

### ASCENCIA leads market activity in today's session

Semdex	↓	2,346.52	Sem-I0	↓	437.15	Demex	↑	223.43
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The **SEMDEX** closes slightly lower by 2.95 points to 2,346.52 (-0.1%). Market Value Traded (MVT) for the day amounts to Rs29.0m on a volume of 1.4m shares.

**GRIT (USD)** rises further to USD0.12 (+20.0%) on 2.5k units.

**AFREXIMBANK (USD)** advances to USD2.95 (+3.9%) on 10 units.

Foreigners are net sellers with foreign sales of Rs2.2m compared to foreign purchases of Rs0.3m.

**ASCENCIA** declines by 5.3% to close at Rs18.00 after holding steady at Rs19.00 over the past two sessions. The stock was the most traded for the day, with turnover amounting to Rs9.0m, representing 31% of total market activity. ASCENCIA, which recently joined the SEM-I0 index, ends the session with a market capitalization of Rs8.8bn.

**Finance: MCBG** rises to Rs443.00 (+0.2%).

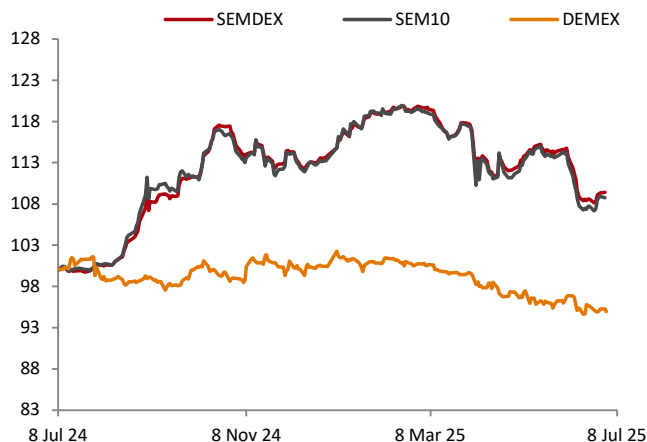
**Commerce: SHEL** advances to Rs435.00 (+0.7%) on 5.1k units.

**Information, Communication & Technology: EMTEL** retreats to Rs20.85 (-0.7%).

**Investments: CIEL** Rs8.50 (+1.2%), **ENL** Rs5.00 (-2.0%), **FINCORP** Rs18.30 (+1.7%), **MEDINE** Rs70.00 (-1.4%), **NIT** Rs9.00 (-1.1%), **PAD** Rs24.05 (+0.2%), **POLICY** Rs3.30 (-1.5%).

**Leisure & Hotels: LOTO** rises to Rs4.00 (+0.3%), **NMH Pref** moves lower to Rs10.50 (-0.5%), **SUN** falls to Rs37.00 (-2.6%).















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



### Market Activity

Top gainers		Top losers	
GRIT (USD)	20.0%	ASCENCIA	-5.3%
AFREXIM	3.9%	MOROIL	-3.3%
FINCORP	1.7%	SUN	-2.6%
CIEL	1.2%	ENL	-2.0%
NEWGOLD	0.9%	POLICY	-1.5%
Most Active (Value)		Key Market Statistics	
ASCENCIA	9.0 m	Market Cap (Rs)	304.0 bn
SUN	4.3 m	Market Cap (USD)	6.7 bn
EMTEL	2.7 m	Market Div Yield	4.7%
MCBG	2.6 m	Market P/E	6.6x
VIVO	2.2 m	FI Participation	4.3%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	↓	2,346.52	-0.1%	-2.2%	-2.1%	
SEM-ASI	↑	2,089.52	0.2%	-1.6%	-0.9%	
SEM-VWAP	↑	2,092.08	0.0%	-1.7%	-0.8%	
SEM-I0	↓	437.15	-0.0%	-2.1%	-2.4%	
DEMEX	↑	223.43	0.1%	-1.9%	-3.6%	
<b>Global Indices</b>						
Japan: Nikkei 225	↓	39,587.68	-0.6%	4.9%	27.1%	
US: S&P 500	↓	6,229.98	-0.8%	3.8%	23.1%	
UK: FTSE 100	↓	8,806.53	-0.2%	-0.4%	14.3%	
Europe: Euro Stoxx 50	↑	5,341.54	1.0%	-1.6%	14.7%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	↓	139,489.7	-1.3%	2.5%	11.1%	
Russia: MICEX	↓	2,756.14	-1.6%	-1.1%	1.0%	
India: SENSEX	↑	83,442.50	0.0%	1.5%	14.1%	
China: Shanghai Comp	↑	3,473.13	0.0%	2.6%	12.2%	
South Africa: JSE All Share	↑	97,363.36	0.2%	1.0%	18.5%	

Commodities		Closing	ID Δ	I2M Δ	Currencies		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	69.58	1.9%	-19.6%	USDMUR	↑	45.56	0.2%	-3.5%
Gold	↓	3,336.50	-0.0%	39.5%	EURMUR	↑	53.77	0.06%	4.0%
Platinum	↓	1,374.95	-1.6%	33.5%	GBPMUR	↑	62.44	0.4%	2.1%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	443.00	442.28	6.96	-	-	0.2%	-3.1%	-0.4%
IBLL	→	30.00	30.00	6.28	-	-	-	-3.2%	-9.0%
SBMH	→	5.68	5.68	3.38	0.1 m	0.1 m	-	-0.4%	-5.6%
EMTEL	↓	20.85	20.86	34.18	-	-	-0.7%	-0.2%	2.2%
PBL	→	621.00	621.00	9.36	-	-	-	0.3%	0.3%
CIEL	↑	8.50	8.50	5.12	-	-	1.2%	-2.1%	-0.2%
CIM	→	15.45	15.45	9.54	-	-	-	-3.1%	-0.6%
ASCENCIA	↓	18.00	18.00	7.38	-	-	-5.3%	2.7%	5.6%
VIVO	↑	435.00	433.04	24.69	-	-	0.7%	1.2%	8.5%
ENL	↓	5.00	5.00	0.89	0.0 m	-	-2.0%	-82.1%	-77.2%
<b>DEM Most Active (3-month average)</b>									
MIWA	→	0.19	0.19	7.6	-	-	-	-13.6%	-5.9%
LAVASTONE	↑	1.31	1.31	5.2	-	-	3.1%	-5.8%	-5.8%
HOTELEST	→	14.00	14.00	5.0	-	-	-	-	-16.4%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
27-Jun-25	AFREXIM	Official	Dividend	Final	USD 0.303	14-Aug-25	29-Aug-25
27-Jun-25	BLL	Official	Dividend	Final	0.02	14-Jul-25	30-Sep-25
27-Jun-25	PAD	Official	Dividend	Interim	0.50	14-Jul-25	28-Jul-25
27-Jun-25	UBP	Official	Dividend	Final	1.75	15-Jul-25	30-Sep-25
27-Jun-25	CIEL	Official	Dividend	Final	0.32	14-Jul-25	30-Jul-25
26-Jun-25	ALTEO	Official	Dividend	Final	0.66	10-Jul-25	28-Jul-25

#### Latest Announcements

Date	Company	Details
27-Jun-25	ENL/ROGERS	Further to the cautionary announcements issued in the context of the proposed restructuring and reorganisation through a scheme of arrangement, the Boards of Directors of ENL Limited, of Rogers and Company Limited and of NewENLRogers Limited have informed shareholders and the public in general that the Supreme Court has, on 27 June 2025, sanctioned the Scheme with an effective date of 30 June 2025.
27-Jun-25	CIEL	The Board of Directors of CIEL have informed its shareholders and the public at large that Mr. P. Arnaud Dalais will retire as Chairman of the Board with effect from 1 July 2025. He will remain a non-executive director of the Company. This transition follows a structured succession process as previously communicated on 8 December 2022 and 7 December 2023. The Board has appointed Mr. Jean-Pierre Dalais as the new Chairman of CIEL, effective from 1 July 2025. Mr. Jean-Pierre Dalais served as Group Chief Executive from 2017 to 2024 and was appointed Vice-Chairman of the Board last year.

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