

### NMH maintains the downtrend

Semdex  2,456.23 Sem-10  460.95 Demex  224.41

The **SEMDEX** inches up by 1.35 points to close at 2,456.23 (+0.1%).  
Market Value Traded (MVT) for the day amounts to Rs84.9m on a volume of 1.7m shares traded.

**Foreign Investors (FI)** are net sellers with FI Sales (FIS) of Rs31.3m compared to FI Purchases (FIP) of Rs10.3m.

**NMH** continues the downtrend as it slips further to Rs13.20 (-1.5%). Its value traded for the day amounts to Rs2.6m accounting for 3.1% of total market turnover. At the current price level, its market capitalisation stands at Rs7.2bn.

**Finance: MCBG** gains +0.3% to close at Rs467.00, **ABCH** moves lower to Rs18.60 (-4.6%).

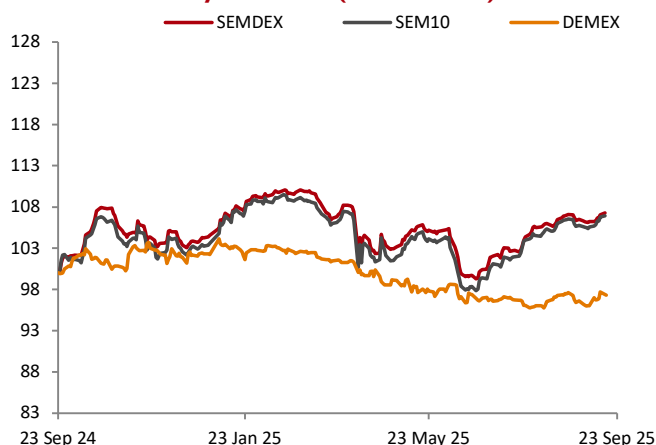
**ICT: EMTel** rises to Rs22.00 (+1.2%) on 0.1k units.

**Investments: CIEL** Rs8.80 (-0.9%), **ERL** Rs24.25 (+0.2%), **MDIT** Rs1.96 (-0.5%).

**Leisure & Hotels: NMH Pref** advances to Rs10.60 (+0.5%).

**Property: BLL** declines to Rs0.49 (-5.8%).





























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



### Market Activity

Top gainers		Top losers	
MISB	1.2%	BLUELIFE	-5.8%
EMTEL	1.1%	ABCH	-4.6%
NEWGOLD	0.8%	NMH.O	-1.5%
NMH.P	0.5%	ADBF	-1.2%
MCBG	0.3%	CIEL	-0.9%
Most Active (Value)		Key Market Statistics	
MCBG	46.7 m	Market Cap (Rs)	322.6 bn
MUA	22.1 m	Market Cap (USD)	7.1 bn
CIEL	2.8 m	Market Div Yield	4.7%
NMH.O	2.6 m	Market P/E	6.8x
CIM	2.2 m	FI Participation	25.0%

### Summary Market Data

		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
<b>Mauritius</b>						
SEMDEX		2,456.23	0.1%	-0.2%	7.6%	
SEM-ASI		2,168.10	-0.0%	-0.7%	6.8%	
SEM-VWAP		2,173.83	-0.1%	-0.5%	7.0%	
SEM10		460.95	0.2%	-0.1%	8.8%	
DEMEX		224.41	0.30%	-0.4%	0.3%	
<b>Global Indices</b>						
Japan: Nikkei 225		45,493.66	1.0%	6.7%	18.5%	
US: S&P 500		6,693.75	0.4%	3.5%	12.2%	
UK: FTSE 100		9,226.68	0.1%	-1.0%	5.2%	
Europe: Euro Stoxx 50		5,441.85	-0.3%	-0.8%	4.0%	
<b>Emerging Market Indices</b>						
Brazil: IBOVESPA		145,109.0	-0.5%	5.2%	5.8%	
Russia: MICEX		2,741.06	-1.9%	-5.4%	-0.4%	
India: SENSEX		82,159.77	-0.6%	1.0%	-0.3%	
China: Shanghai Comp		3,828.58	0.2%	0.1%	13.9%	
South Africa: JSE All Share		105,963.07	-0.1%	3.2%	11.9%	

Commodities		Closing	ID Δ	12M Δ	Currencies		Closing	ID Δ	12M Δ
Oil (Brent)	↓	66.57	-0.2%	-10.6%	USDMUR	↓	45.73	-0.6%	-1.2%
Gold	↑	3,746.36	1.7%	42.9%	EURMUR	↑	54.22	0.0%	3.0%
Platinum	↑	1,422.50	1.0%	45.2%	GBPMUR	↓	62.07	-0.2%	-1.04%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	IM Δ	3M Δ
<b>SEM-10</b>									
MCBG	↑	467.00	466.52	7.33	6.5 m	27.8 m	0.3%	-1.7%	9.4%
IBLL	→	30.10	30.10	6.30	-	-	-	0.3%	0.3%
SBMH	→	6.66	6.64	3.96	-	0.5 m	-	10.6%	22.9%
EMTEL	↑	22.00	22.00	36.07	-	-	1.1%	3.8%	5.0%
PBL	→	633.00	633.00	9.54	-	-	-	-	1.9%
CIEL	↓	8.80	8.86	5.30	-	0.61 m	-0.9%	-1.1%	4.3%
CIM	→	16.10	16.10	9.94	-	-	-	-0.9%	3.9%
ASCENCIA	→	19.05	19.05	7.94	-	-	-	5.0%	3.0%
VIVO	→	441.00	441.00	25.03	-	-	-	0.1%	2.3%
ENL	→	5.96	5.96	-	-	-	-	-14.9%	-79.1%
<b>DEM Most Active (3-month average)</b>									
MIWA	↑	0.14	0.14	5.6	-	-	7.7%	-26.3%	-36.4%
ATTITUDE	→	11.00	11.00	18.0	-	-	-	-	10.0%
PHIN	→	425.00	425.00	7.2	-	-	-	-	-1.1%

#### Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
17-Sep-25	BHI CLASS A	Official	Dividend	Final	34.71	03-Oct-25	22-Oct-25
17-Sep-25	BHI CLASS B	Official	Dividend	Final	EUR 34.71	03-Oct-25	22-Oct-25
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

#### 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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