.4%	7.9%	6.5%	
DEMEX		233.11	0.2%	0.2%	-4.1%	
Global Indices						
Japan: Nikkei 225		37,047.61	-4.2%	3.2%	-4.6%	
US: S&P 500		5,520.07	-0.2%	3.2%	4.3%	
UK: FTSE 100		8,269.60	-0.3%	1.2%	0.5%	
Europe: Euro Stoxx 50		4,848.18	-1.3%	4.5%	-2.1%	
Emerging Market Indices						
Brazil: IBOVESPA		136,004.0	-0.1%	7.8%	11.4%	
Russia: MICEX		2,649.96	1.8%	-10.1%	-19.3%	
India: SENSEX		82,365.77	0.0%	1.1%	11.5%	
China: Shanghai Comp		2,842.21	2.1%	-1.3%	-8.1%	
South Africa: JSE All Share		83,749.86	2.2%	3.1%	8.5%	

Commodities					Currencies				
		Closing	ID Δ	12M Δ			Closing	ID Δ	12M Δ
Oil (Brent)	↓	72.70	-1.4%	-18.3%	USDMUR	↓	46.48	-0.2%	0.8%
Gold	↑	2,495.72	0.1%	28.5%	EURMUR	↑	52.39	0.02%	4.3%
Platinum	↑	909.62	0.1%	-5.0%	GBPMUR	↑	62.17	0.1%	5.8%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	425.00	428.51	7.37	15.8 m	2.6 m	-5.3%	9.8%	11.4%
IBLL	↑	42.00	42.00	9.33	-	-	2.4%	5.0%	-4.7%
SBMH	↓	5.70	5.70	3.41	-	0.1 m	-1.7%	18.8%	26.7%
AFREXIM	⇒	2.71	2.71	3.20	-	1.873 m	-	-4.6%	-4.9%
VIVO	↑	347.00	347.00	21.53	-	-	0.1%	-0.3%	0.3%
CIEL	↑	8.20	8.20	5.22	0.5 m	-	0.5%	9.3%	13.3%
SUN	↑	51.50	51.31	6.12	-	-	3.0%	25.6%	10.6%
ROGERS	↑	34.00	34.00	5.35	-	-	2.6%	3.0%	1.5%
ASCENCIA	↓	17.10	17.12	7.84	-	-	-1.2%	-7.3%	-1.7%
PBL	⇒	501.00	501.50	11.26	-	-	-	1.2%	2.1%
DEM Most Active (3-month average)									
SEMARIS	↑	0.70	0.70	0.0	-	-	1.4%	9.4%	40.0%
LAVASTONE	↓	1.40	1.40	5.0	0.02 m	0.00 m	-3.4%	12.9%	18.6%
UTIN	↑	4.76	4.74	3.9	-	0.02 m	19.6%	34.1%	51.1%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
5-Sep-24	COVIFRA	Official	Dividend	Final	1.10	20-Sep-24	14-Nov-24
9-Aug-24	VIVO	Official	Dividend	Interim	2.34	27-Aug-24	20-Sep-24
1-Aug-24	GAMMA	Official	Dividend	Interim	0.50	19-Aug-24	27-Sep-24
26-Jul-24	LOTO	Official	Dividend	Interim	0.14	12-Aug-24	25-Sep-24

Latest Announcements

Date	Company	Details
28-Aug-24	SBMH	SBM Holdings Ltd, the ultimate holding company of Banque SBM Madagascar SA (BSBMM), wishes to inform its shareholders and the public in general that Mrs. Chirin Dittoo Mahmad – Andriamiarisatrana has been appointed as the Chief Executive Officer of BSBMM effective 19 August 2024.
20-Aug-24	SUN	A Special Meeting of Shareholders of SUN was held on 19 August to approve the Scheme, as ordered by the Supreme Court of Mauritius. The Board is pleased to announce that the resolutions were successfully approved by more than 99% of shareholders present and voting at the Special Meeting. The Scheme shall now be subject to the sanction of the Court following a petition presented to the Court. Shareholders will be apprised of the progress made with regards to the implementation of the Scheme.

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