

SBMH closes at one-month high

Semdex	↑	2,438.08	Sem-10	↑	457.18	Demex	↑	224.17
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The **SEMDEX** gains 7.52 points closing at 2,438.08 (+0.3%). Market Value Traded (MVT) for the day amounts to Rs82.7m on a volume of 6.6m shares traded.

Foreign Investors (FI) are net sellers with FI Sales (FIS) of Rs16.2m compared to FI Purchases (FIP) of Rs3.4m.

SBMH closes at one-month high of Rs6.10 (+3.4%), upon announcement of its half-yearly earnings. Value traded for the day amounts to Rs2.4m, accounting for 2.9% of total market turnover. At the current price level, its market cap and dividend yield stand at Rs18.5bn and 8.2%, respectively.

Financial Services: CIM inches up to Rs16.15 (+0.3%), **MCBG** recovers to Rs470.00 (+0.4%), **MUA** edges up to Rs63.25 (+0.4%)

Commerce & Industry: H. MALLAC rises to Rs19.00 (+1.3%), **IBL** declines to Rs 29.80 (-0.7%), **MOROIL** moves up to Rs16.00 (+1.6%), **PIM** rises to Rs50.00 (+4.2%), **UBP** weakens to Rs71.00 (-2.1%)

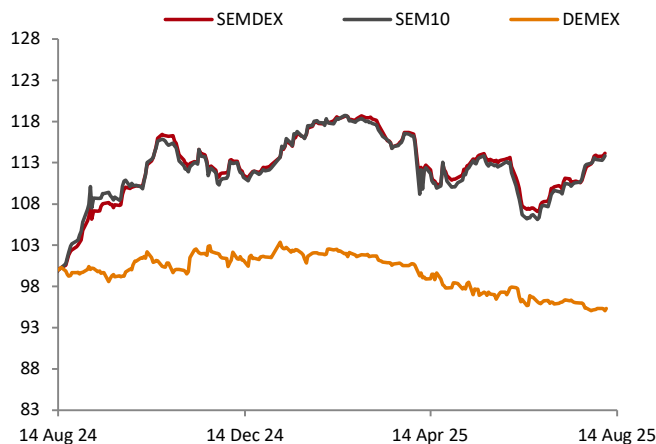
ICT: EMTEL eases to Rs21.00 (-1.2%)

Investments: ALTEO Rs11.90 (-4.8%), **BMH** Rs30.00 (+2.2%), **ENL** Rs5.50 (+0.7%), **ERL** Rs24.80 (-0.4%), **FINCORP** Rs20.75 (+1.2%), **MDIT** Rs2.05 (+2.5%), **MEDINE** Rs71.00 (+1.4%), **NIT** Rs8.90 (+1.8%)

Leisure and Hotels: LOTTO recovers to Rs4.46 (+4.9%), **NMH** inches up to Rs13.70 (+0.4%)















GRIT (USD) moves up to USD0.13 (+18.2%) on 100 units.

AFREXIM trades ex-dividend at USD2.80 (-9.7%)

Market Indices: 1 year Trend (Rebased 100)

Market Activity

Top gainers		Top losers	
GRIT (USD)	18.2%	AFREXIM	-9.7%
LOTTO	4.9%	ALTEO	-4.8%
PIM	4.2%	UBP	-2.1%
SBMH	3.4%	EMTEL	-1.2%
		IBLL	-0.7%
Most Active (Value)		Key Market Statistics	
CIEL	50.0 m	Market Cap (Rs)	320.2 bn
MCBG	15.6 m	Market Cap (USD)	7.1 bn
EMTEL	6.1 m	Market Div Yield	4.7%
SBMH	2.4 m	Market P/E	6.7x
EATS	1.2 m	FI Participation	11.8%

Summary Market Data

		Closing	1D Δ	1M Δ	3 M Δ	1 year trend
Mauritius						
SEMDEX	↑	2,438.08	0.3%	3.0%	0.9%	
SEM-ASI	↑	2,161.37	0.1%	2.4%	0.8%	
SEM-VWAP	↑	2,162.05	0.0%	2.3%	0.8%	
SEM10	↑	457.18	0.4%	3.7%	1.4%	
DEMEX	↑	224.17	0.03%	0.1%	-1.2%	
Global Indices						
Japan: Nikkei 225	↑	43,274.67	1.3%	9.4%	13.3%	
US: S&P 500	↑	6,466.58	0.3%	3.3%	9.9%	
UK: FTSE 100	↑	9,165.23	0.2%	2.5%	6.5%	
Europe: Euro Stoxx 50	↑	5,388.25	1.0%	0.1%	-0.5%	
Emerging Market Indices						
Brazil: IBOVESPA	↓	136,687.3	-0.9%	0.4%	-1.6%	
Russia: MICEX	↓	2,973.02	-0.1%	12.5%	1.3%	
India: SENSEX	↑	80,539.91	0.4%	-2.4%	-0.7%	
China: Shanghai Comp	↑	3,683.47	0.5%	4.9%	9.1%	
South Africa: JSE All Share	↑	102,278.40	1.0%	5.2%	10.4%	

Commodities		Closing	ID Δ	12M Δ	Currencies		Closing	ID Δ	12M Δ
Oil (Brent)	↓	65.63	-0.7%	-18.7%	USDMUR	↓	45.84	-0.1%	-1.7%
Gold	↑	3,355.86	0.2%	36.1%	EURMUR	↑	53.90	0.1%	3.3%
Platinum	↑	1,343.27	0.0%	42.7%	GBPMUR	↑	62.53	0.4%	2.42%

Selected stocks		Closing	VWAP	P/E	FIP	FIS	ID Δ	1M Δ	3M Δ
SEM-10									
MCBG	↑	470.00	468.97	7.38	2.8 m	7.6 m	0.4%	4.4%	1.0%
IBLL	↓	29.80	29.93	6.23	0.1 m	-	-0.7%	-0.7%	-9.1%
SBMH	↑	6.10	6.08	3.63	0.4 m	-	3.4%	6.6%	-1.9%
EMTEL	↓	21.00	21.00	34.43	-	-	-1.2%	2.2%	-2.1%
PBL	→	630.00	630.00	9.50	-	-	-	0.8%	-0.2%
CIEL	→	9.00	9.00	5.42	-	6.49 m	-	6.1%	13.4%
CIM	↑	16.15	16.10	9.97	-	0.1 m	0.3%	9.9%	3.2%
ASCENCIA	→	18.10	18.10	7.42	-	-	-	0.6%	-4.5%
VIVO	→	440.75	440.75	25.01	-	-	-	0.6%	9.6%
ENL	↑	5.50	5.48	0.98	-	-	0.7%	14.6%	-81.5%
DEM Most Active (3-month average)									
LFL.O	→	19.45	19.45	5.2	-	-	-	-1.5%	-2.8%
EUDCOS	→	14.90	14.90	11.0	-	-	-	0.7%	4.6%

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
7-Aug-25	MEDINE	Medine has appointed Ms. Heba Capdevila as Group Chief Executive Officer, effective October 2025.
31-Jul-25	BHI	Beachcomber Hospitality Investments Ltd has entered into a non-binding letter of intent pertaining to the potential acquisition of one of the leading five-star resorts located in Zanzibar. The Company has been granted a period of exclusivity to conduct due diligence and negotiations and is in the process of appointing advisers in relation to the proposed transaction. Should the latter materialise, the resort would be leased to and operated by New Mauritius Hotels Limited under the Beachcomber brand, in line with the Group's regional expansion strategy.

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