

Hotel stocks shake off further gains

Semdex ↓ 2,075.79 Sem-10 ↓ 381.66 Demex ↓ 292.51

Hotel stocks stay on the reverse lane as two of the trio post another day in the red. **NMH** drops by another 7.3% to Rs7.60 on 100k shares as **SUN** slips to Rs19.25 (-3.3%). Amongst heavy fallers, **GRIT** also shrinks by 7.3% to USD0.51. **MCBG** contracts to Rs310 (-0.3%) on 202k shares. **ENL** erases 3.3% to Rs22 as **MDIT** falls to Rs3 (-0.7%). **CIEL** inches up to Rs6.80 (+0.3%). On the DEM, with the exception of **ABC Banking** mounting to Rs19.50 (+0.3%). **C-CARE** tumbles to Rs22.20 (-1.3%) and **EUDCOS** to Rs16.10 (-0.9%).

The **SEMDEX** falls to 2,075.79 (-0.3%), with market value traded (MVT) amounting to Rs99.3m for a total volume traded (TVT) of 2.4m

Foreign Investors (FI) are seller with FIS of Rs61.2m and FIP of Rs2.9m.

Commerce: INNODIS increases to Rs51.50 (+1%).

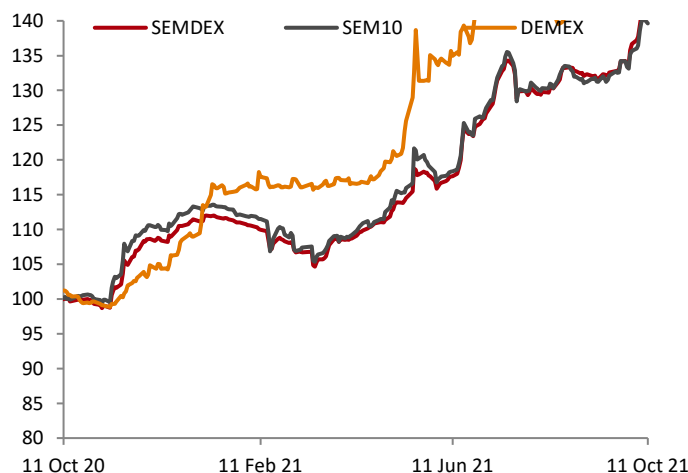
Investments: BMH ascends to Rs25.20 (+0.2%) and POLICY to Rs5.82 (+1%).

PD: BLUELIFE falls to Rs0.57 (-1.7%)

Sugar: OMNICANE recovers to Rs18.05 (+0.3%).

International equity markets: The S&P 500 ended lower on Friday after data showed weaker jobs growth than expected in September, yet investors still expected the FED to begin tapering asset purchases this year.

Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
POLICY	1.0%	NMH.O	-7.3%
INNODIS	1.0%	GRIT (USD)	-7.3%
BMH	0.4%	ADBF	-3.6%
CIEL	0.3%	ENL	-3.3%
OMNICANE	0.3%	SUN	-3.3%
Most Active (Value)		Key Market Statistics	
MCBG	62.9 m	Market Cap (Rs)	265.7 bn
CMDC	13.9 m	Market Cap (USD)	6.2 bn
GAMMA	7.9 m	Market Div Yield	2.9%
SBMH	5.6 m	Market P/E	15.2x
MCB 5Y	2.0 m	FI Participation	32.3%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,075.79	-0.3%	6.1%	5.7%	
SEM-ASI	↓	1,917.57	-0.3%	3.9%	3.6%	
SEM-VWAP	↓	1,920.79	-0.1%	4.1%	3.8%	
SEM10	↓	381.66	-0.6%	5.8%	4.6%	
DEMEX	↓	292.51	-0.4%	4.4%	2.1%	
Global Indices						
Japan: Nikkei 225	↑	28,048.94	1.3%	-7.1%	-0.2%	
US: S&P 500	↓	4,391.34	-0.2%	-2.7%	1.6%	
UK: FTSE 100	↑	7,095.55	0.2%	0.0%	0.9%	
Europe: Euro Stoxx 50	↓	4,073.29	-0.6%	-2.5%	2.0%	
Emerging Market Indices						
Brazil: IBOVESPA	↑	112,833.0	2.0%	-0.5%	-10.0%	
Russia: MICEX	↑	4,238.00	0.2%	5.5%	9.8%	
India: SENSEX	↑	60,135.78	0.8%	3.2%	14.4%	
China: Shanghai Comp	→	3,592.17	-	-2.3%	1.9%	
South Africa: JSE All Share	↑	65,242.61	0.1%	-0.4%	-0.0%	

Commodities		Closing	ID Δ	12M Δ	Currencies		Closing	ID Δ	12M Δ
Oil (Brent)	↑	82.39	0.5%	90.1%	USDMUR	↑	43.05	0.23%	7.1%
Gold	↑	1,756.67	0.1%	-7.2%	EURMUR	↑	49.99	0.4%	24.4%
Platinum	↑	1,026.11	4.8%	19.0%	GBPMUR	↑	58.90	0.4%	12.9%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
SEM-10									
MCBG	↓	310.00	310.11	9.25	2.0 m	59.0 m	-0.3%	5.8%	3.0%
IBLL	→	52.50	52.50	210.00	-	-	-	6.5%	8.8%
SBMH	→	4.14	4.14	10.55	-	2.1 m	-	-5.0%	-39.1%
MUA	→	123.00	123.98	16.99	-	-	-	3.4%	8.4%
ENL	↓	22.00	22.00	-	0.1 m	-	-3.3%	8.4%	-6.4%
CIEL	↑	6.80	6.70	18.38	0.05 m	-	0.3%	28.3%	17.6%
ALTEO	→	30.00	29.85	8.24	-	-	-	8.5%	10.7%
GRIT (USD)	↓	0.51	0.51	-	0.01 m	-	-7.3%	-12.1%	-13.6%
ROGERS	→	26.50	26.92	-	-	-	-	17.8%	6.0%
PBL	→	607.00	607.00	18.74	-	-	-	1.2%	2.0%
DEM Most Active (3-month average)									
ABC Bank	↑	19.50	19.50	12.34	-	-	0.3%	2.9%	21.9%
SEMARIS	→	1.00	1.00	-	-	-	-	2.0%	-9.1%
EUDCOS	↓	16.10	16.10	13.53	-	-	-0.9%	9.9%	11.8%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
17-Jun-21	HWP	DEM	Dividend	Final	0.45	02-Jul-21	29-Oct-21
6-Aug-21	KOLOS	DEM	Dividend	Interim	3.30	23-Aug-21	30-Sep-21
11-Aug-21	GAMMA	Official	Dividend	Interim	0.50	27-Aug-21	30-Sep-21
24-Jun-21	MDIT	Official	Dividend	Final	0.07	16-Sep-21	30-Sep-21

Latest Announcements

Date	Company	Details
6-Oct-21	VELOGIC	The Board of Velogic Holding Company Limited (the "Company" or "VHCL"), a subsidiary of Rogers Group is pleased to announce that it has obtained the approval of the regulatory authorities for the listing of the entire stated capital of the Company, i.e. 93,515,565 ordinary shares of no par value, on the Development & Enterprise Market ("DEM") of The Stock Exchange of Mauritius Ltd. ("SEM") by way of: <ul style="list-style-type: none"> • an introduction of 61,935,359 shares at a price of MUR 25.00 per share; and • an offer for sale of up to 31,580,206 shares at an initial price of MUR 25.00 per share (the "Offer").
28-Sep-21	MCBG	The Board of Directors of MCBG has approved, subject to regulatory approval being obtained, a Scrip Dividend Scheme whereby Ordinary shareholders will have the option of receiving their future dividends, or part of thereof, by way of Ordinary shares of the company. The terms of the Scrip Dividend shall be communicated once requisite regulatory approval has been obtained.

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