




ABCB retreats to Rs18.10

Semdex  **2,435.27** **Sem-10**  **455.56** **Demex**  **221.66**

The **SEMDEX** adds 2.79 points to end today's session at 2,435.27 (+0.1%). **Commerce & Industry: H.MALLAC** falls to Rs18.75 (-1.3%), **INNODIS** declines to Rs25.30 (-0.4%), **UBP** rises to Rs73.75 (+1.0%).

Market Value Traded (MVT) for the day amounts to Rs45.5m on a volume of 0.7m shares traded.

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs30.2m compared to FI Purchases (FIP) of Rs0.7m.

ABCB declines by -8.4% to close at a one-month low of Rs18.10. Value traded for the day amounts to Rs1.1m. Its dividend yield and PE currently stand at 5.0% and 5.4x.

Financial Services: MCBG rises further to Rs470.00 (+0.4%), **MCBG Pref** inches lower to Rs10.30 (-1.9%), **SWAN General** advances to Rs382.00 (+0.5%).

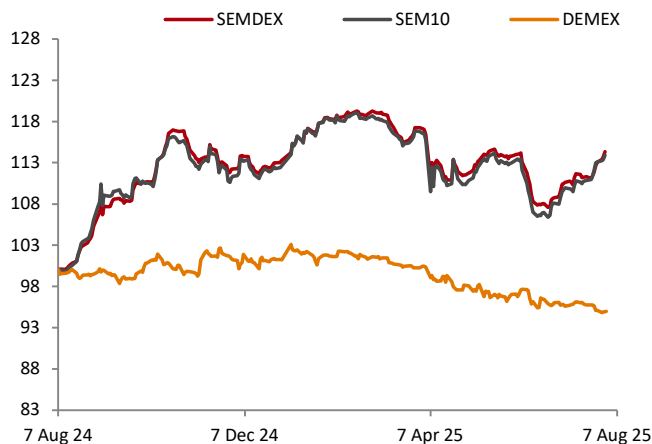
Investments: FINCORP moves lower to Rs21.50 (-0.5%).

Leisure and Hotels: NMH falls to Rs13.75 (-0.4%), **NMH Pref** moves up to Rs10.50 (+1.0%), **LUX** retreats to Rs51.75 (-0.5%)

Property: BHI Class A Pref inches up to Rs891.00 (+0.1%), **BLL** moves up to Rs0.50 (+2.0%).

AFREXIMBANK advances to USD3.05 (+1.7%) on 51 units.





























Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
BLUELIFE	2.0%	ABCH	-8.4%
AFREXIM	1.7%	MCBGPREF	-1.9%
UBP	1.0%	H MALLAC	-1.3%
NMH.P	1.0%	LUX	-0.5%
SWANGEN	0.5%	FINCORP	-0.5%
Most Active (Value)		Key Market Statistics	
MCBG	32.5 m	Market Cap (Rs)	319.8 bn
BHI.P0001	1.8 m	Market Cap (USD)	7.1 bn
PAD	1.7 m	Market Div Yield	4.7%
EATS	1.2 m	Market P/E	6.7x
ABCH	1.1 m	FI Participation	34.1%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX		2,435.27	0.1%	3.7%	1.9%	
SEM-ASI		2,160.77	0.0%	3.6%	2.1%	
SEM-VWAP		2,165.15	0.1%	3.5%	2.3%	
SEM10		455.56	0.2%	4.2%	2.3%	
DEMEX		221.66	0.25%	-0.7%	-2.4%	
Global Indices						
Japan: Nikkei 225		40,794.86	0.6%	2.5%	10.8%	
US: S&P 500		6,345.06	0.7%	1.0%	13.2%	
UK: FTSE 100		9,164.31	0.2%	3.9%	6.6%	
Europe: Euro Stoxx 50		5,263.29	0.3%	-0.5%	-0.4%	
Emerging Market Indices						
Brazil: IBOVESPA		134,537.6	1.0%	-4.8%	0.8%	
Russia: MICEX		2,764.62	-0.8%	-1.3%	-2.1%	
India: SENSEX		80,543.99	-0.2%	-3.5%	-0.1%	
China: Shanghai Comp		3,634.00	0.5%	4.7%	9.6%	
South Africa: JSE All Share		100,152.80	0.5%	3.1%	8.8%	

Commodities		Closing	ID Δ	I2M Δ	Currencies		Closing	ID Δ	I2M Δ
Oil (Brent)	↓	66.89	-1.1%	-12.5%	USDMUR	↓	45.77	-0.7%	-2.2%
Gold	↓	3,369.33	-0.3%	40.9%	EURMUR	↑	53.68	0.1%	3.3%
Platinum	↑	1,337.00	1.1%	46.1%	GBPMUR	↓	61.47	-0.3%	1.50%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-I0									
MCBG	↑	470.00	469.94	7.38	0.0 m	27.9 m	0.4%	6.1%	1.1%
IBLL	→	30.00	30.00	6.28	-	-	-	-	-3.2%
SBMH	→	5.98	5.98	3.56	-	-	-	5.3%	-3.5%
EMTEL	→	20.30	20.30	33.28	-	-	-	-2.6%	-3.3%
PBL	→	630.00	630.00	9.50	0.3 m	-	-	1.4%	-
CIEL	→	9.00	9.00	5.42	-	-	-	5.9%	13.9%
CIM	→	16.00	16.00	9.88	-	-	-	3.6%	10.0%
ASCENCIA	→	18.10	18.10	7.42	-	-	-	0.6%	1.7%
VIVO	→	440.50	440.50	25.00	-	-	-	1.3%	9.8%
ENL	→	5.10	5.10	0.91	-	-	-	2.0%	-82.7%
DEM Most Active (3-month average)									
MIWA	→	0.18	0.18	7.2	-	-	-	-5.3%	-10.0%
ATTITUDE	↑	11.00	11.00	18.0	-	-	0.9%	10.9%	10.0%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
7-Aug-25	KOLOS	Official	Dividend	Interim	4.20	22-Aug-25	30-Sep-25
4-Aug-25	LOTO	Official	Dividend	Interim	0.15	20-Aug-25	30-Sep-25
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

Latest Announcements

Date	Company	Details
7-Aug-25	MEDINE	Medine Limited ('Medine') has appointed Ms. Heba Capdevila as Group Chief Executive Officer, effective October 2025.
31-Jul-25	BHI	Beachcomber Hospitality Investments Ltd has entered into a non-binding letter of intent pertaining to the potential acquisition of one of the leading five-star resorts located in Zanzibar. The Company has been granted a period of exclusivity to conduct due diligence and negotiations and is in the process of appointing advisers in relation to the proposed transaction. Should the latter materialise, the resort would be leased to and operated by New Mauritius Hotels Limited under the Beachcomber brand, in line with the Group's regional expansion strategy.

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