

Morning Mantra

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

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MARKET COMMENTARY

Bulls held tight grip over the Dalal Street on Monday's trading session, with both the Sensex and the Nifty ending higher with strong gains. The start of the day was on a positive note, after the Drug Controller General of India (DCGI) approved the emergency use of both Oxford-AstraZeneca's Covishield and Bharat Biotech's Covaxin for immunisation against Covid-19 in India. Traders took some support with data showing that goods and Services Tax (GST) collections touched a record-high of over Rs 1.15 lakh crore in December 2020, in signs that the economy continues to reflate after a strict lockdown. Mop-up from GST in December 2020 was 12 percent higher than Rs 1.03 lakh crore collected in the same month of 2019.

In late morning deals, markets cut gains but soon staged recovery to continue gaining rally, as India's manufacturing sector continued to strengthen in December with companies stepping up production and input buying amid efforts to rebuild their inventories following pandemic-driven business closures earlier in 2020. Data released by analytics firm IHS Markit showed Purchasing Managers' Index (PMI) for manufacturing sector picked up marginally in December to 56.4 from 56.3 a month ago. A figure above 50 indicates expansion, while sub-50 signals contraction. Some support also came in as foreign portfolio investors (FPIs) remained net buyers for the third month in a row by investing Rs 68,558 crore in December in Indian markets as global investors continued betting on emerging markets.

On the global front, European markets were trading higher as a landmark Brexit trade deal and coronavirus vaccine drives across the continent bolstered expectations of a strong economic rebound. Asian markets ended mostly higher on Monday, after the manufacturing sector in Japan improved in December to a level of stability, the latest survey from Jibun Bank showed on Monday with a manufacturing PMI score of 50.0. That's up from 49.0 in November and it now sits right on the line that separates expansion from contraction. Individually, output stabilized for the first time in 23 months and employment rose for the first time since February.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48176.80	307.82	0.64
NIFTY	14132.90	114.40	0.82
MIDCAP	18421.52	257.04	1.42
SMLCAP	18510.83	249.80	1.37
BSEFMC	12789.94	94.03	0.74
AUTO	21304.48	318.63	1.52
POWER	2091.33	15.27	0.74
REALTY	2506.84	5.76	0.23
BSE IT	25133.73	662.95	2.71
BANEX	35745.18	-53.32	-0.15
OIL GAS	14416.58	276.55	1.96
METAL	12226.52	619.89	5.34
INDIA VIX	20.03	0.47	2.40

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1376	608	90
BSE	2044	967	159

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4402	3015	46
NSE CASH	63622	41732	52
NSE F&O	2411221	983042	145

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	38.87	4.01	1.12
SENSEX	33.68	3.29	0.82

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4576	5291	(715)
FII	5331	3488	1843

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4443.59	3500.89	943
Index Options	286360.12	285553.36	807
Stock Futures	12443.43	11662.23	781
Stock Options	6221.42	6303.86	(82)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.52	1.37
BANK NIFTY	0.73	0.90

SECURITIES BAN FOR TRADE IN F&O FOR 05-01-2021

NA

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.859	5.898	-0.66
USA	0.925	0.912	1.40

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.78	89.93	-0.17

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
29-Dec-2020 USD-INR	73.20	-0.10	-0.14
29-Dec-2020 EUR-INR	89.90	0.22	0.25
29-Dec-2020 GBP-INR	99.99	0.20	0.21
29-Dec-2020 JPY-INR	71.08	0.08	0.12

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1941.28	46.63	2.44
Silver	27.22	0.88	3.30
Crude-Oil	47.66	-0.86	-1.77
Brent-Crude	51.08	-0.74	-1.41

INDEX TREND ANALYSIS

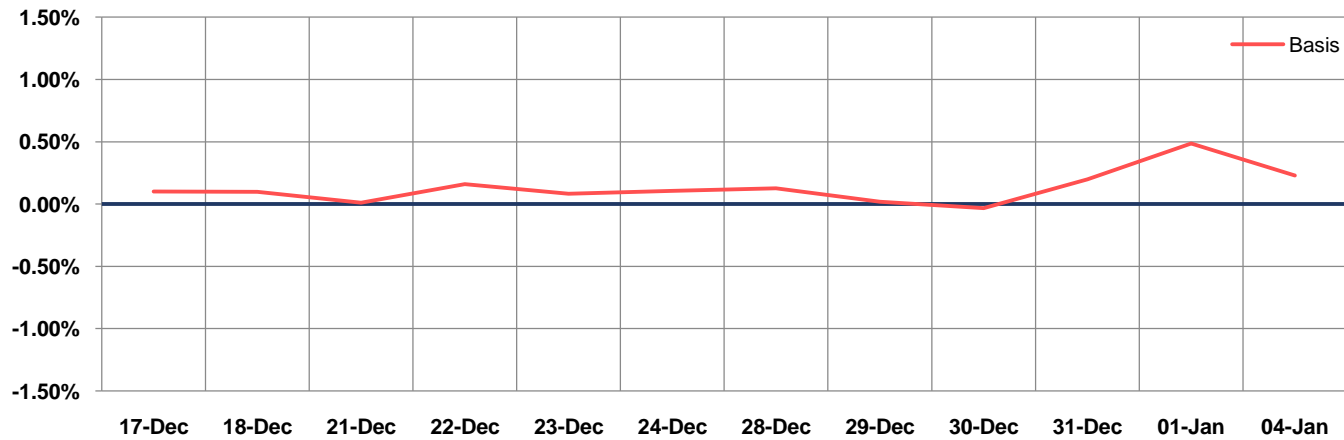
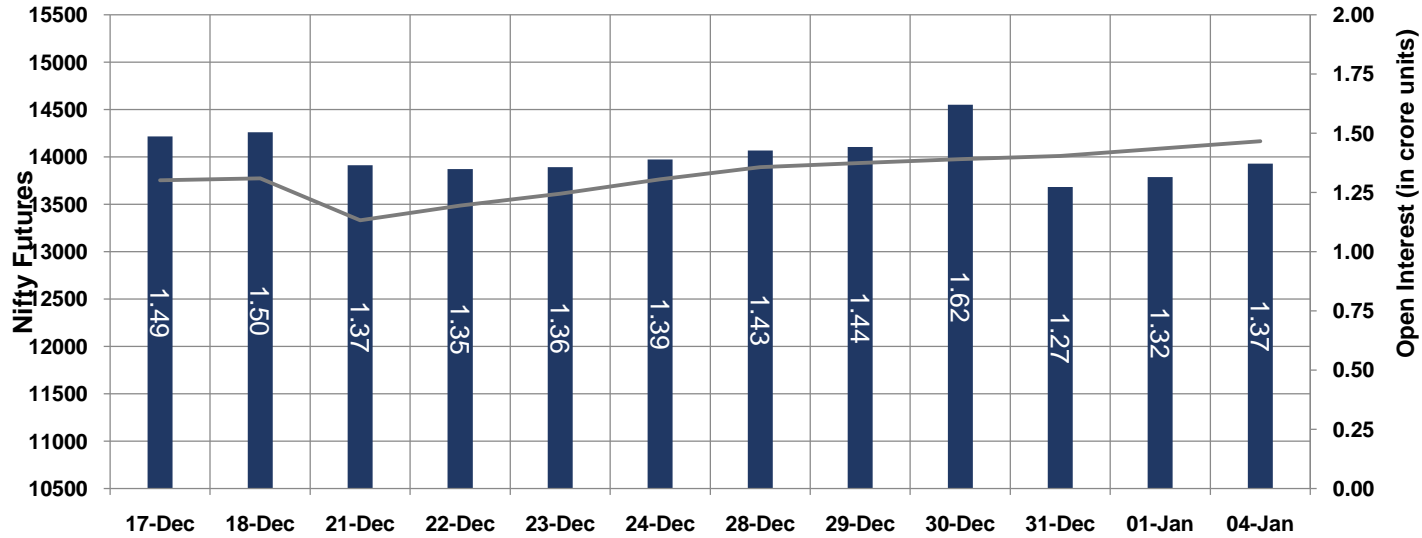
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14133	13884	14008	14078	14203	14272	Buy	Buy	Buy
SENSEX	48177	47371	47774	47997	48400	48623	Buy	Buy	Buy
NIFTY FUTURES	14173	13898	14036	14108	14245	14317	Buy	Buy	Buy
BANK NIFTY	31212	30603	30908	31199	31503	31795	Buy	Buy	Neutral
CNX IT	25110	24276	24693	24926	25343	25576	Buy	Buy	Buy
CNX MIDCAP	21389	20986	21187	21298	21499	21610	Buy	Buy	Neutral
CNX SMALLCAP	7258	7132	7195	7230	7293	7328	Buy	Buy	Neutral

NIFTY TECHNICAL & INDICES LEVEL

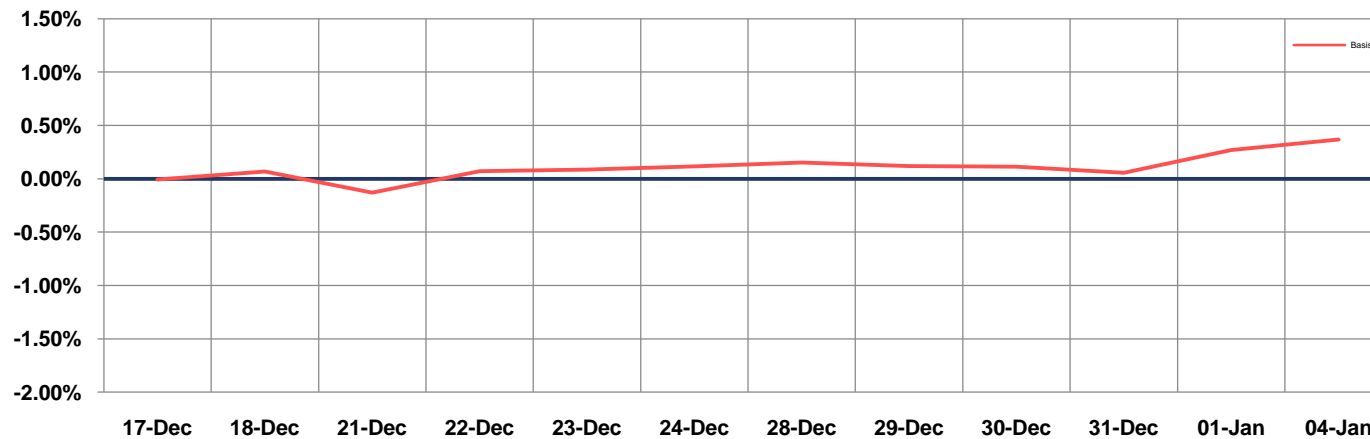
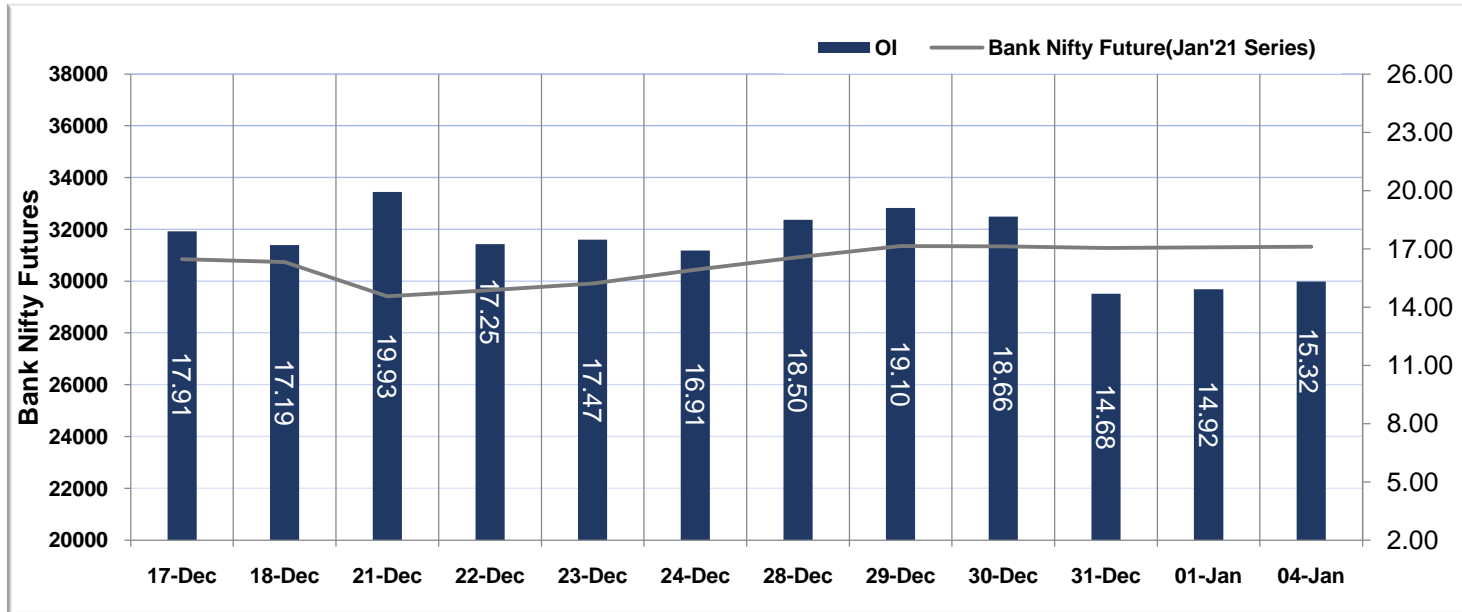


- Nifty Cash prices have settled at 14132.90 up by 0.82 percent from the previous close. On the upper side it has resistance of **14280** and **14360** levels, while lower side it has support of **13950** and **13870** levels. Intraday traders should be cautious and take position accordingly.

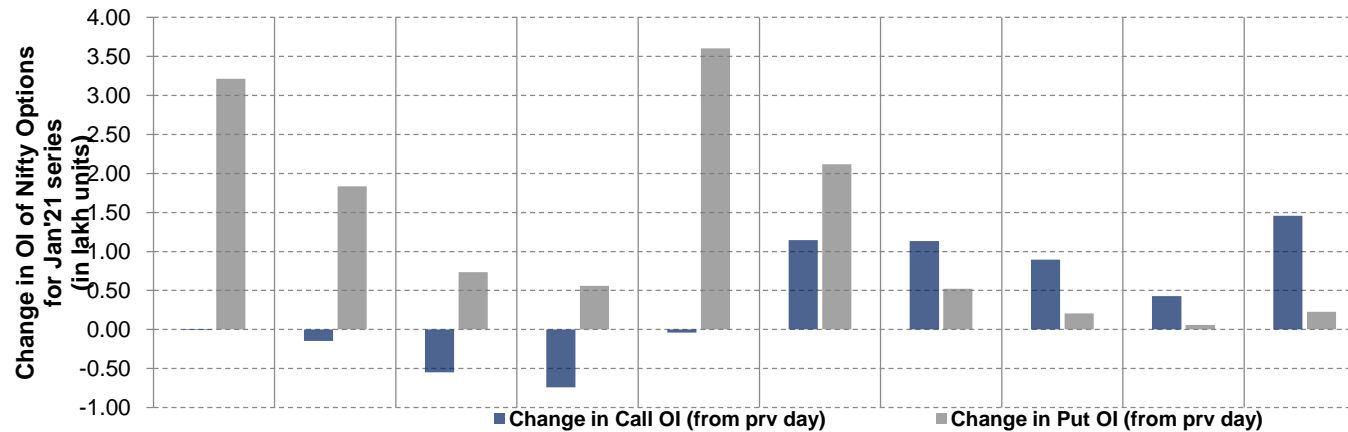
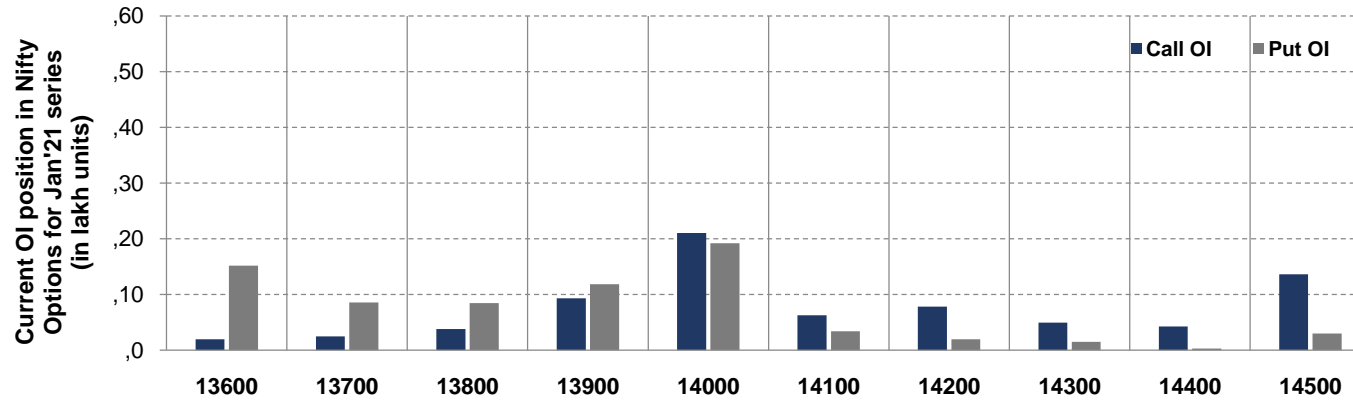
NIFTY FUTURES



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 0.00 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.40 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (2.10mn) and that for Puts was at 14,000 SP (1.92mn)

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