

NMH inches down by 0.7%

Semdex	↓	2,428.09	Sem-10	↑	455.01	Demex	↑	223.38
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The **SEMDEX** inches lower to 2,428.09 (-0.1%). Market Value Traded (MVT) for the day amounts to Rs47.6m on a volume of 1.5m shares traded.

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs24.1m compared to FI Purchases (FIP) of Rs4.2m.

NMH inches down by -0.7% closing at Rs13.65. Its value traded for the day amounts to Rs1.9m, accounting for 4.1% of total market turnover. NMH's market capitalisation currently stands at Rs7.5bn.

Financial Services: MCBG retreats to Rs468.00 (-0.1%), **SBMH** recovers to Rs5.92 (+0.3%).

Commerce & Industry: VIVO edges up to Rs440.75 (+0.1%), **UBP** moves lower to Rs73.00 (-1.0%)

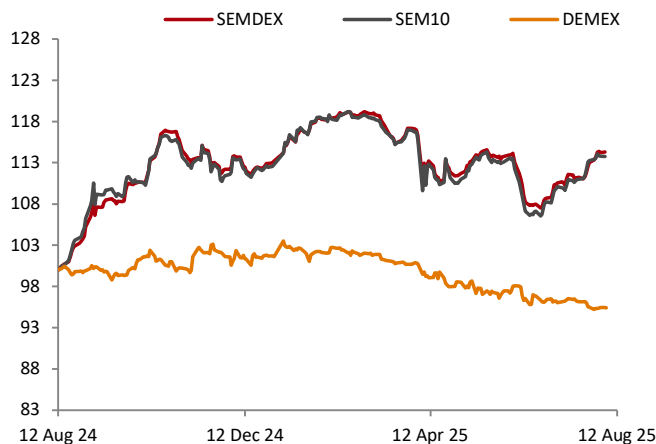
ICT: EMTEL inches up to Rs20.80 (+0.5%)

Investments: BMH Rs29.35 (+1.4%), **ENL** Rs5.40 (+1.1%), **FINCORP** Rs18.00 (-14.3%), **PAD** Rs25.50 (-1.0%).

Leisure and Hotels: LOTTO rises to Rs4.48 (+0.7%)

GRIT (USD) jumps to USD0.13 (+8.3%) on 500 units.















Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
GRIT (USD)	8.3%	FINCORP	-14.3%
BMH	1.4%	UBP	-1.0%
ENL	1.1%	PAD	-1.0%
LOTTO	0.7%	NMH.O	-0.7%
EMTEL	0.5%	NEWGOLD	-0.6%
Most Active (Value)		Key Market Statistics	
MCBG	23.2 m	Market Cap (Rs)	318.9 bn
AFREXIM	7.1 m	Market Cap (USD)	7.0 bn
TERRA	4.9 m	Market Div Yield	4.7%
EATS	4.4 m	Market P/E	6.7x
NMH.O	1.9 m	FI Participation	29.6%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,428.09	-0.1%	2.5%	0.4%	
SEM-ASI	↑	2,160.84	0.1%	2.4%	0.9%	
SEM-VWAP	↓	2,162.13	-0.1%	2.5%	1.0%	
SEM10	↑	455.01	0.0%	3.1%	0.6%	
DEMEX	↑	223.38	0.04%	-0.4%	-1.0%	
Global Indices						
Japan: Nikkei 225	→	41,820.48	-	5.7%	11.5%	
US: S&P 500	↓	6,373.45	-0.3%	1.8%	12.6%	
UK: FTSE 100	↑	9,129.71	0.4%	2.1%	6.7%	
Europe: Euro Stoxx 50	↓	5,331.85	-0.3%	-1.0%	0.4%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	135,623.2	-0.2%	-0.4%	-0.7%	
Russia: MICEX	↑	2,964.15	1.4%	12.2%	4.0%	
India: SENSEX	↑	80,604.08	0.9%	-2.3%	1.4%	
China: Shanghai Comp	↑	3,647.55	0.3%	3.9%	9.1%	
South Africa: JSE All Share	↓	100,630.40	-0.2%	3.5%	9.5%	

Commodities		Closing	ID Δ	I2M Δ	Currencies		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	66.63	0.1%	-16.4%	USDMUR	↑	46.08	0.5%	-1.6%
Gold	↓	3,342.37	-1.6%	37.5%	EURMUR	↑	53.80	0.1%	3.3%
Platinum	↑	1,332.88	0.1%	44.0%	GBPMUR	↑	62.18	0.3%	2.15%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	468.00	468.09	7.35	3.7 m	14.1 m	-0.1%	4.0%	0.7%
IBLL	→	30.00	30.00	6.28	0.0 m	-	-	-	-7.7%
SBMH	↑	5.92	5.90	3.52	0.0 m	-	0.3%	3.9%	-4.5%
EMTEL	↑	20.80	20.71	34.10	-	-	0.5%	-0.2%	1.5%
PBL	→	630.00	630.00	9.50	-	-	-	0.8%	-
CIEL	→	9.00	9.00	5.42	-	-	-	4.7%	13.6%
CIM	→	16.10	16.10	9.94	-	-	-	9.9%	8.4%
ASCENCIA	→	18.10	18.10	7.42	-	-	-	-4.7%	-4.7%
VIVO	↑	440.75	440.75	25.01	0.0 m	-	0.1%	0.9%	9.6%
ENL	↑	5.40	5.39	0.96	-	-	1.1%	10.2%	-81.7%
DEM Most Active (3-month average)									
ATTITUDE	→	11.00	11.00	18.0	-	-	-	4.8%	10.0%
TPL.O	→	3.80	3.80	7.3	-	-	-	-	-5.0%
HOTELEST	→	14.00	14.00	5.0	-	-	-	-	-16.4%

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 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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