

SBMH advances to three-month high

Semdex	↓	2,440.37	Sem-10	↓	456.92	Demex	↓	221.78
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The **SEMDEX** moves lower by 2.41 points to close at 2,440.37 (-0.1%). **Commerce & Industry: UBP** closes lower at Rs68.50 (-0.7%), **SHEL** retreats to Rs438.75 (-0.5%).

Market Value Traded (MVT) for the day amounts to Rs62.3m on a volume of 2.8m shares traded.

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs10.1m compared to FI Purchases (FIP) of Rs2.7m.

SBMH adds +0.3% to close today's session at a three-month high of Rs6.14. Its value traded for the day amounts to Rs3.6m, accounting for 5.8% of total market turnover. At the current price level, its market capitalisation and dividend yield stand at Rs18.6bn and 8.1% respectively.

Finance: MCBG Pref falls to Rs10.25 (-0.5%).

ICT: EMTEL inches lower to Rs21.10 (-0.5%), with value traded for the day amounting to Rs33.2m.

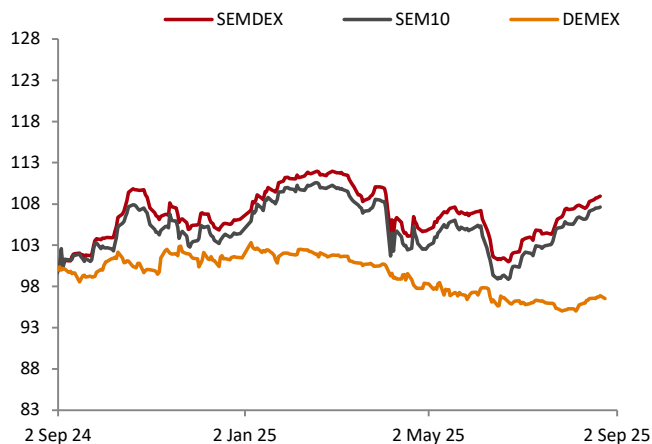
Investments: ALTEO Rs12.15 (-1.2%), **CIEL** Rs8.74 (-0.7%), **ENL** Rs6.36 (-2.2%), **ERL** Rs24.20 (+0.2%), **MDIT** Rs1.90 (-5.0%), **MEDINE** Rs71.25 (-0.7%), **NIT** Rs9.08 (+0.9%), **PAD** Rs25.25 (-0.2%), **POLICY** Rs3.45 (-1.4%).

Leisure & Hotels: LUX adds +1.0% to close at Rs50.50.

Property: ASCENCIA falls further to Rs18.10 (-0.3%), **BLL** declines to Rs0.52 (-1.9%).

Sugar: OMNICANE advances to Rs18.25 (+0.3%).















Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
LUX	1.0%	MDIT	-5.0%
NIT	0.9%	ENL	-2.2%
SBMH	0.3%	BLUELIFE	-1.9%
OMNICANE	0.3%	POLICY	-1.4%
ERL	0.2%	ALTEO	-1.2%
Most Active (Value)		Key Market Statistics	
EMTEL	33.2 m	Market Cap (Rs)	320.5 bn
MCBG	13.9 m	Market Cap (USD)	7.0 bn
SBMH	3.6 m	Market Div Yield	4.7%
VIVO	2.5 m	Market P/E	6.7x
ASCENCIA	1.9 m	FI Participation	10.3%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,440.37	-0.1%	0.7%	0.9%	
SEM-ASI	↓	2,165.81	-0.1%	0.1%	1.4%	
SEM-VWAP	↓	2,170.14	-0.1%	0.0%	1.6%	
SEM10	↓	456.92	-0.1%	0.9%	1.2%	
DEMEX	↓	221.78	-0.19%	0.1%	-2.0%	
Global Indices						
Japan: Nikkei 225	↓	42,188.79	-1.2%	3.4%	11.1%	
US: S&P 500	→	6,460.26	-	3.6%	9.3%	
UK: FTSE 100	↑	9,196.34	0.1%	1.4%	4.8%	
Europe: Euro Stoxx 50	↑	5,367.08	0.3%	3.9%	0.0%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	141,283.0	-0.1%	6.7%	3.1%	
Russia: MICEX	↓	2,886.97	-0.4%	5.8%	2.1%	
India: SENSEX	↑	80,364.49	0.7%	-0.3%	-1.3%	
China: Shanghai Comp	↑	3,875.53	0.5%	8.9%	15.8%	
South Africa: JSE All Share	↑	101,899.00	0.1%	4.3%	8.0%	

Commodities		Closing	ID Δ	12M Δ	Currencies		Closing	ID Δ	12M Δ
Oil (Brent)	↑	68.15	1.0%	-11.4%	USDMUR	↑	46.33	0.2%	-1.5%
Gold	↑	3,476.07	0.8%	38.9%	EURMUR	↑	54.43	0.1%	2.9%
Platinum	↑	1,406.85	2.6%	51.3%	GBPMUR	↑	62.97	0.3%	0.17%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	→	470.25	470.25	7.38	2.1 m	4.3 m	-	1.1%	1.2%
IBLL	→	29.50	29.50	6.17	-	-	-	-1.3%	-4.8%
SBMH	↑	6.14	6.14	3.65	-	1.3 m	0.3%	3.0%	4.8%
EMTEL	↓	21.10	21.10	34.59	0.580 m	-	-0.5%	3.2%	0.7%
PBL	→	633.00	633.00	9.54	-	-	-	1.0%	2.4%
CIEL	↓	8.74	8.74	5.27	-	-	-0.7%	-2.9%	0.7%
CIM	→	16.05	16.05	9.91	-	-	-	0.3%	4.6%
ASCENCIA	↓	18.10	18.10	7.42	-	1.8 m	-0.3%	0.6%	0.8%
VIVO	↓	438.75	438.79	24.90	-	0.0 m	-0.5%	-0.3%	2.0%
ENL	↓	6.36	6.40	-	0.0 m	0.4 m	-2.2%	27.2%	-77.9%
DEM Most Active (3-month average)									
MIWA	→	0.16	0.16	6.4	-	-	-	-11.1%	-27.3%
C-CARE	↓	8.10	8.10	14.2	-	-	-1.2%	-	15.7%
NOVUS	↑	7.80	7.80	9.4	-	-	0.8%	0.8%	-2.5%

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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