

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 with strong gains on Friday's trading session. After a positive start of the day, key indices remained higher for the whole trading session, taking support with report that India in 2020 has been one of the biggest and fastest-growing technology markets in the world. Digital and technology adoption in India has been increasing at a steady rate over the last few years, and the current COVID-19 pandemic has accelerated the rate of technology adoption across sectors, including in high involvement services such as education and healthcare. Some support also came with report that the RBI will conduct simultaneous purchase and sale of government securities under Open Market Operations (OMO) for Rs 10,000 crore each on January 14. The decision was taken after a review of current liquidity and financial conditions.

Markets added more gains in the last hour of the trade, as the Central Board of Indirect Taxes & Customs (CBIC) has introduced liberalised Authorised Economic Operator package for micro, small and medium enterprises (MSMEs) for swift customs clearances. In order to attract MSMEs to become Authorised Economic Operators (AEOs) and avail various benefits, the CBIC has relaxed the compliance criteria provided the MSMEs have a valid certificate from their line-ministry. Domestic sentiments were also positive, amid private reports that there were more jobs on offer in India in December 2020 compared to the previous month. Both the Monster Employment Index and Naukri Job Speak report saw an uptick in hiring pace in December lead by sectors like healthcare and life sciences and especially in Tier 2 cities. Jobs in the travel and tourism sector continue to reel under the impact of the Coronavirus lockdown.

On the global front, European markets were trading higher as global investors anticipate that a Democratic-controlled U.S. government will lead to greater fiscal support. Asian markets finished mostly higher on Friday, after the average of household spending in Japan was up 1.1 percent on year in November, the Ministry of Internal Affairs and Communications said on Friday - coming in at 278,718 yen. That beat expectations for a decline of 1.5 percent following the 1.9 percent increase in October. On a monthly basis, household spending sank 1.8 percent, missing expectations for a loss of 1.3 percent after gaining 2.1 percent in the previous month. The average of monthly income per household stood at 473,294 yen, up 0.6 percent on year.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48782.51	689.19	1.43
NIFTY	14347.25	209.90	1.48
MIDCAP	19138.72	191.98	1.01
SMLCAP	18908.59	135.73	0.72
BSEFMC	12595.44	69.00	0.55
AUTO	21997.89	716.85	3.37
POWER	2138.75	24.88	1.18
REALTY	2584.21	34.94	1.37
BSE IT	25835.98	886.67	3.55
BANEX	36658.77	167.00	0.46
OIL GAS	14732.06	233.73	1.61
METAL	12657.93	-116.38	-0.91
INDIA VIX	20.64	0.03	0.12

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1065	880	93
BSE	1734	1388	145

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5522	5674	(3)
NSE CASH	75971	73211	4
NSE F&O	1772980	6051311	(71)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.45	4.07	1.11
SENSEX	33.93	3.31	0.82

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4793	7165	(2373)
FII	13171	7141	6030

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4145.78	3012.83	1133
Index Options	178302.83	178305.08	(2)
Stock Futures	13553.16	12868.25	685
Stock Options	8114.87	8237.23	(122)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.71	1.19
BANK NIFTY	1.04	1.04

SECURITIES BAN FOR TRADE IN F&O FOR 11-01-2021

SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.893	5.892	0.02
USA	1.085	1.071	1.28

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.04	89.82	0.22

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.39	-0.15	-0.20
27-Jan-21 EUR-INR	89.93	-0.06	-0.06
27-Jan-21 GBP-INR	99.49	-0.19	-0.19
27-Jan-21 JPY- INR	70.59	-0.26	-0.37

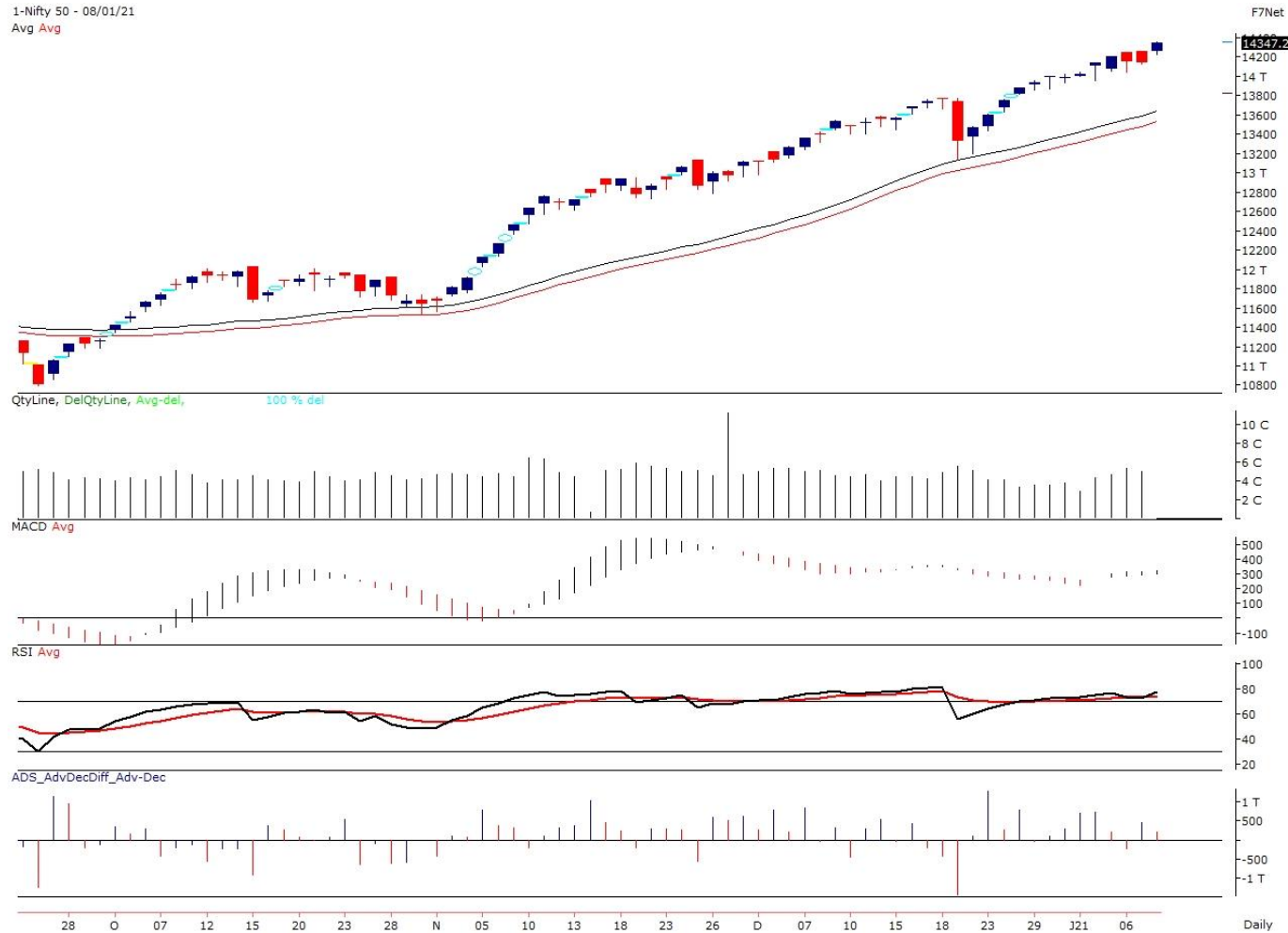
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1865.23	-51.95	-2.72
Silver	25.92	-1.26	-4.64
Crude-Oil	51.64	0.82	1.61
Brent-Crude	55.48	1.09	1.99

INDEX TREND ANALYSIS

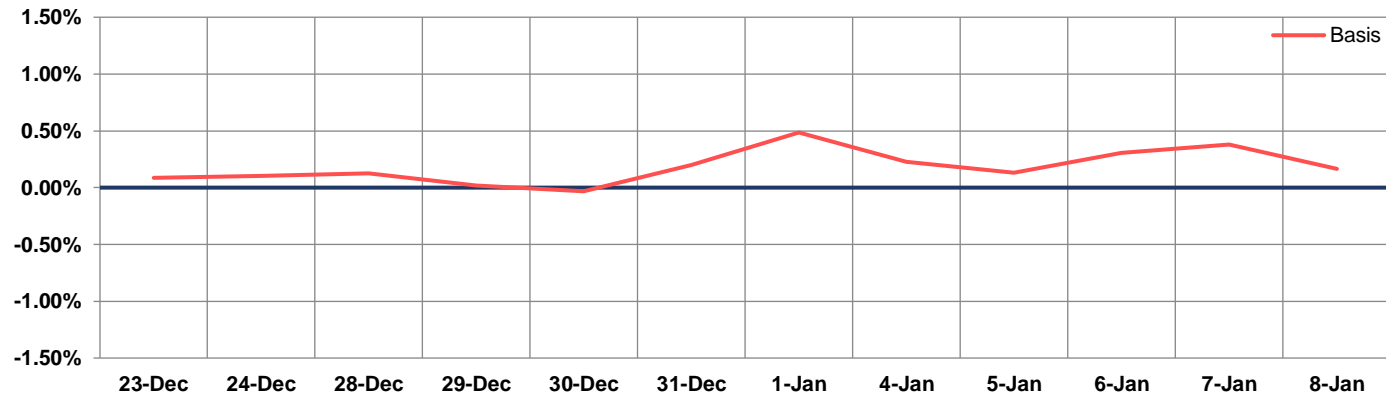
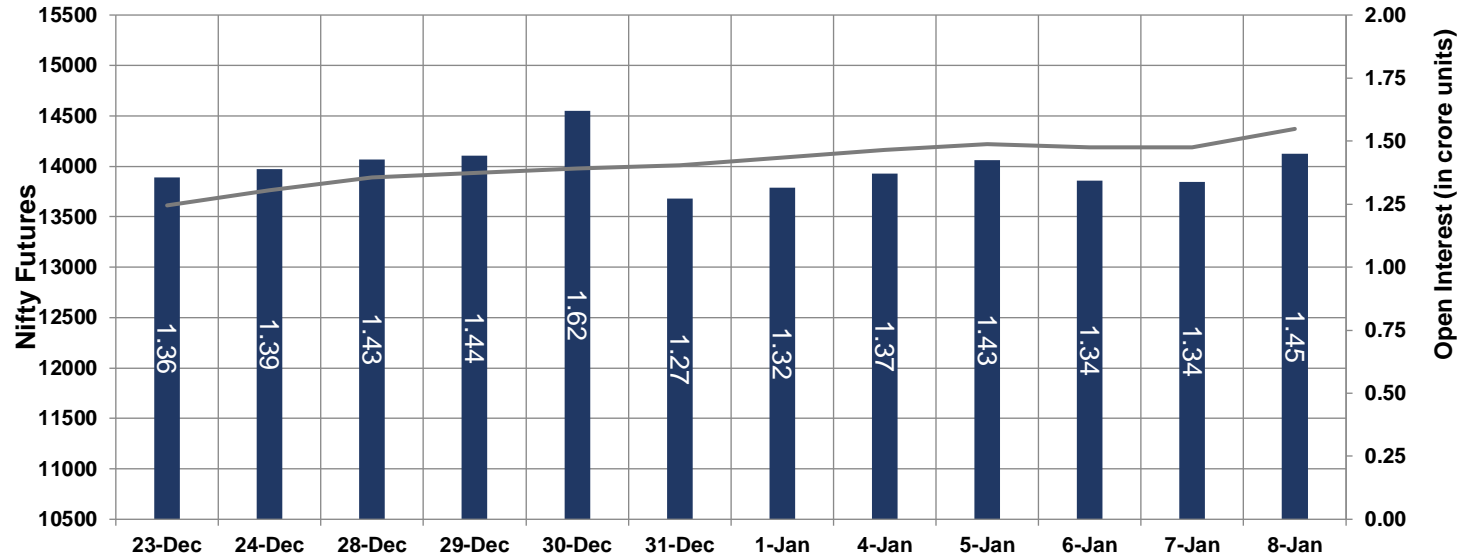
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14347	14166	14257	14312	14402	14458	Buy	Buy	Buy
SENSEX	48782	48179	48481	48667	48969	49156	Buy	Buy	Buy
NIFTY FUTURES	14374	14204	14289	14334	14419	14464	Buy	Buy	Buy
BANK NIFTY	32084	31833	31959	32128	32254	32423	Buy	Buy	Buy
CNX IT	26162	25267	25715	25791	26419	26675	Buy	Buy	Buy
CNX MIDCAP	22194	21989	22092	22173	22275	22356	Buy	Buy	Buy
CNX SMALLCAP	7443	7386	7414	7453	7482	7521	Buy	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

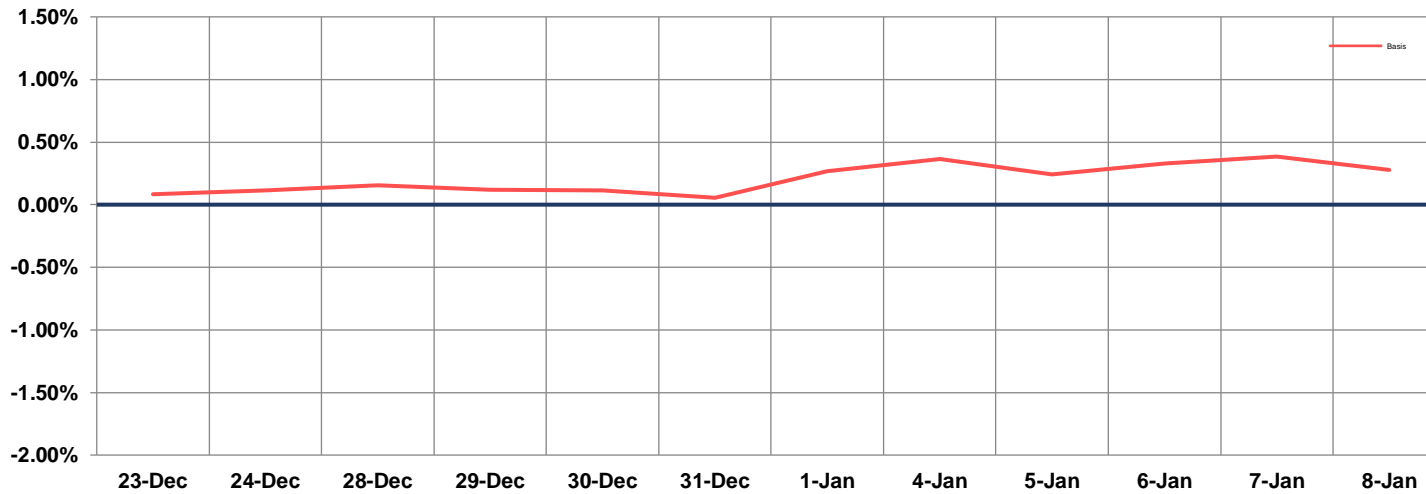
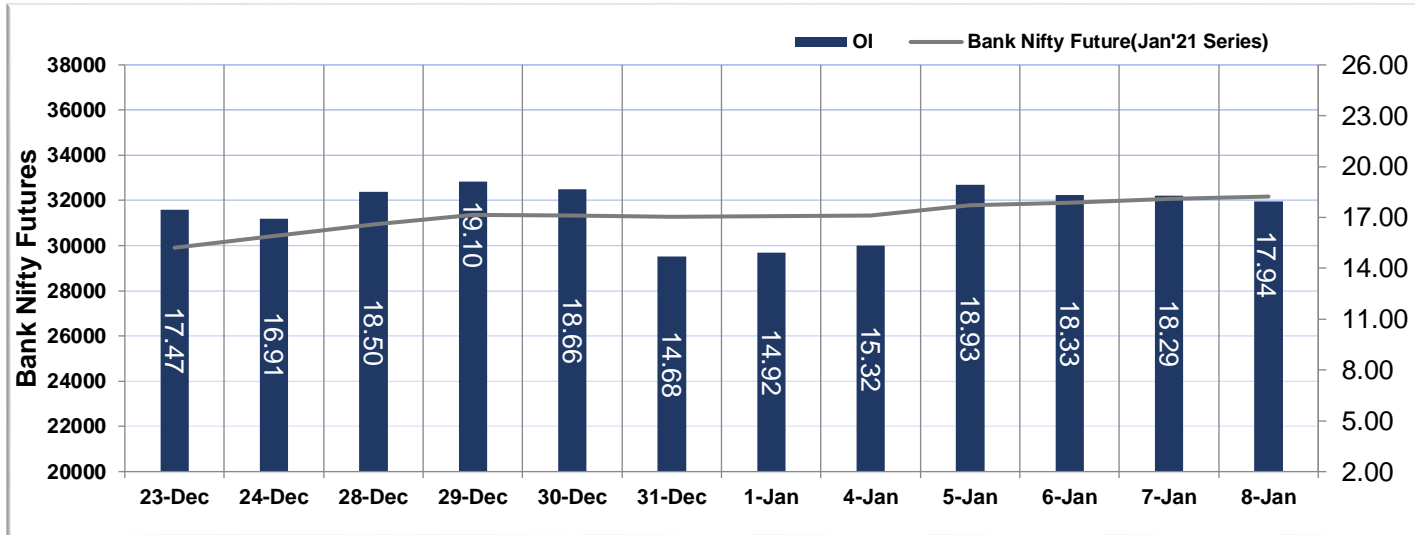


➤ Nifty Cash prices have settled at 14377.25 up by 1.48 percent from the previous close. On the upper side it has resistance of **14410** and **14550** levels, while lower side it has support of **14240** and **14150** levels. Intraday traders should be cautious and take position accordingly.

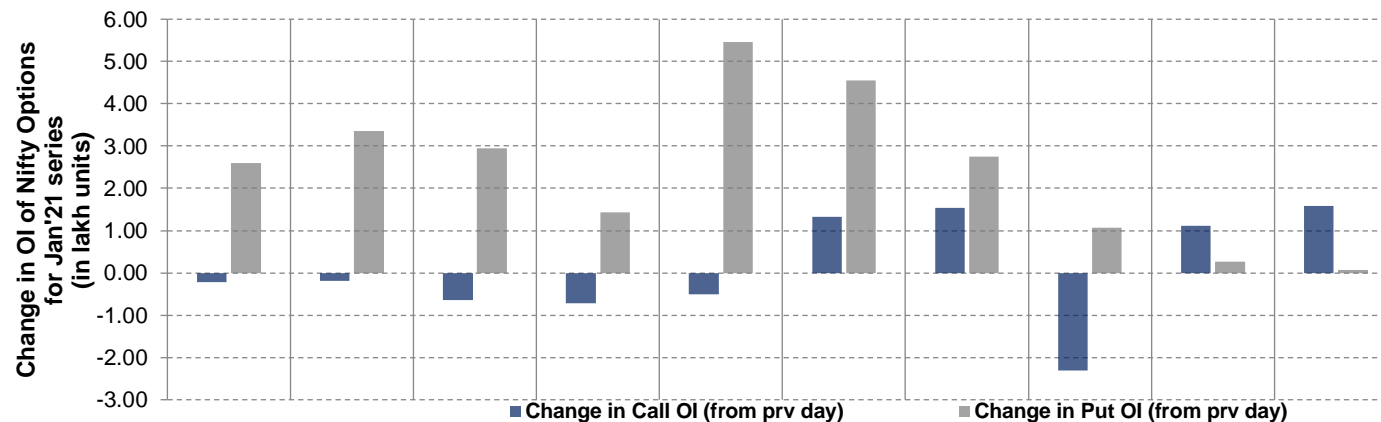
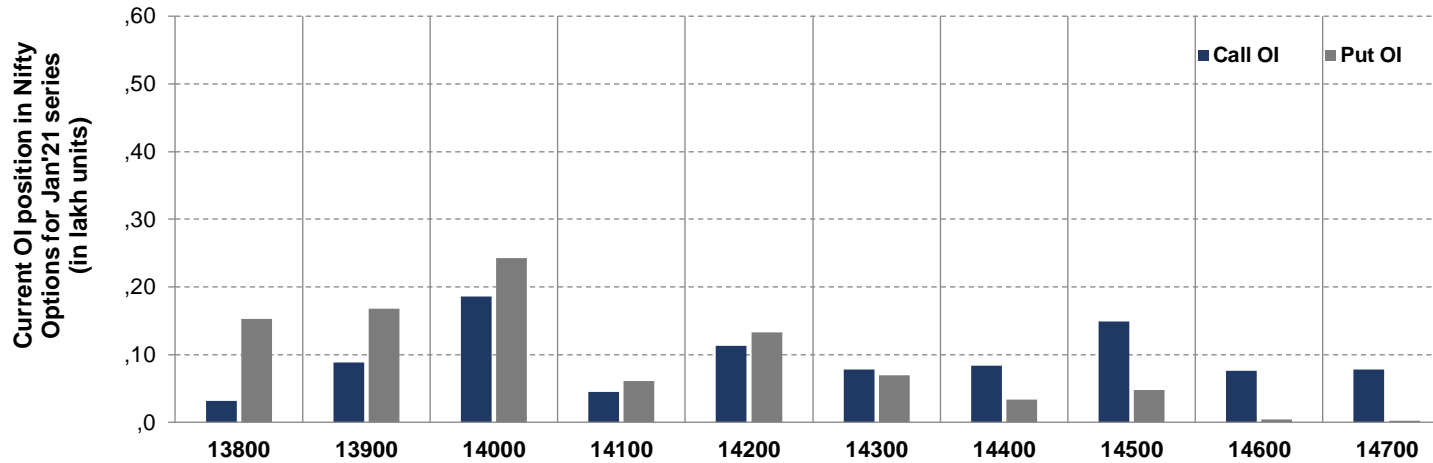
NIFTY FUTURES



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 0.06 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.30 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (1.90mn) and that for Puts was at 14,000 SP (2.42mn)

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