

Hotel stocks close in the red territory

Semdex	↓	2,459.64	Sem-10	↓	461.02	Demex	↓	224.56
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The **SEMDEX** inches lower by 1.27 points to close today's session at 2,459.64 (-0.1%). Market Value Traded (MVT) for the day amounts to Rs21.6m on a volume of 0.5m shares traded.

Finance: **MCBG** retreats to Rs475.25 (-0.1%), **SBMH** declines to Rs6.02 (-1.0%).

Foreign Investors (FI) are net buyers with FI Sales (FIS) of Rs0.2m compared to FI Purchases (FIP) of Rs1.5m.

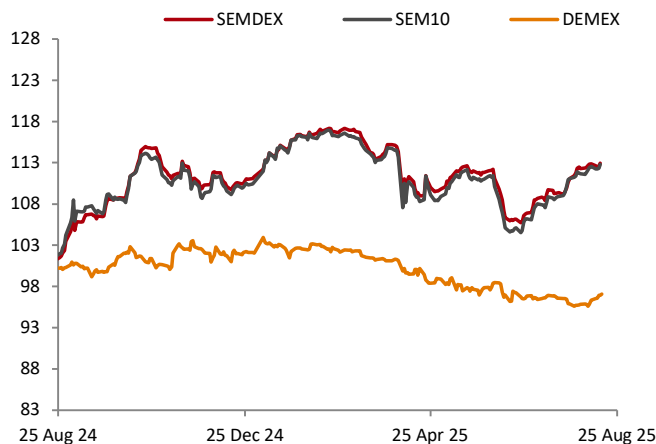
Hotel stocks, namely **NMH**, **LUX** and **SUN** close in the red territory. **NMH** declines to Rs13.65 (-0.4%) on 6k units. **LUX** sheds -2.0% to end the session at Rs50.00, with value traded for the day amounting to Rs2.7m. **SUN** moves lower to Rs42.10 (-0.1%), with its value traded accounting for 17.5% of total market turnover.

Commerce & Industry: **INNODIS** advances to Rs25.40 (+0.4%), **IBL** rises to Rs30.00 (+0.7%), **PBL** adds +0.2% to close at Rs633.00.

Investments: **ALTEO** Rs12.30 (-0.8%), **BMH** Rs33.00 (+3.1%), **CIEL** Rs8.90 (-0.9%), **ENL** Rs7.00 (+4.5%), **ERL** Rs24.90 (+0.8%), **MDIT** Rs2.04 (+2.0%), **MSE** Rs71.50 (+0.4%), **NIT** Rs8.90 (-0.9%), **POLICY** Rs3.60 (-1.1%)

AFREXIMBANK (USD) closes unchanged at USD2.80 with value traded for the day amounting to Rs1.9m.















Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
ENL	4.5%	POLICY	-1.1%
BMH	3.1%	SBMH	-1.0%
MDIT	2.0%	CIEL	-0.9%
ERL	0.8%	NIT	-0.9%
IBLL	0.7%	ALTEO	-0.8%
Most Active (Value)		Key Market Statistics	
MCBG	8.7 m	Market Cap (Rs)	323.0 bn
SUN	3.8 m	Market Cap (USD)	7.1 bn
LUX	2.7 m	Market Div Yield	4.7%
AFREXIM	1.9 m	Market P/E	6.8x
ERL	0.8 m	FI Participation	3.9%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,459.64	-0.1%	2.6%	1.7%	
SEM-ASI	↓	2,178.51	-0.0%	2.1%	1.6%	
SEM-VWAP	↑	2,183.13	0.1%	2.2%	1.8%	
SEM10	↓	461.02	-0.1%	2.4%	2.2%	
DEMEX	↓	224.56	-0.36%	1.3%	-0.6%	
Global Indices						
Japan: Nikkei 225	↓	42,610.17	-0.6%	7.0%	14.2%	
US: S&P 500	↓	6,370.17	-0.4%	1.0%	9.0%	
UK: FTSE 100	↑	9,309.20	0.2%	3.3%	5.9%	
Europe: Euro Stoxx 50	↓	5,462.85	-0.2%	2.2%	0.2%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	134,511.0	-0.1%	0.3%	-2.4%	
Russia: MICEX	↓	2,883.50	-1.9%	1.8%	2.6%	
India: SENSEX	↑	82,000.71	0.2%	-0.2%	0.5%	
China: Shanghai Comp	↑	3,771.10	0.1%	5.9%	11.3%	
South Africa: JSE All Share	↑	101,750.49	0.7%	2.1%	8.9%	

Commodities		Closing	ID Δ	I2M Δ	Currencies		Closing	ID Δ	I2M Δ
Oil (Brent)	↑	67.67	1.2%	-11.0%	USDMUR	↓	45.84	-0.1%	-1.7%
Gold	↓	3,338.71	-0.3%	32.9%	EURMUR	↑	53.90	0.1%	3.3%
Platinum	↑	1,351.00	0.8%	39.9%	GBPMUR	↑	62.53	0.4%	2.42%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	475.25	475.71	7.46	1.3 m	-	-0.3%	1.1%	2.9%
IBLL	↑	30.00	29.95	6.28	-	-	0.7%	0.2%	-7.4%
SBMH	↓	6.02	6.04	3.58	-	-	-1.0%	7.1%	3.4%
EMTEL	↑	21.20	21.20	34.75	-	-	0.2%	6.0%	-0.7%
PBL	↑	633.00	633.00	9.54	-	-	0.2%	1.3%	2.6%
CIEL	↓	8.90	8.93	5.36	-	-	-0.9%	7.2%	3.2%
CIM	→	16.25	16.25	10.03	-	-	-	1.6%	6.6%
ASCENCIA	↑	18.15	18.15	7.44	-	-	0.3%	0.3%	0.6%
VIVO	↓	440.50	440.57	25.00	-	-	-0.1%	0.1%	9.4%
ENL	↑	7.00	7.03	-	0.1 m	0.1 m	16.7%	41.1%	-75.9%
DEM Most Active (3-month average)									
LAVASTONE	↑	1.34	1.33	5.4	-	-	6.3%	7.2%	-7.6%
EUDCOS	→	15.05	15.05	11.2	-	-	-	1.7%	5.6%
C-CARE	↓	8.18	8.18	14.4	-	-	-0.2%	1.0%	20.3%

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
20-Aug-25	UIL	UIL will be withdrawn from the DEM after market close of 20 August 2025
18-Aug-25	CIEL	CIEL has approved a preferential offer of secure bonds for an aggregate nominal amount of up to Rs1.7bn. The bond shall be in the form of sustainability-linked bonds and green bonds.

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