

No gainers in sight

Semdex	↓	2,473.16	Sem-10	↓	464.96	Demex	↑	224.34
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The **SEMDEX** halts its recent winning streak, slipping into negative territory to close today's session at 2,473.16 (-0.2%). Market breadth was entirely negative, with no gainers recorded on the Official Market. Market Value Traded (MVT) for the day amounts to Rs101.9m on a volume of 3.2m shares traded.

Investments: **ERL** Rs24.30 (-0.4%), **NIT** Rs9.80 (-2.0%), **POLICY** Rs4.00 (-0.7%).

Leisure & Hotels: **LOTO** closes lower at Rs4.45 (-1.1%), **NMH** declines further to Rs13.55 (-0.4%), **LUX** retreats to Rs50.00 (-1.0%).

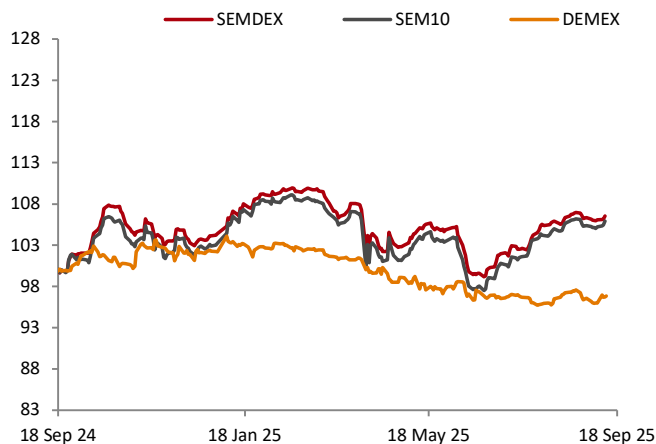
Property: **ASCENCIA** inches lower to Rs19.75 (-0.8%).

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs30.4m compared to FI Purchases (FIP) of Rs18.1m.

Finance: **MCBG** inches lower to Rs468.75 (-0.3%), **SBMH** retreats to Rs6.88 (-0.6%).

Commerce & Industry: **IBL** edges lower to Rs30.10 (-0.2%), **UBP** falls to Rs66.50 (-0.8%).

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
		NIT	-2.0%
		EATS	-1.9%
		LOTTO	-1.1%
		LUX	-1.0%
		ASCENCIA	-0.8%
Most Active (Value)		Key Market Statistics	
MCBG	39.2 m	Market Cap (Rs)	324.8 bn
ERL	14.7 m	Market Cap (USD)	7.2 bn
CIM	10.3 m	Market Div Yield	4.7%
TERRA	7.5 m	Market P/E	6.9x
MUA	7.3 m	FI Participation	0.0%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,473.16	-0.2%	0.9%	8.1%	
SEM-ASI	↓	2,182.92	-0.1%	0.5%	7.0%	
SEM-VWAP	↑	2,188.19	0.0%	0.6%	7.3%	
SEM10	↓	464.96	-0.2%	1.0%	9.6%	
DEMEX	↑	224.34	0.06%	-0.2%	-0.4%	
Global Indices						
Japan: Nikkei 225	↓	44,790.38	-0.2%	3.3%	16.2%	
US: S&P 500	↓	6,600.35	-0.1%	2.3%	10.3%	
UK: FTSE 100	↑	9,208.37	0.1%	0.8%	4.2%	
Europe: Euro Stoxx 50	↓	5,369.70	-0.0%	-1.4%	1.5%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	145,593.6	1.1%	6.8%	4.9%	
Russia: MICEX	↑	2,814.04	0.4%	-5.3%	0.9%	
India: SENSEX	↑	82,693.71	0.4%	2.6%	1.4%	
China: Shanghai Comp	↑	3,876.34	0.4%	4.9%	14.4%	
South Africa: JSE All Share	↑	105,367.90	0.5%	3.4%	11.3%	

Commodities					Currencies				
		Closing	ID Δ	12M Δ			Closing	ID Δ	12M Δ
Oil (Brent)	↓	67.95	-0.8%	-7.8%	USDMUR	↑	45.69	0.5%	0.5%
Gold	↓	3,659.90	-0.8%	42.4%	EURMUR	↑	54.19	0.1%	3.2%
Platinum	↓	1,370.12	-2.1%	39.0%	GBPMUR	↑	62.48	0.3%	0.61%

Selected stocks									
		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
SEM-10									
MCBG	↓	468.75	469.20	7.36	15.0 m	29.0 m	-0.3%	-1.6%	10.5%
IBLL	↓	30.10	30.15	6.30	-	0.0 m	-0.2%	1.0%	0.3%
SBMH	↓	6.88	6.89	4.10	0.0 m	-	-0.6%	12.8%	26.9%
EMTEL	→	23.00	23.00	37.70	-	-	-	9.5%	10.3%
PBL	→	633.00	633.00	9.54	-	-	-	0.2%	1.9%
CIEL	→	8.86	8.86	5.34	-	-	-	-1.6%	4.2%
CIM	→	16.10	16.10	9.94	-	-	-	-0.9%	10.7%
ASCENCIA	↓	19.75	19.75	8.23	-	-	-0.8%	9.9%	7.6%
VIVO	→	440.75	440.75	25.01	-	-	-	-	2.4%
ENL	→	6.00	6.00	-	-	0.0 m	-	9.1%	-79.7%
DEM Most Active (3-month average)									
LAVASTONE	↑	1.28	1.28	5.1	-	-	0.8%	-5.2%	-4.5%
MIWA	→	0.14	0.14	5.6	-	-	-	-26.3%	-36.4%
EUDCOS	→	15.05	15.05	11.2	-	-	-	1.0%	2.7%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
4-Sep-25	MFDG	DEM	Dividend	Final	0.52	01-Oct-25	31-Oct-25
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

Latest Announcements

Date	Company	Details
4-Sep-25	ENL	Following a special meeting, shareholders have resolved that the name of the company be changed to 'Almarys Limited'.
4-Sep-25	ERL	Following a special meeting, shareholders have resolved that the name of the company be changed to 'ER Group Limited'.

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