

# *Morning Mantra*

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

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## MARKET COMMENTARY

Indian equity benchmarks failed to continue gaining rally on Wednesday, with Sensex and Nifty ending lower. The start of the day was on a cautious note, as the World Bank in its Global Economic Prospects report has stated that India's economy is estimated to contract by 9.6 per cent in the fiscal year 2020-21 (FY21), reflecting a sharp drop in household spending and private investment. Report said that the informal sector, which accounts for four-fifths of employment, has been subject to severe income losses during the COVID-19 pandemic. In India, the pandemic hit the economy at a time when growth was already decelerating. The street took a note of a Reserve Bank paper stating that an increase in credit may not always find its way towards investments as business entities may use credit lines to finance their current liabilities.

In the second half of the day, key indices added more losses to end in red terrain, after India's services sector activity expanded at a slower pace in December as rates of growth in sales eased to a three-month low and staff hiring came to a halt amid weak business optimism. The seasonally adjusted India Services Business Activity Index fell from 53.7 in November to 52.3 in December. The index was above the critical 50 mark that separates growth from contraction for the third month in a row during December, but pointed to the slowest pace of expansion in the three-month sequence. Traders overlooked the Finance Ministry's report that approval of the long-awaited COVID-19 vaccine provides strength to the optimism on both health and economic fronts, despite continuing surge in global cases and the potential challenge of a mutant strain.

On the global front, European markets were trading marginally higher, as the coronavirus pandemic and U.S. political developments remain a key focus for investors. Asian markets ended mostly lower on Wednesday, after the services sector in China continued to expand in December, albeit at a slower pace, the latest survey from Caixin showed on Wednesday with a services PMI score of 56.3. That's down from 57.8 in November, although it remains well above the boom-or-bust line of 50 that separates expansion from contraction. Individually, the softer rise in overall activity coincided with a slower expansion of total new work at the end of 2020. Although rising solidly overall, the latest increase in new business was the least marked since September.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48174.06	-263.72	-0.54
NIFTY	14146.25	-53.25	-0.38
MIDCAP	18749.03	72.90	0.39
SMLCAP	18615.17	-26.57	-0.14
BSEFMC	12662.56	-159.15	-1.24
AUTO	21218.80	-72.88	-0.34
POWER	2126.96	31.57	1.51
REALTY	2518.29	21.16	0.85
BSE IT	25188.10	-254.51	-1.00
BANKEX	36396.92	122.11	0.34
OIL GAS	14426.07	57.72	0.40
METAL	12318.81	258.18	2.14
INDIA VIX	21.00	0.54	2.61

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	851	1119	69
BSE	1526	1585	122

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6514	4939	32
NSE CASH	77929	67635	15
NSE F&O	3930887	2772035	42

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	38.90	4.01	1.12
SENSEX	33.59	3.28	0.83

## FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5686	6066	(380)
FII	6733	7217	(484)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3510.20	3805.41	(295)
Index Options	468040.80	459963.04	8078
Stock Futures	14750.62	14653.16	97
Stock Options	8079.67	8174.09	(94)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.25	1.62
BANK NIFTY	1.05	1.17

## SECURITIES BAN FOR TRADE IN F&O FOR 07-01-2021

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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.895	5.850	0.77
USA	1.014	0.955	6.14

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.64	89.43	0.23

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.25	-0.14	-0.19
27-Jan-21 EUR-INR	90.25	0.23	0.26
27-Jan-21 GBP-INR	99.84	0.19	0.19
27-Jan-21 JPY- INR	71.12	-0.15	-0.21

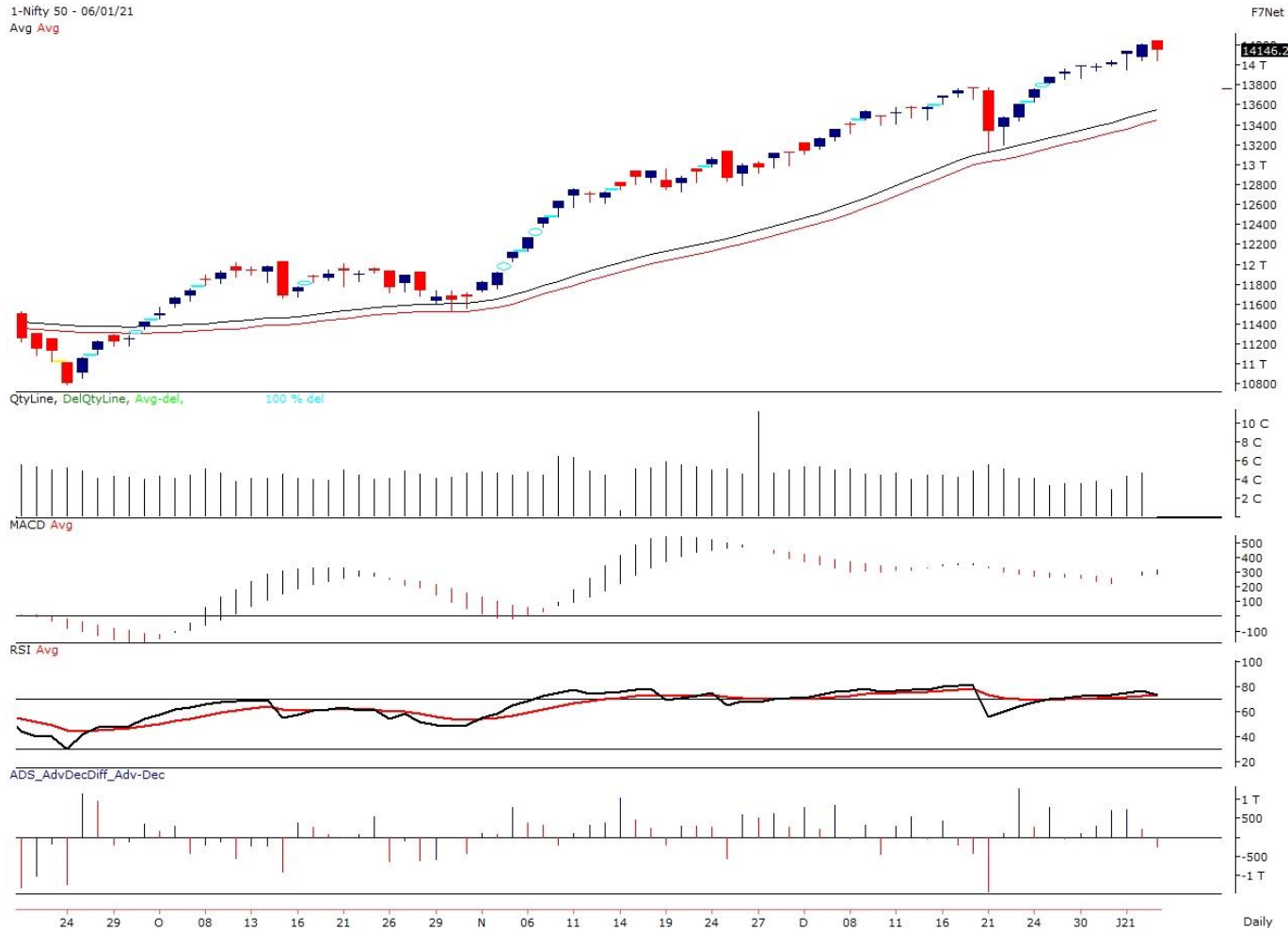
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1935.75	-14.53	-0.73
Silver	27.32	-0.26	-0.98
Crude-Oil	50.02	0.09	0.80
Brent-Crude	53.85	0.25	0.47

## INDEX TREND ANALYSIS

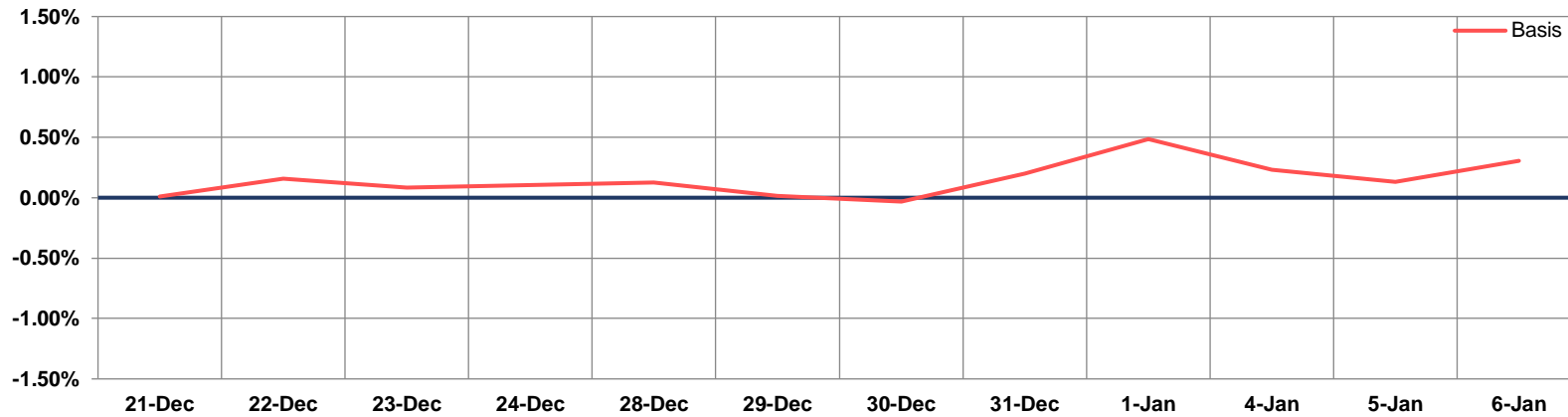
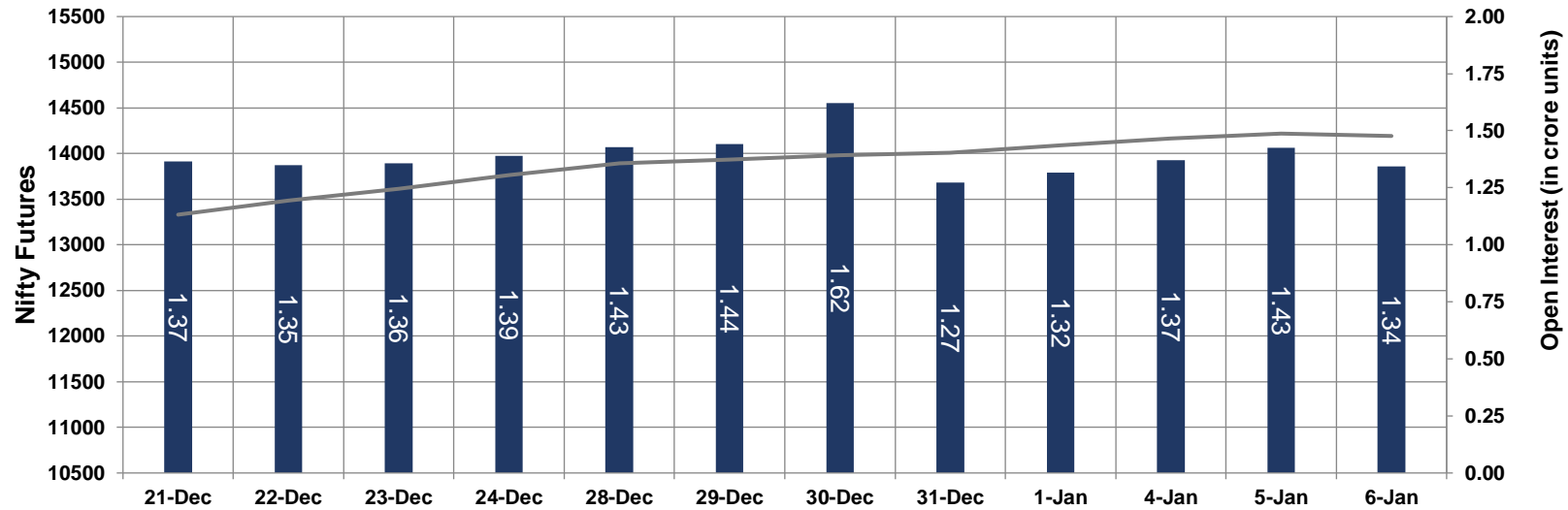
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14146	13939	14043	14143	14246	14348	Buy	Buy	Buy
SENSEX	48174	47466	47820	48218	48572	48971	Buy	Buy	Buy
NIFTY FUTURES	14174	13994	14084	14168	14259	14343	Buy	Buy	Buy
BANK NIFTY	31798	31342	31570	31776	32004	32210	Buy	Buy	Buy
CNX IT	25419	24769	25094	25565	25890	26362	Buy	Buy	Buy
CNX MIDCAP	21651	21210	21431	21615	21836	22020	Buy	Buy	Buy
CNX SMALLCAP	7299	7146	7222	7304	7380	7462	Buy	Buy	Buy

## NIFTY TECHNICAL & INDICES LEVEL

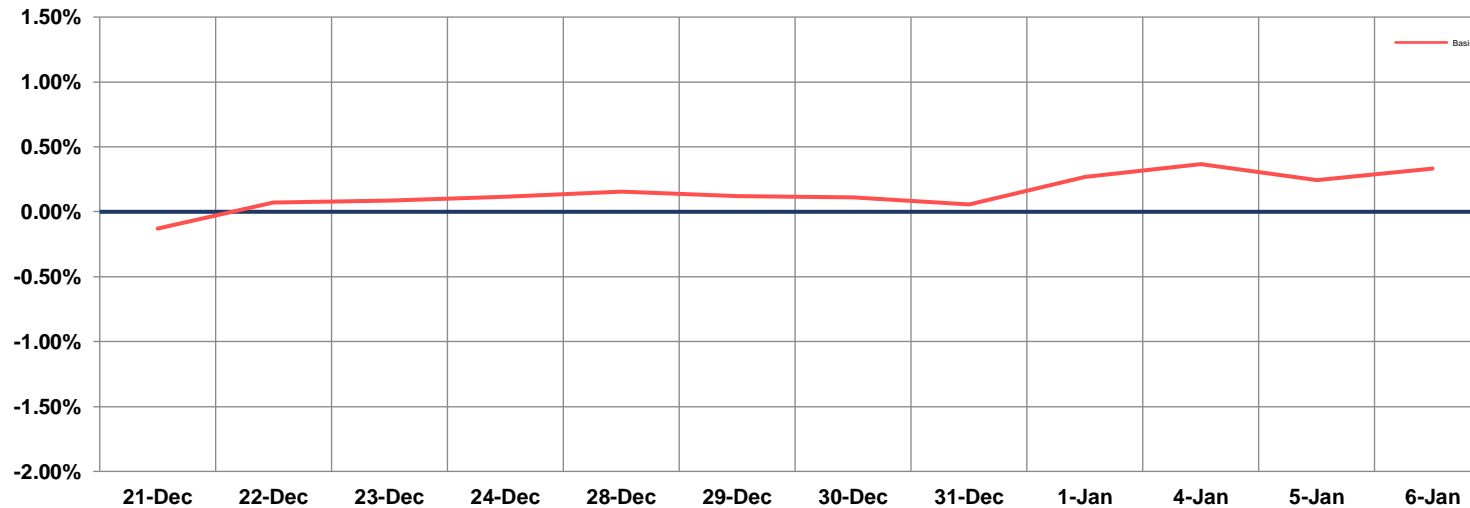
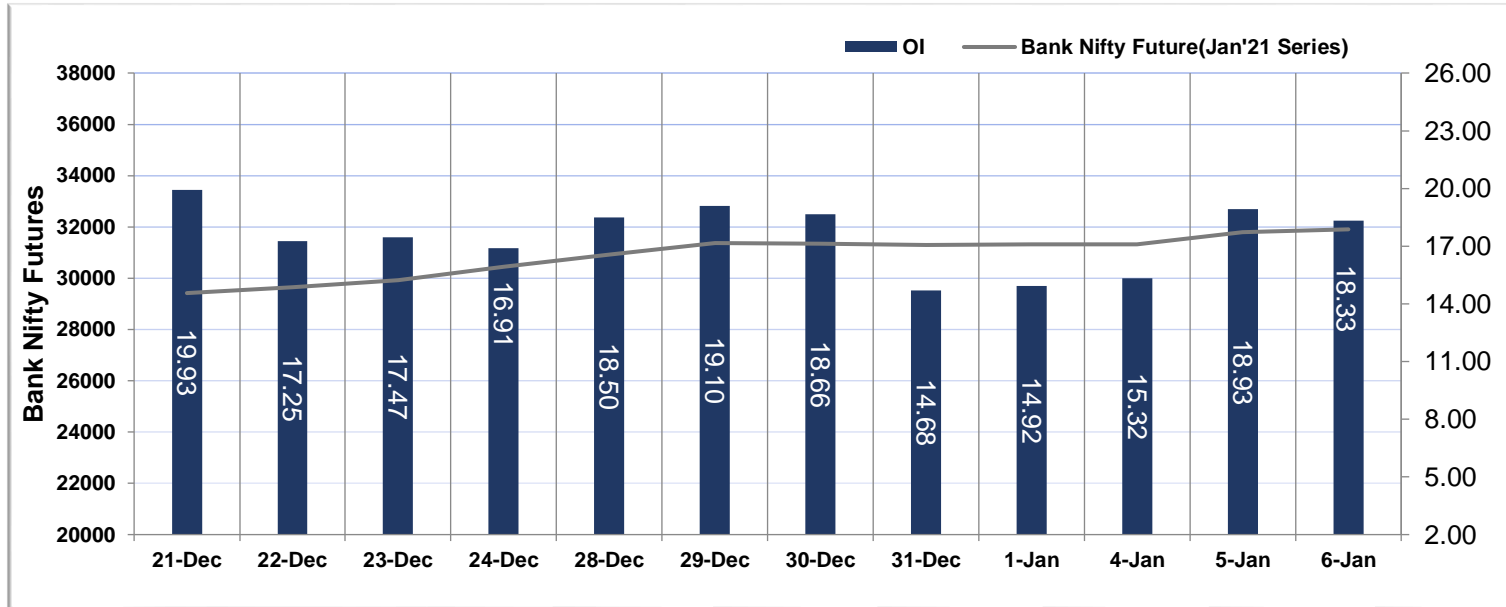


➤ Nifty Cash prices have settled at 14146.25 down by 0.38 percent from the previous close. On the upper side it has resistance of **14260** and **14330** levels, while lower side it has support of **14020** and **13980** levels. Intraday traders should be cautious and take position accordingly.

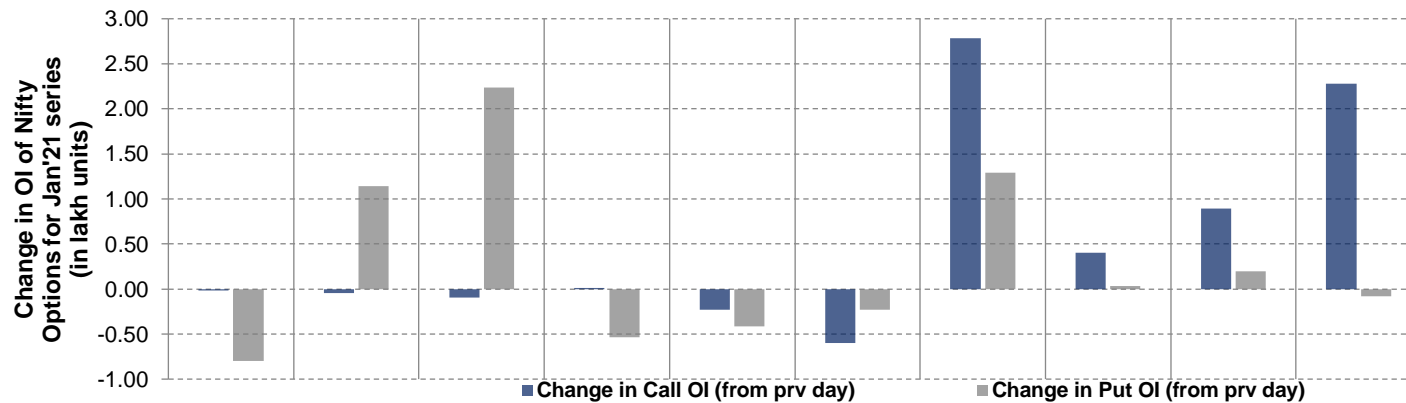
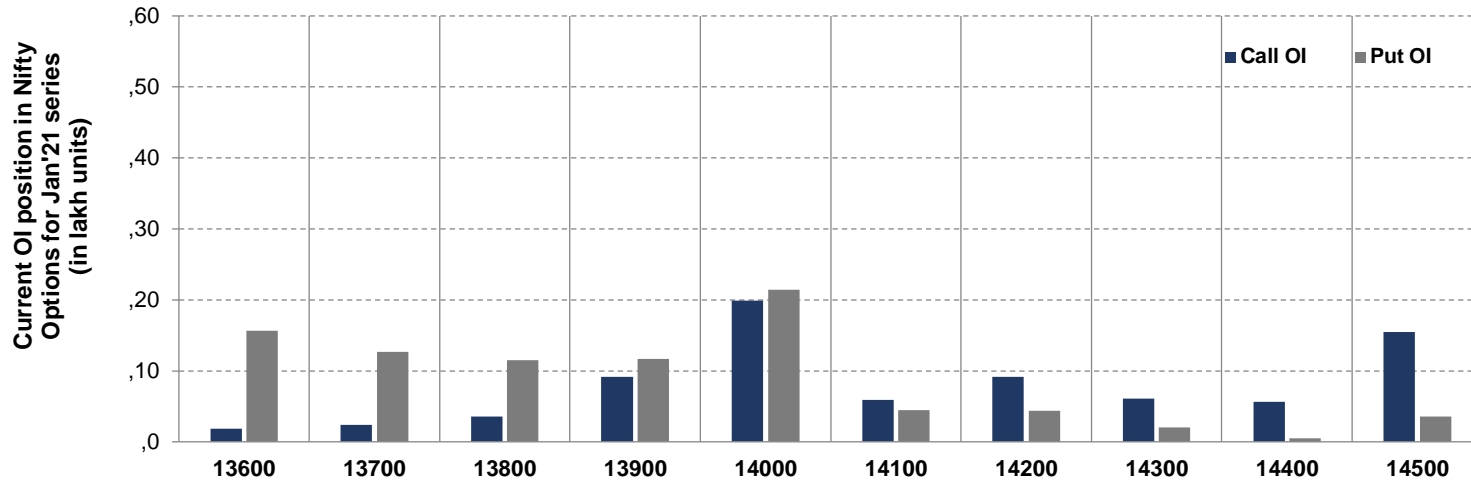
## NIFTY FUTURES



## 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 0.02 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with a reduction of 0.04 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (2.00mn) and that for Puts was at 14,000 SP (2.14mn)



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