

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

Indian equity benchmarks ended at fresh closing highs on Tuesday. Key indices started the trading day in red terrain, amid reports that India's tax pie seems to have undergone a subtle change with a sharp drop in direct tax collections resulting from a disproportionate impact of the COVID-19 carnage on incomes. The share of indirect taxes, which mainly comprise of levy on goods and services as well as import duty, has risen while that of direct taxes - made up of corporate and personal income tax - has gone down in 2020. Domestic sentiments also remained down-beat with report stated that under the Trump administration, US-India tensions have increased over each side's tariff policies. It also noted that the two sides have also held concerted negotiations to address these trade frictions.

In afternoon deals, markets turned positive to end the session higher, taking support with Minister of State for Finance Anurag Thakur's statement that the central government is making efforts to turn India into a manufacturing and export powerhouse. Thakur said manufacturing will now be broad-based in the country. Besides, the Ministry of Finance has released the 10th weekly instalment of Rs 6,000 crore to the States. Out of this, an amount of Rs 5,516.60 crore has been released to 23 States and an amount of Rs 483.40 crore has been released to the 3 Union Territories (UT) with Legislative Assembly (Delhi, Jammu & Kashmir & Puducherry) who are members of the GST Council. The remaining 5 States, Arunachal Pradesh, Manipur, Mizoram, Nagaland and Sikkim do not have a gap in revenue on account of GST implementation.

On the global front, European markets were trading mostly in red as investors monitored the coronavirus pandemic and the imposition of further restrictions, along with a U.S. Senate runoff election in Georgia. Asian markets ended mostly higher on Tuesday, after Singapore's manufacturing sector expanded for a sixth straight month amid further expansion in the electronics sector. The survey data from the SIPMM Institute showed that the purchasing manager's index for the manufacturing sector edged up to 50.5 from 50.4 in November. A reading above 50 suggests growth in the sector. In October, the score was 50.5. The PMI for the electronics sector also added a 0.1 point to reach 51.2 in December. The sector grew for the fifth month in a row and the reading was the highest since September 2018, when it was 51.4.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48437.78	260.98	0.54
NIFTY	14199.50	66.60	0.47
MIDCAP	18676.13	254.61	1.38
SMLCAP	18641.74	130.91	0.71
BSEFMC	12821.71	31.77	0.25
AUTO	21291.68	-12.80	-0.06
POWER	2095.39	4.06	0.19
REALTY	2497.13	-9.71	-0.39
BSE IT	25442.61	308.88	1.23
BANKEX	36274.81	529.63	1.48
OIL GAS	14368.35	-48.23	-0.33
METAL	12060.63	-165.89	-1.36
INDIA VIX	20.46	0.43	2.15

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1107	865	77
BSE	1751	1317	165

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4939	4402	12
NSE CASH	67635	63622	6
NSE F&O	2772035	2411221	15

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.05	4.02	1.12
SENSEX	33.76	3.30	0.82

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5092	5582	(490)
FII	7039	6053	986

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3193.03	3369.49	(176)
Index Options	293099.19	295029.77	(1931)
Stock Futures	11845.92	11957.27	(111)
Stock Options	5829.28	5896.54	(67)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.62	1.52
BANK NIFTY	1.17	0.73

SECURITIES BAN FOR TRADE IN F&O FOR 06-01-2021

SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.850	5.858	-0.14
USA	0.928	0.917	1.22

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.75	89.86	-0.12

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.38	0.19	0.26
27-Jan-21 EUR-INR	90.03	0.15	0.17
27-Jan-21 GBP-INR	99.66	-0.38	-0.38
27-Jan-21 JPY- INR	71.29	0.20	0.28

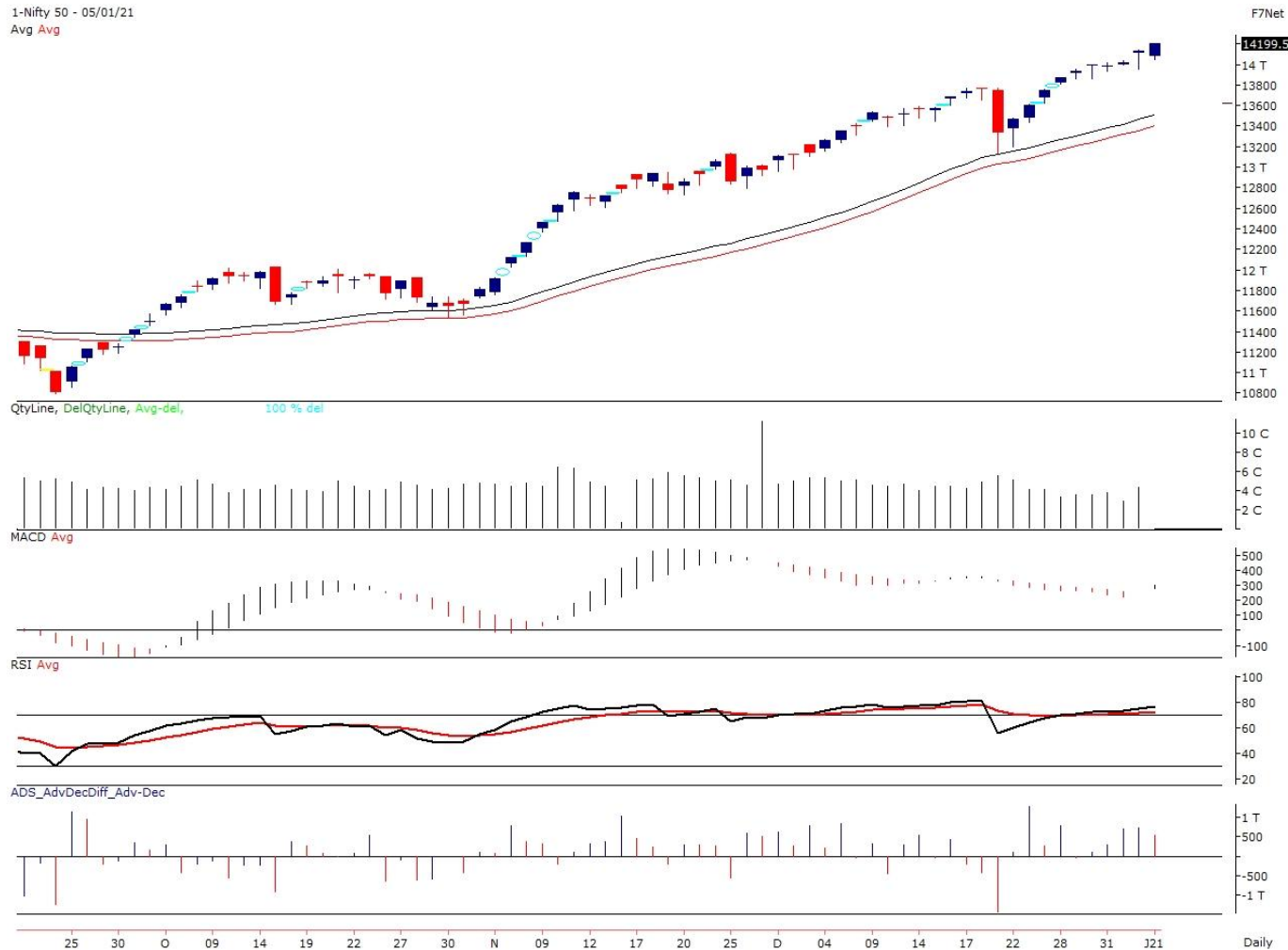
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1945.60	3.80	0.20
Silver	27.34	0.17	0.63
Crude-Oil	49.55	1.93	4.05
Brent-Crude	52.84	1.75	3.43

INDEX TREND ANALYSIS

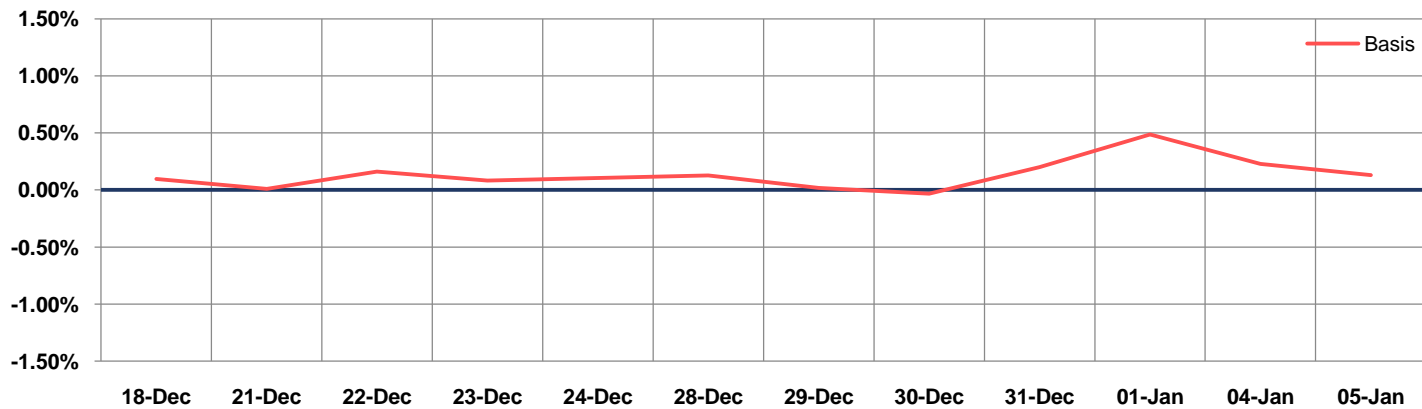
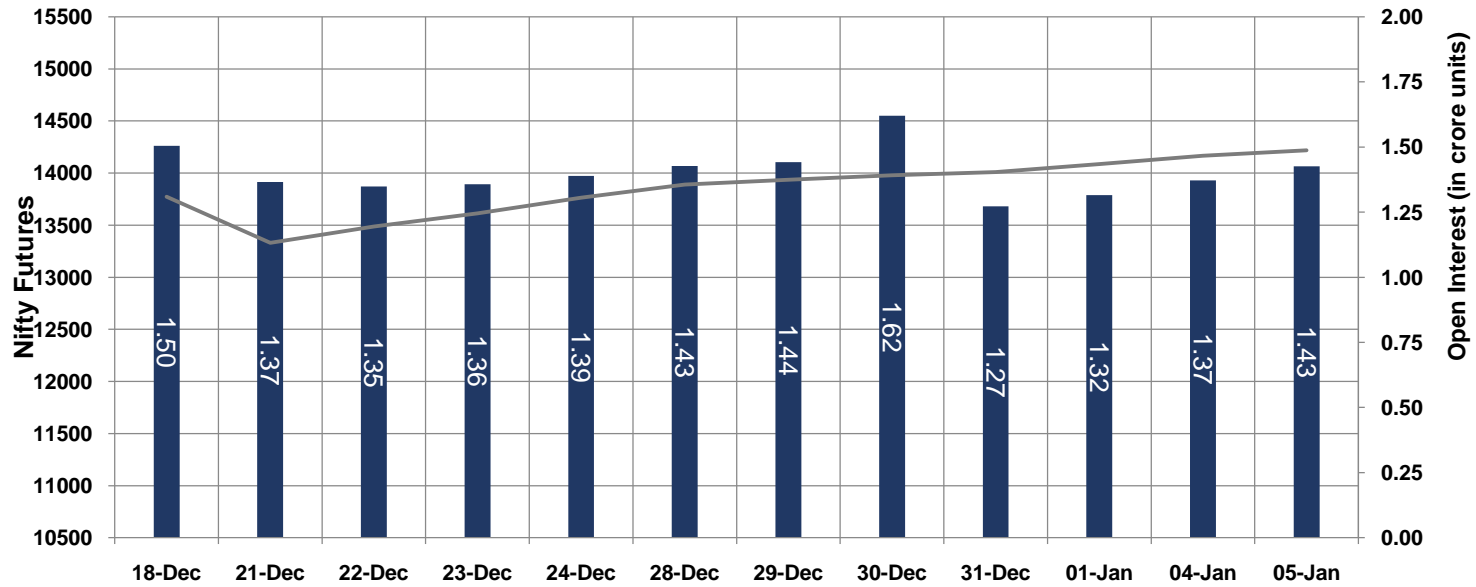
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14199	13987	14093	14154	14261	14322	Buy	Buy	Buy
SENSEX	48438	47693	48065	48276	48648	48859	Buy	Buy	Buy
NIFTY FUTURES	14217	14023	14120	14174	47271	14325	Buy	Buy	Buy
BANK NIFTY	31722	30643	31183	31475	32015	32307	Buy	Buy	Buy
CNX IT	25769	24747	25258	25541	26052	26335	Buy	Buy	Buy
CNX MIDCAP	21534	21067	21300	21430	21663	21793	Buy	Buy	Buy
CNX SMALLCAP	7302	7141	7221	7265	7345	7388	Buy	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

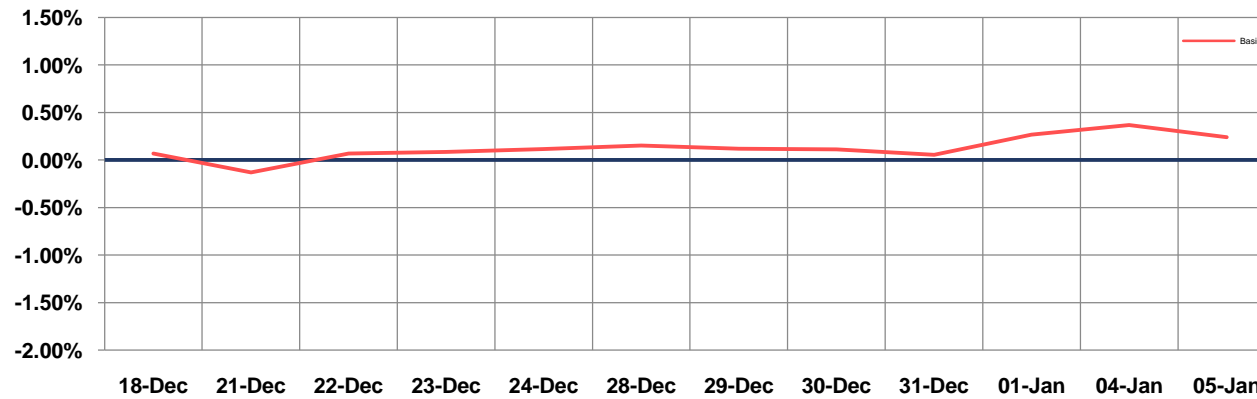
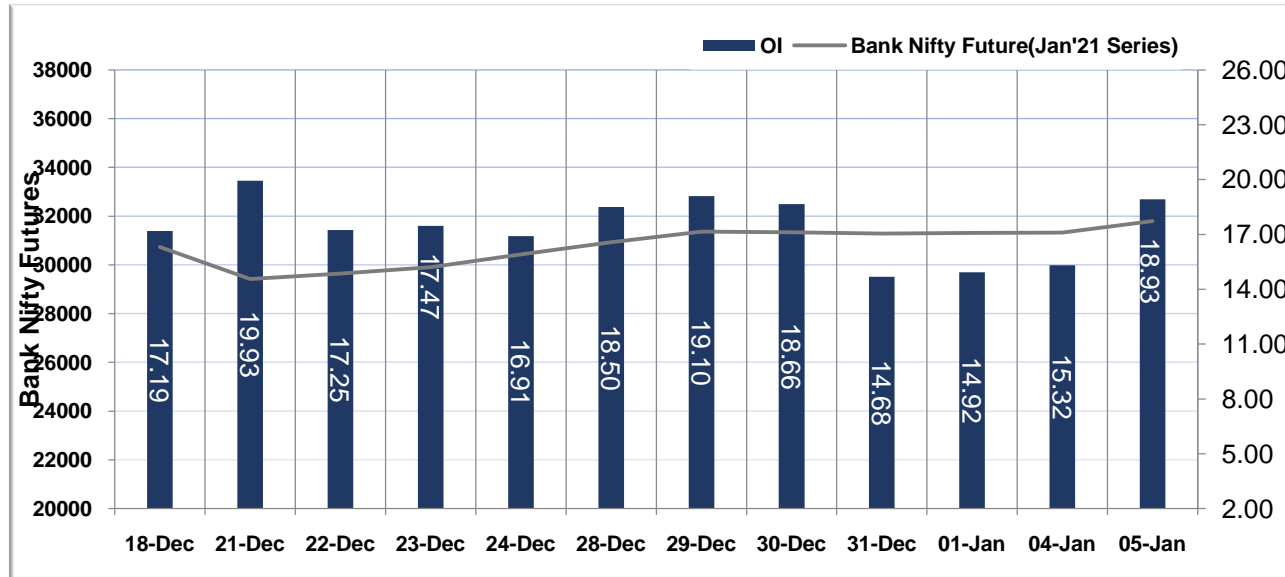


➤ Nifty Cash prices have settled at 14199.50 up by 0.47 percent from the previous close. On the upper side it has resistance of **14310** and **14430** levels, while lower side it has support of **14020** and **13980** levels. Intraday traders should be cautious and take position accordingly.

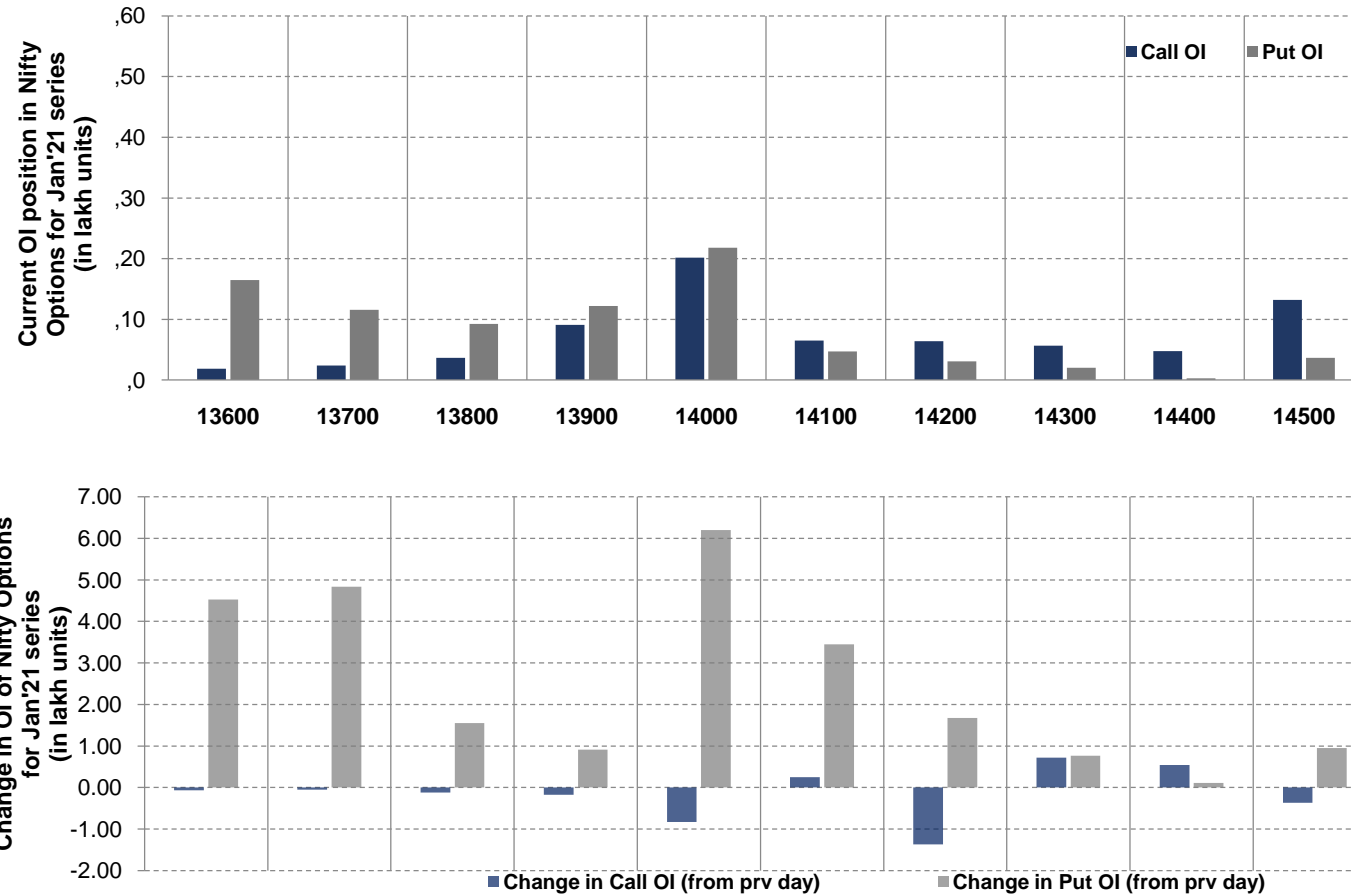
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,000 SP from the Jan month expiry was the most active call with a reduction of 0.10 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.62 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (2.02mn) and that for Puts was at 14,000 SP (2.20mn)

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