

### MCBG hits new all-time high

Semdex ↑ 2,451.60 Sem-10 ↑ 460.17 Demex ↑ 224.76

The **SEMDEX** gains 5.03 points closing at 2,451.60 (+0.2%). Market Value Traded (MVT) for the day amounts to Rs32.9m on a volume of 1.0m shares traded.

**Foreign Investors (FI)** are net sellers with FI Sales (FIS) of Rs6.4m compared to FI Purchases (FIP) of Rs4.1m.

**MCBG** hits new all-time high closing at Rs475.50 (+0.5%). Value traded for the day amounts to Rs17.1m, accounting for 52.0% of total market turnover. At the current price level, its market cap and dividend yield stand at Rs124.4bn and 4.8%, respectively.

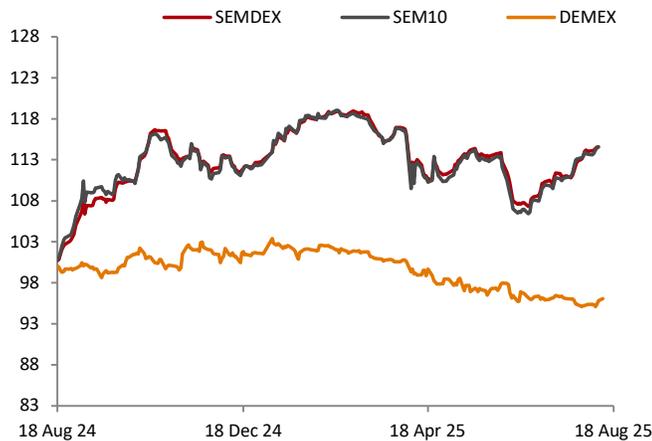
**Commerce & Industry: IBL** declines to Rs29.80 (-0.7%), **GAMMA** rises to 32.30 (+3.2%), **PHONEIX BEV** inches up to Rs632.00 (+0.3%), **UBP** weakens to Rs70.50 (-0.7%)

**Investments: ALTEO** Rs12.45 (-0.4%), **BMH** Rs31.00 (+3.3%), **ERL** Rs24.25 (-1.6%), **FINCORP** Rs21.25 (+1.2%), **MDIT** Rs2.02 (-1.5%), **POLICY** Rs3.64 (+5.8%)

**Leisure and Hotels: ASL** moves up to Rs70.00 (+4.5%), **LOTTO** advances to Rs4.60 (+2.4%), **NMH** inches up to Rs13.75 (+0.4%), **LUX** eases to Rs50.00 (-1.5%), **SUN** edges up to Rs42.10 (+0.2%)

**Property: BLL** rises to Rs0.56 (+12.0%)

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



### Market Activity

Top gainers		Top losers	
BLUELIFE	12.0%	ERL	-1.6%
POLICY	5.8%	LUX	-1.5%
ASL	4.5%	MDIT	-1.5%
BMH	3.3%	MISB	-1.5%
GAMMA	3.2%	UBP	-0.7%
Most Active (Value)		Key Market Statistics	
MCBG	17.1 m	Market Cap (Rs)	322.0 bn
NEWGOLD	4.3 m	Market Cap (USD)	7.1 bn
PBL	1.7 m	Market Div Yield	4.8%
LUX	1.5 m	Market P/E	6.8x
SBMH	1.2 m	FI Participation	15.8%

### Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX	<span style="color: green;">↑</span>	2,451.60	0.2%	3.8%	1.0%	
SEM-ASI	<span style="color: green;">↑</span>	2,171.99	0.1%	2.9%	0.8%	
SEM-VWAP	<span style="color: green;">↑</span>	2,174.66	0.2%	2.8%	1.0%	
SEM10	<span style="color: green;">↑</span>	460.17	0.2%	4.2%	1.5%	
DEMEX	<span style="color: green;">↑</span>	224.76	0.10%	0.6%	-0.3%	
<b>Global Indices</b>						
Japan: Nikkei 225	<span style="color: green;">↑</span>	43,378.31	1.7%	9.3%	14.9%	
US: S&P 500	<span style="color: red;">↓</span>	6,449.80	-0.3%	3.3%	9.0%	
UK: FTSE 100	<span style="color: red;">↓</span>	9,138.90	-0.4%	2.2%	5.9%	
Europe: Euro Stoxx 50	<span style="color: green;">↑</span>	5,448.61	0.3%	1.8%	0.7%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA	<span style="color: red;">↓</span>	136,340.8	-0.0%	0.8%	-2.1%	
Russia: MICEX	<span style="color: orange;">→</span>	3,012.09	-	9.3%	6.1%	
India: SENSEX	<span style="color: green;">↑</span>	80,597.66	0.1%	-2.0%	-0.9%	
China: Shanghai Comp	<span style="color: green;">↑</span>	3,696.77	0.8%	5.5%	9.3%	
South Africa: JSE All Share	<span style="color: red;">↓</span>	101,950.30	-0.0%	5.1%	10.4%	

Commodities					Currencies				
		Closing	ID Δ	I2M Δ			Closing	ID Δ	I2M Δ
Oil (Brent)	↓	65.85	-1.5%	-18.7%	USDMUR	↓	45.91	-0.3%	-1.6%
Gold	↑	3,336.19	0.0%	35.8%	EURMUR	↑	54.00	0.1%	3.5%
Platinum	↓	1,341.55	-1.3%	40.3%	GBPMUR	↓	62.55	-0.2%	2.32%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	475.50	474.90	7.47	3.8 m	2.0 m	0.5%	5.4%	1.9%
IBLL	↓	29.80	29.81	6.23	-	-	-0.7%	-1.3%	-9.1%
SBMH	⇒	6.10	6.10	3.63	-	-	-	9.3%	5.2%
EMTEL	⇒	21.10	21.10	34.59	-	-	-	2.9%	-1.6%
PBL	↑	632.00	632.00	9.53	-	-	0.3%	1.1%	-0.2%
CIEL	⇒	9.00	9.00	5.42	-	-	-	6.1%	13.1%
CIM	⇒	16.15	16.15	9.97	-	-	-	0.9%	3.2%
ASCENCIA	⇒	18.10	18.10	7.42	-	-	-	0.6%	-4.5%
VIVO	⇒	440.75	440.75	25.01	-	-	-	0.6%	9.6%
ENL	⇒	5.50	5.50	0.98	-	-	-	14.6%	-81.3%
<b>DEM Most Active (3-month average)</b>									
EUDCOS	↑	15.00	14.91	11.1	0.04 m	-	0.7%	0.7%	5.3%
PHIN	⇒	425.00	425.00	7.2	4.1 m	-	-	-1.2%	-2.4%
C-CARE	⇒	8.20	8.20	14.4	-	-	-	1.2%	31.4%

#### 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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