

Morning Mantra

MARKET PREVIEW FROM SHAH INVESTOR'S HOME LIMITED'S VIEW

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Table of Contents

Page No.	Particulars
1	Market Commentary
2	Market Summary and Numbers that matter
3	G-Sec Yields, Currency Futures, Dollar Index, Key Commodities Tracker & Index Trend Analysis
4	Nifty Technical
5	Nifty Futures
6	Bank Nifty Futures
7	Nifty Options
8	Disclaimer

MARKET COMMENTARY

Gaining rally continued over the Dalal-Street on 1st day of 2021, with both Sensex and Nifty ending higher with notable gains. After a positive start, key indices remained higher for the whole trading session, taking support with NITI Aayog Vice-Chairman Rajiv Kumar stating that India's economy will grow at 10 per cent in real terms and by the end of next year it will reach pre-COVID-19 level. Talking about the farmers' protest against the three agriculture laws, the NITI Aayog Vice Chairman said the government is trying its best to get their understanding and that they are not misguided and their doubts are cleared.

Domestic sentiments remained positive during trading session, as the RBI announced it will conduct simultaneous purchase and sale of government securities under Open Market Operations (OMO) for Rs 10,000 crore each on January 7, 2021. The decision was taken after a review of current liquidity and financial conditions. Some relief also came with reports that retail inflation for industrial workers eased to 5.27 per cent in November compared to 5.91 per cent in October, mainly due to lower prices of certain food items.

Firm trade continued over the Dalal-Street, with the Department for Promotion of Industry and Internal Trade (DPIIT) in its latest data indicating that foreign direct investment (FDI) equity inflows into India increased by 21 percent to \$35.33 billion during April-October period of FY21. In the year-ago period, FDI equity inflows stood at \$29.31 billion. Besides, the Reserve Bank of India (RBI) has decided to conduct simultaneous purchase and sale of government securities under Open Market Operations (OMO) for an aggregate amount of Rs 10,000 crore each on January 07, 2021.

On the global front, most of the Asian markets and the European markets are closed on Friday on account of the New Year holiday. Back home, the coal sector was in focus, after the government said the current domestic production is unable to meet the country's demand, even though the country is the world's second-largest producer of fossil fuel and the fifth-largest nation in terms of coal deposits.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	47868.98	117.65	0.25
NIFTY	14018.50	36.75	0.26
MIDCAP	18164.48	223.05	1.24
SMLCAP	18261.03	162.92	0.90
BSEFMC	12695.91	86.95	0.69
AUTO	20985.85	174.36	0.84
POWER	2076.06	13.93	0.68
REALTY	2501.08	22.94	0.93
BSE IT	24470.78	222.52	0.92
BANKEK	35798.50	-89.92	-0.25
OIL GAS	14140.03	49.96	0.35
METAL	11606.63	7.22	0.06
INDIA VIX	19.55	-1.54	-7.30

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1314	588	90
BSE	2044	967	159

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3015	3955	(24)
NSE CASH	41732	55074	(24)
NSE F&O	983042	5782891	(83)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	38.55	3.97	1.13
SENSEX	33.50	3.27	0.83

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	2505.67	2436.27	69.40
FII	1072.54	566.33	506.21

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	1344.31	1609.21	(265)
Index Options	93792.23	92290.07	1502
Stock Futures	4305.37	3781.56	524
Stock Options	3538.79	3844.63	(306)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.37	1.45
BANK NIFTY	0.90	1.08

SECURITIES BAN FOR TRADE IN F&O FOR 04-01-2021

NA

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.901	5.894	0.12
USA	0.917	0.912	0.49

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.92	89.68	0.27

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
29-Dec-2020 USD-INR	73.29	0.02	0.03
29-Dec-2020 EUR-INR	89.21	-0.58	-0.64
29-Dec-2020 GBP-INR	99.88	0.08	0.08
29-Dec-2020 JPY-INR	70.80	-0.15	-0.21

KEY COMMODITIES TRACKER

Commodity	Close	Chg Point	% Chg
Gold	1894.76	-0.25	-0.01
Silver	26.33	0.00	0.00
Crude-Oil	48.48	0.08	0.17
Brent-Crude	51.72	0.09	0.17

INDEX TREND ANALYSIS

INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14018.50	13961.40	13989.95	14019.90	14048.45	14078.40	Buy	Buy	Buy
SENSEX	47868.98	47664.29	47766.63	47873.50	47975.84	48082.71	Buy	Buy	Buy
NIFTY FUTURES	14050.50	13963.60	14007.05	14040.50	14083.95	14117.40	Buy	Buy	Buy
BANK NIFTY	31225.85	31070.05	31147.95	31266.15	31344.05	31462.25	Buy	Buy	Neutral
CNX IT	24456.10	24203.50	24329.80	24415.25	24541.55	24627	Buy	Buy	Buy
CNX MIDCAP	21090.95	20800.65	20945.80	21034.80	21179.95	21268.95	Buy	Buy	Neutral
CNX SMALLCAP	7169.75	7075.18	7122.47	7156.63	7203.92	7238.08	Buy	Buy	Neutral

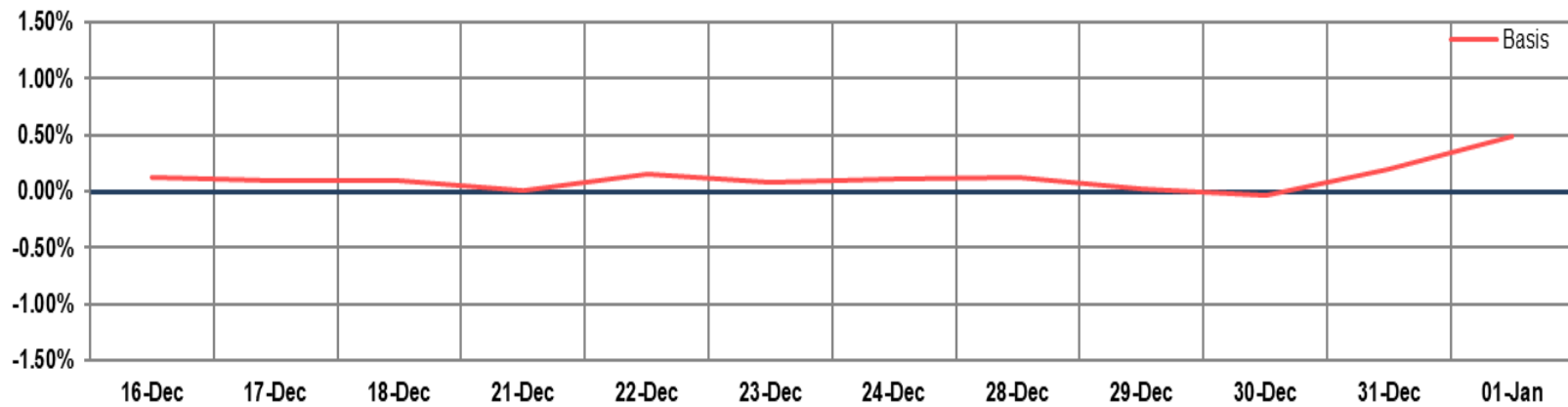
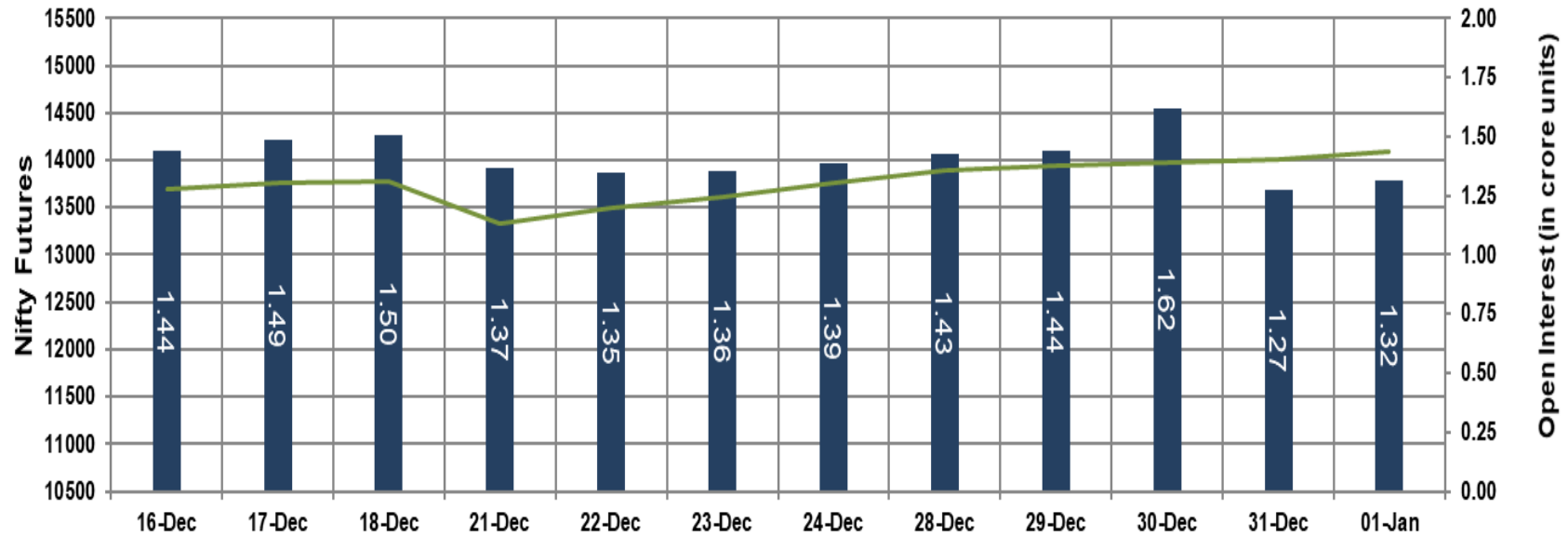
NIFTY TECHNICAL & INDICES LEVEL



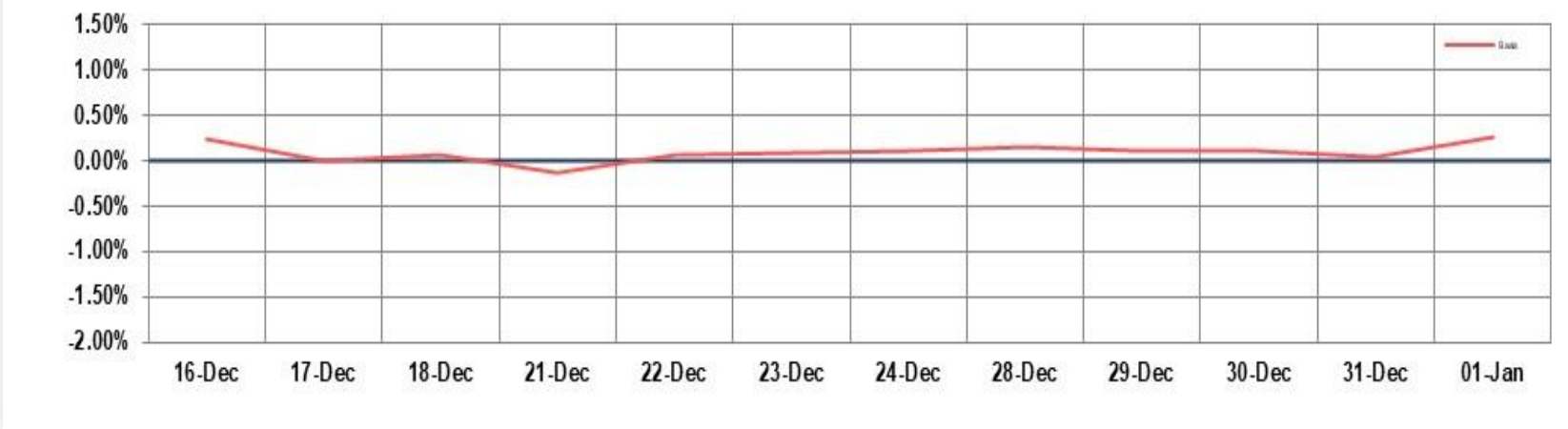
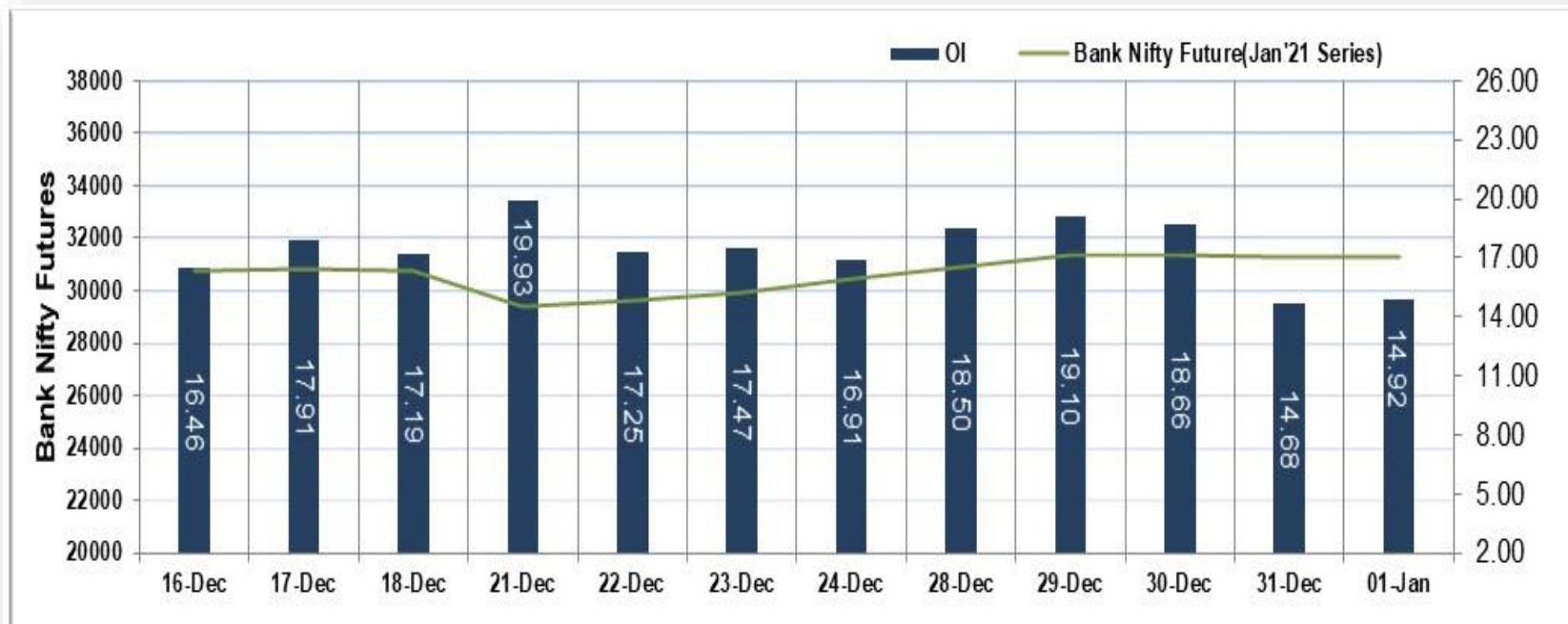
➤ Nifty Cash prices have settled at 14018.50 up by 0.26 percent from the previous close. On the upper side it has resistance of **14160** and **14280** levels, while lower side it has support of **13970** and **13860** levels. Intraday traders should be cautious and take position accordingly.



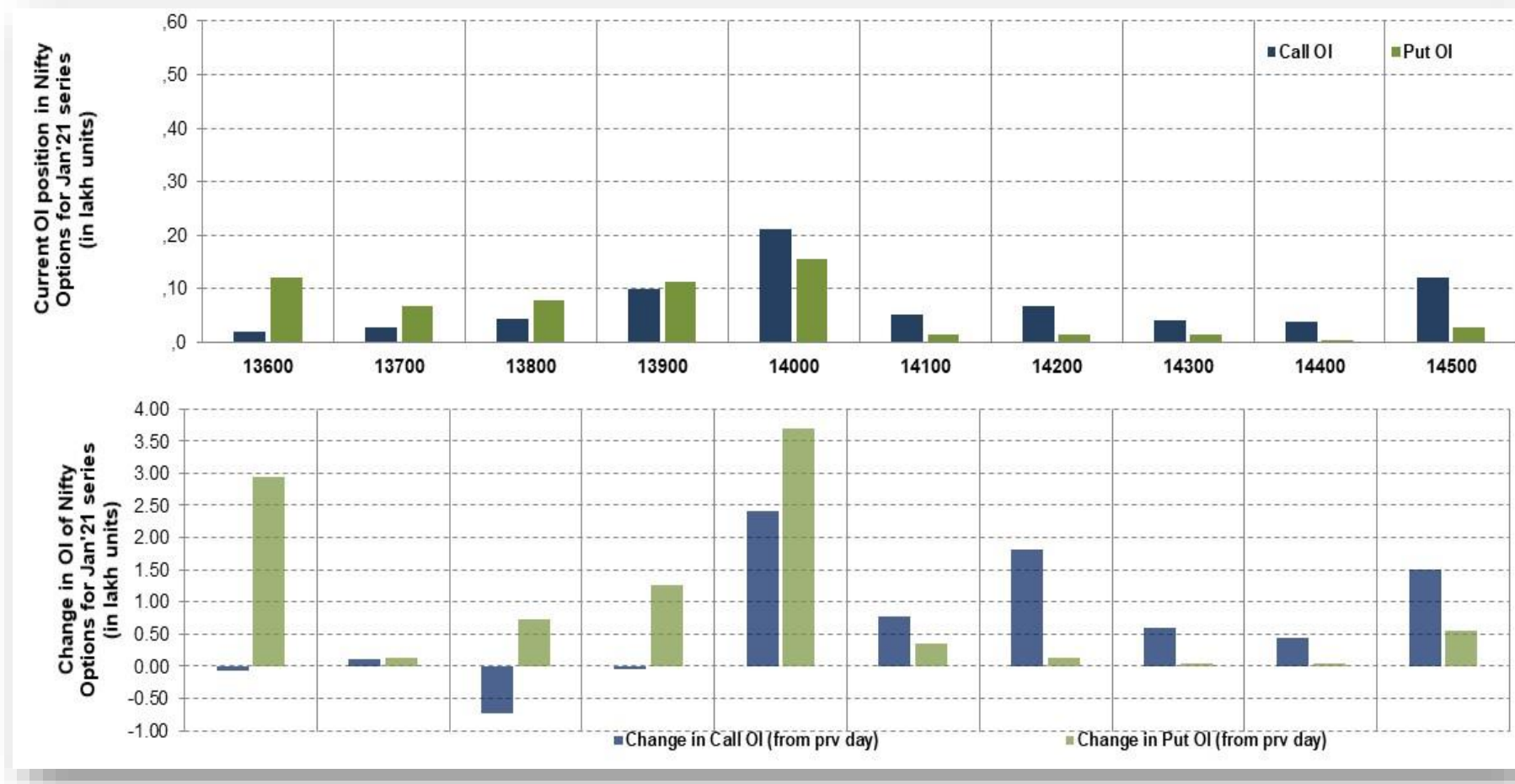
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,000 SP from the Jan month expiry was the most active call with an addition of 0.24 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.37 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (2.10mn) and that for Puts was at 13,500 SP (1.56mn)

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