

NewENLRogers edges lower

Semdex	↓	2,358.51	Sem-I0	↓	439.85	Demex	↑	224.04
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The **SEMDEX** falls by 8.60 points to close at 2,358.51 (-0.4%). Market Value Traded (MVT) for the day amounts to Rs147.5m on a volume of 2.1m shares.

Foreigners are net sellers with foreign sales of Rs45.1m compared to foreign purchases of Rs36.7m.

NewENLRogers edges lower to close at Rs25.75 (-1.0%), with value traded amounting to Rs27.2m, representing 18.5% of market turnover. Foreign participation remains muted, with purchases of Rs0.026m. Since debuting at an introductory price of Rs41.50 on 9 July 2025, the stock has hovered near Rs26.00. Its market capitalization currently stands at Rs12.4bn.

Finance: MCBG inches lower to Rs450.25 (-0.2%), **SBMH** declines to Rs5.72 (-0.4%).

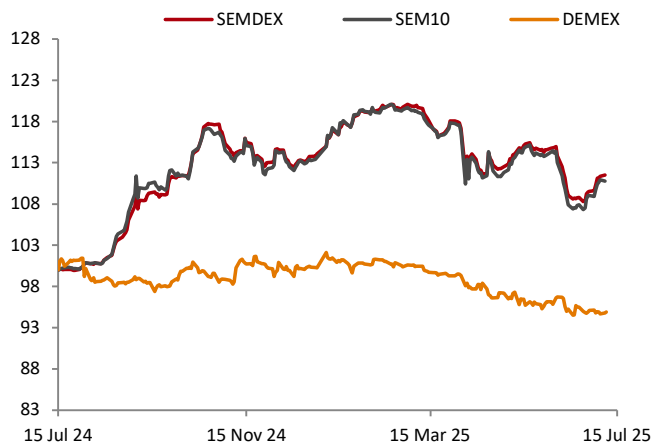
Industry: UBP trades ex-dividend at Rs76.25 (-2.2%).

Investments: CIEL Rs8.48 (-1.4%), **MDIT** Rs2.00 (-4.8%), **NIT** Rs8.30 (+1.2%), **POLICY** Rs3.40 (+1.5%).

Leisure & Hotels: NMH closes lower at Rs13.05 (-6.1%), **NMH Pref** retreats to Rs10.50 (-0.5%).

Sugar: OMNICANE falls to Rs17.70 (-0.6%).















Market Indices: 1 year Trend (Rebased 100)



Market Activity

Top gainers		Top losers	
POLICY	1.5%	NMH.O	-6.1%
NIT	1.2%	MDIT	-4.8%
		UBP	-2.2%
		CIEL	-1.4%
		ERL	-1.0%
Most Active (Value)		Key Market Statistics	
CMSP2	67.1 m	Market Cap (Rs)	309.8 bn
MCBG	43.5 m	Market Cap (USD)	6.8 bn
ERL	27.2 m	Market Div Yield	4.8%
SBMH	1.8 m	Market P/E	6.5x
EATS	1.7 m	FI Participation	27.7%

Summary Market Data

		Closing	ID Δ	IM Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↓	2,358.51	-0.4%	2.7%	-0.5%	
SEM-ASI	↓	2,103.61	-0.3%	2.8%	-0.2%	
SEM-VWAP	↓	2,107.46	-0.3%	2.8%	0.0%	
SEM10	↓	439.85	-0.2%	3.2%	-0.6%	
DEMEX	↑	224.04	0.1%	-0.1%	-3.2%	
Global Indices						
Japan: Nikkei 225	↓	39,459.62	-0.3%	4.3%	16.1%	
US: S&P 500	↑	6,268.56	0.1%	4.9%	16.0%	
UK: FTSE 100	↑	8,998.06	0.6%	1.7%	10.6%	
Europe: Euro Stoxx 50	↓	5,370.85	-0.2%	1.5%	9.4%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	135,299.0	-0.7%	-1.4%	4.5%	
Russia: MICEX	↑	2,714.14	2.7%	-1.3%	-3.7%	
India: SENSEX	↓	82,253.46	-0.3%	1.4%	9.4%	
China: Shanghai Comp	↑	3,519.65	0.3%	4.2%	7.9%	
South Africa: JSE All Share	↓	96,799.66	-0.4%	1.5%	9.1%	

Commodities		Closing	ID Δ	12M Δ	Currencies		Closing	ID Δ	12M Δ
Oil (Brent)	↓	69.21	-1.6%	-18.6%	USDMUR	↑	45.90	0.0%	-2.4%
Gold	↓	3,343.51	-0.4%	38.7%	EURMUR	↑	53.85	0.02%	3.2%
Platinum	↓	1,368.56	-1.0%	36.3%	GBPMUR	↓	61.94	-0.3%	-0.3%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
SEM-10									
MCBG	↓	450.25	450.99	7.07	22.5 m	42.3 m	-0.2%	6.9%	0.4%
IBLL	→	30.00	30.00	6.28	0.2 m	-	-	-	-9.0%
SBMH	↓	5.72	5.73	3.40	0.1 m	0.9 m	-0.3%	0.7%	-6.8%
EMTEL	→	20.55	20.55	33.69	-	-	-	-1.7%	0.2%
PBL	→	625.00	625.00	9.42	-	-	-	0.6%	0.8%
CIEL	↓	8.48	8.28	5.11	-	-	-1.4%	-1.2%	-0.5%
CIM	→	14.65	14.65	9.04	-	-	-	-7.9%	-3.9%
ASCENCIA	→	18.00	18.00	7.38	-	-	-	-2.7%	-0.6%
VIVO	→	438.00	438.00	24.86	-	-	-	1.8%	9.4%
ENL	→	4.80	4.83	0.86	-	-	-	-82.2%	-79.0%
DEM Most Active (3-month average)									
MIWA	→	0.19	0.19	7.6	-	1.83 m	-	-13.6%	0.7%
LAVASTONE	↑	1.31	1.31	5.2	-	-	0.8%	-	-9.7%
PHIN	→	430.25	430.25	7.3	-	-	-	0.1%	-1.1%

Latest Upcoming Entitlements

Ann. Date	Company	Market	Event	Type	Rs/share	Ex date	Payment Date
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
27-Jun-25	CIEL	Official	Dividend	Final	0.32	14-Jul-25	30-Jul-25
26-Jun-25	ALTEO	Official	Dividend	Final	0.66	10-Jul-25	28-Jul-25

Latest Announcements

Date	Company	Details
9-Jul-25	MCBG	The Board of MCBG approved the issuance of 2,110,884 new ordinary shares following scrip dividend elections, employee share option exercises, and preference share conversions. These shares will be listed on the SEM and available for trading as from 10 July 2025. The total number of ordinary shares in issue now stands at 261,534,755.
27-Jun-25	CIEL	The Board of Directors of CIEL have informed its shareholders and the public at large that Mr. P. Arnaud Dalais will retire as Chairman of the Board with effect from 1 July 2025. He will remain a non-executive director of the Company. This transition follows a structured succession process as previously communicated on 8 December 2022 and 7 December 2023. The Board has appointed Mr. Jean-Pierre Dalais as the new Chairman of CIEL, effective from 1 July 2025. Mr. Jean-Pierre Dalais served as Group Chief Executive from 2017 to 2024 and was appointed Vice-Chairman of the Board last year.

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