

### MCBG declines further

|        |   |          |        |   |        |       |   |        |
|--------|---|----------|--------|---|--------|-------|---|--------|
| Semdex | ↓ | 2,452.20 | Sem-10 | ↓ | 458.81 | Demex | ↓ | 223.37 |
|--------|---|----------|--------|---|--------|-------|---|--------|

The **SEMDEX** declines further to 2,452.20 (-0.3%). Market Value Traded (MVT) for the day amounts to Rs54.7m on a volume of 0.6m shares traded.

**Foreign Investors (FI)** are net sellers with FI Sales (FIS) of Rs21.8m compared to FI Purchases (FIP) of Rs7.3m.

**MCBG** declines for the third straight session to close at Rs470.00 (-1.1%). Value traded for the day amounts to Rs26.6m, including foreign purchases of Rs4.2m compared to foreign sales of Rs17.9m. At the current price level, its market capitalisation stands at Rs123bn.

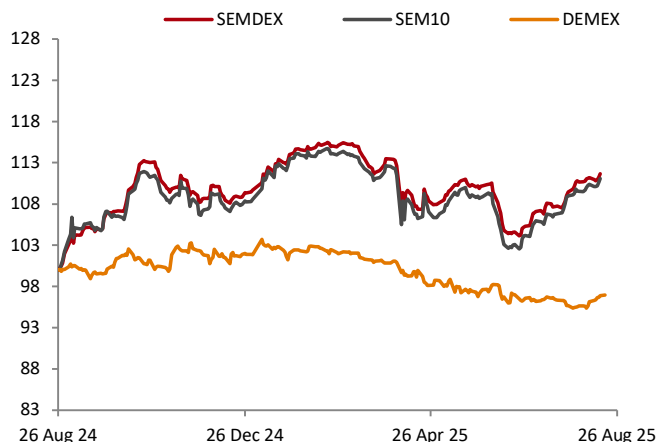
**Finance: SBMH** rises to Rs6.08 (+1.0%).

**Industry: GAMMA** moves lower to Rs32.25 (-0.2%).

**Investments: CIEL** Rs8.94 (+0.5%), **ERL** Rs24.85 (-0.2%), **MDIT** Rs1.89 (-7.4%), **PAD** Rs25.65 (+0.2%), **POLICY** Rs3.74 (+3.9%), **TERRA** Rs20.20 (-0.5%)

**Leisure & Hotels: LOTO** jumps to Rs4.40 (+7.6%), **NMH** inches lower to Rs13.55 (-0.7%), **LUX** advances to Rs51.00 (+2.0%), **RIVEO** rises to Rs20.25 (+1.0%).







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



### Market Activity

| Top gainers         |        | Top losers            |          |
|---------------------|--------|-----------------------|----------|
| LOTTO               | 7.6%   | MDIT                  | -7.4%    |
| ZWTO                | 6.1%   | MCBG                  | -1.1%    |
| ELIT                | 4.9%   | NMH.O                 | -0.7%    |
| POLICY              | 3.9%   | TERRA                 | -0.5%    |
| LUX                 | 2.0%   | ERL                   | -0.2%    |
| Most Active (Value) |        | Key Market Statistics |          |
| MCBG                | 26.6 m | Market Cap (Rs)       | 322.1 bn |
| ADBF                | 16.2 m | Market Cap (USD)      | 7.0 bn   |
| VIVO                | 4.2 m  | Market Div Yield      | 4.7%     |
| EATS                | 3.6 m  | Market P/E            | 6.8x     |
| SBMH                | 1.3 m  | FI Participation      | 26.6%    |

### Summary Market Data

|                                |   | Closing    | ID Δ   | IM Δ | 3 M Δ | 1 year trend  |
|--------------------------------|---|------------|--------|------|-------|---|
| <b>Mauritius</b>               |   |            |        |      |       |   |
| SEMDEX                         | ↓ | 2,452.20   | -0.3%  | 2.3% | 1.7%  |  |
| SEM-ASI                        | ↓ | 2,175.48   | -0.1%  | 2.0% | 1.8%  |  |
| SEM-VWAP                       | ↓ | 2,179.18   | -0.2%  | 2.0% | 2.0%  |  |
| SEM10                          | ↓ | 458.81     | -0.5%  | 1.9% | 2.0%  |  |
| DEMEX                          | ↓ | 223.37     | -0.53% | 0.7% | -1.0% |  |
| <b>Global Indices</b>          |   |            |        |      |       |   |
| Japan: Nikkei 225              | ↑ | 42,807.82  | 0.4%   | 3.3% | 15.2% |  |
| US: S&P 500                    | ↓ | 6,439.32   | -0.4%  | 0.8% | 11.0% |  |
| UK: FTSE 100                   | → | 9,321.40   | -      | 2.2% | 6.1%  |  |
| Europe: Euro Stoxx 50          | ↓ | 5,443.96   | -0.8%  | 1.7% | 2.2%  |  |
| <b>Emerging Market Indices</b> |   |            |        |      |       |   |
| Brazil: IBOVESPA               | ↑ | 138,025.2  | 0.0%   | 3.4% | 0.1%  |  |
| Russia: MICEX                  | ↓ | 2,887.24   | -0.3%  | 4.1% | 4.2%  |  |
| India: SENSEX                  | ↑ | 81,635.91  | 0.4%   | 0.2% | -0.1% |  |
| China: Shanghai Comp           | ↑ | 3,883.56   | 1.5%   | 8.1% | 16.0% |  |
| South Africa: JSE All Share    | ↑ | 102,978.50 | 0.2%   | 4.1% | 10.1% |  |

| Commodities |   | Closing  | ID Δ  | I2M Δ  | Currencies |   | Closing | ID Δ  | I2M Δ |
|-------------|---|----------|-------|--------|------------|---|---------|-------|-------|
| Oil (Brent) | ↑ | 68.80    | 1.6%  | -12.9% | USDMUR     | ↓ | 45.84   | -0.1% | -1.7% |
| Gold        | ↓ | 3,365.89 | -0.2% | 34.0%  | EURMUR     | ↑ | 53.90   | 0.1%  | 3.3%  |
| Platinum    | ↓ | 1,345.99 | -1.1% | 39.4%  | GBPMUR     | ↑ | 62.53   | 0.4%  | 2.42% |

| Selected stocks                          |   | Closing | VWAP   | P/E   | FIP   | FIS     | ID Δ  | IM Δ  | 3M Δ   |
|--|---|---------|--------|-------|-------|---------|-------|-------|--------|
| <b>SEM-10</b>                            |   |         |        |       |       |         |       |       |        |
| MCBG                                     | ↓ | 470.00  | 470.69 | 7.38  | 4.2 m | 17.9 m  | -1.1% | -     | 1.7%   |
| IBLL                                     | → | 30.00   | 29.95  | 6.28  | -     | -       | -     | 0.2%  | -4.8%  |
| SBMH                                     | ↑ | 6.08    | 6.08   | 3.62  | -     | -       | 1.0%  | 8.2%  | 6.7%   |
| EMTEL                                    | → | 21.20   | 21.20  | 34.75 | -     | 0.000 m | -     | 6.0%  | -0.7%  |
| PBL                                      | → | 633.00  | 633.00 | 9.54  | -     | -       | -     | 1.3%  | 2.4%   |
| CIEL                                     | ↑ | 8.94    | 8.96   | 5.39  | -     | -       | 0.4%  | 7.7%  | 3.7%   |
| CIM                                      | → | 16.25   | 16.25  | 10.03 | -     | -       | -     | 1.6%  | 4.8%   |
| ASCENCIA                                 | → | 18.15   | 18.15  | 7.44  | -     | -       | -     | 0.6%  | 0.8%   |
| VIVO                                     | → | 440.50  | 440.50 | 25.00 | -     | -       | -     | 0.1%  | 9.4%   |
| ENL                                      | → | 7.00    | 7.02   | -     | -     | 0.3 m   | -     | 41.1% | -75.9% |
| <b>DEM Most Active (3-month average)</b> |   |         |        |       |       |         |       |       |        |
| MIWA                                     | ↓ | 0.18    | 0.18   | 7.2   | -     | -       | -5.3% | -5.3% | -14.3% |
| EUDCOS                                   | → | 15.05   | 15.05  | 11.2  | 0.1 m | -       | -     | 1.0%  | 5.6%   |
| LFL.O                                    | → | 19.45   | 19.41  | 5.2   | -     | -       | -     | -     | -4.4%  |

#### 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  |
|-----------|---------|--|
| 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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