

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended at fresh closing highs on Monday's trading session. The start of the day was in green terrain, supported with Assocham's statement that India's economy is showing decisive signs of a V-shaped recovery in 2021 with the return of consumer confidence, robust financial markets, an uptick in manufacturing and exporters braving it out in the global market with never-say-die spirit. Also, IHS Markit said Indian economy is likely to rebound with an 8.9 per cent growth in the fiscal year beginning April 2021 after economic activity showed significant improvement in the last quarter.

Traders also got relief as Fitch Ratings expects India's economy to contract by a record 9.4 per cent in the current fiscal year ending March 2021 (FY21) amid the shock from coronavirus pandemic but this represents a 1.1 percentage point improvement from its previous forecast, reflecting a stronger-than-anticipated rebound in 3Q 2020. Risks to the growth outlook appear to have eased in recent weeks as vaccine rollouts began in other parts of the world. Fitch said forward-looking indicators suggest gathering momentum in the domestic economy, supporting its forecast that output will grow by 11 per cent in FY22.

Key indices remained higher for the whole trading session, amid a report that India's exports grew 16.22 percent YoY to \$6.21 billion in the first week of January, mainly driven by healthy growth in pharmaceuticals, and engineering sectors, reflecting signs of revival. Imports during January 1-7 this year too increased by 1.07 percent to \$8.7 billion as against \$8.6 billion in the same period of 2020. Traders took note of Union Minister Piyush Goyal's statement that India is strengthening the entire ecosystem to achieve Prime Minister Narendra Modi's dream of becoming a \$5 trillion economy by 2025 through rapid structural reforms.

On the global front, European markets were trading lower. Asian markets ended mostly lower on Monday, after consumer prices in China were up 0.2 percent on year in December. The National Bureau of Statistics said that exceeded expectations for an increase of 0.1 percent following the 0.5 percent contraction in November. On a monthly basis, inflation was up 0.7 percent - again beating forecasts for an increase of 0.4 percent following the 0.6 percent decline in the previous month. The bureau also said that producer prices were down 0.4 percent on year, beating forecasts for a fall of 0.8 percent after sinking 1.5 percent a month earlier.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49269.32	486.81	1.00
NIFTY	14484.75	137.50	0.96
MIDCAP	19124.30	-14.42	-0.08
SMLCAP	18876.44	-32.15	-0.17
BSEFMC	12733.28	137.84	1.09
AUTO	22561.35	563.46	2.56
POWER	2117.62	-21.13	-0.99
REALTY	2601.59	17.38	0.67
BSE IT	26773.02	937.04	3.63
BANKEK	36522.98	-135.79	-0.37
OIL GAS	14780.37	48.31	0.33
METAL	12512.27	-145.66	-1.15
INDIA VIX	22.38	1.74	8.44

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	774	1204	76
BSE	1468	1690	141

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5044	5522	(9)
NSE CASH	72302	75971	(5)
NSE F&O	2116223	1772980	19

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.72	4.10	1.10
SENSEX	34.32	3.37	0.81

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4497	7107	(2610)
FII	9652	6513	3139

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2901.73	4258.86	(1357)
Index Options	231385.03	229870.96	1514
Stock Futures	13352.53	12655.75	697
Stock Options	9570.45	9707.70	(137)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.80	1.71
BANK NIFTY	0.87	1.04

SECURITIES BAN FOR TRADE IN F&O FOR 12-01-2021

SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.924	5.892	0.54
USA	1.104	1.107	-0.32

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.60	90.29	0.36

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.54	0.15	0.21
27-Jan-21 EUR-INR	89.39	-0.42	-0.46
27-Jan-21 GBP-INR	99.15	-0.51	-0.51
27-Jan-21 JPY- INR	70.63	0.00	-

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1841.16	-7.73	-0.40
Silver	24.88	-0.48	-1.89
Crude-Oil	51.56	-0.58	-1.11
Brent-Crude	55.19	-0.83	-1.45

INDEX TREND ANALYSIS

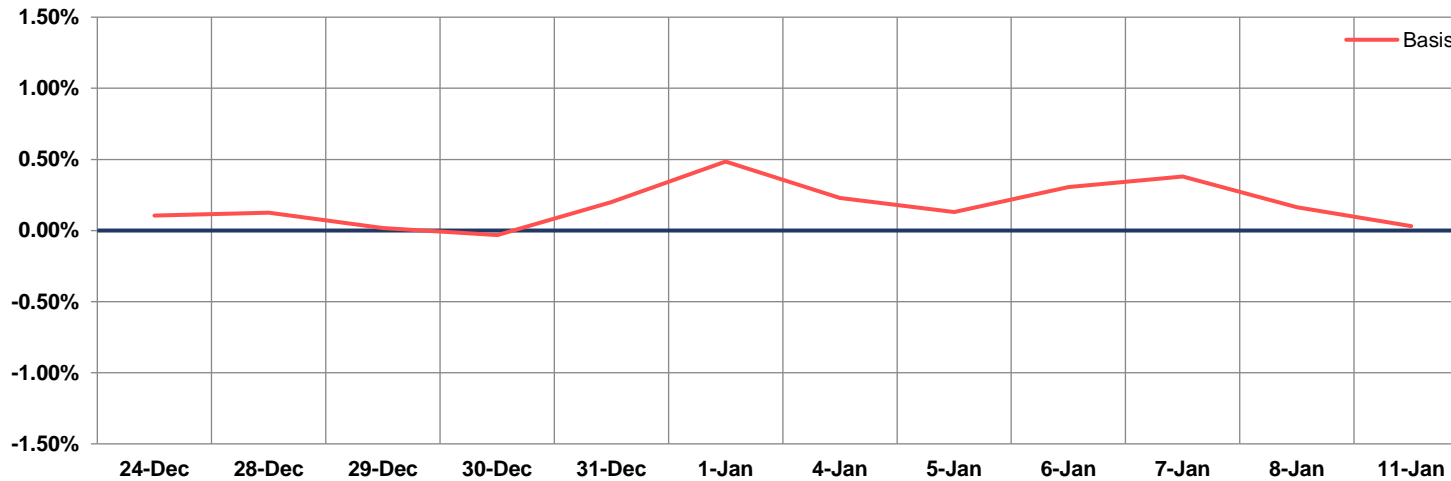
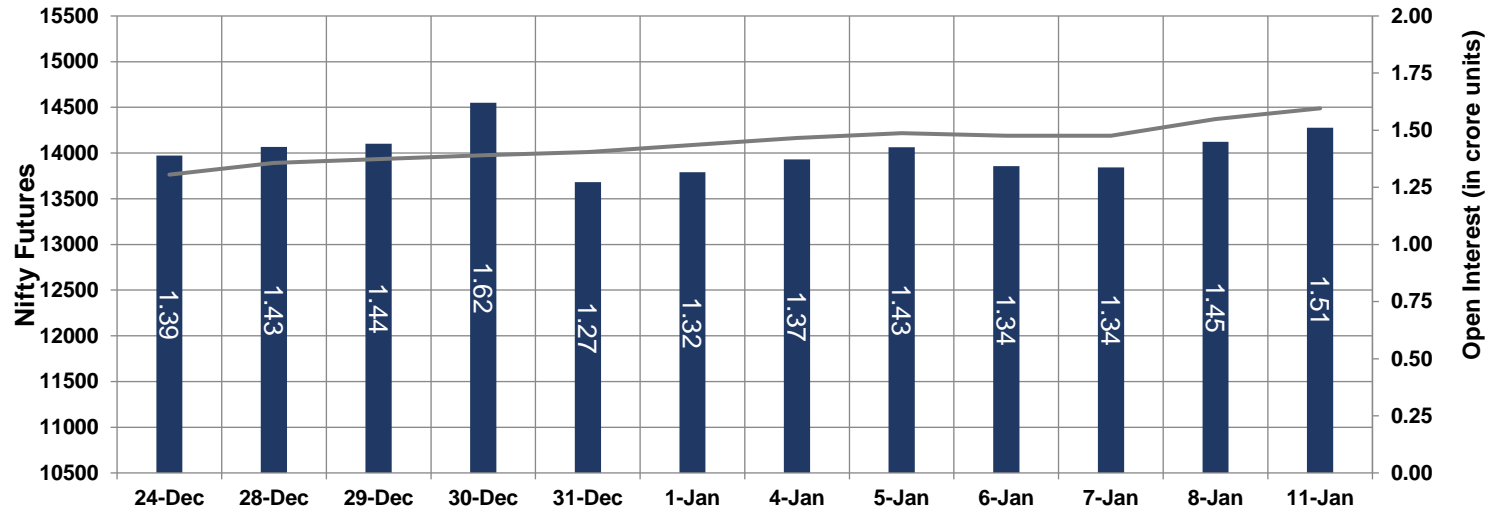
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14485	14340	14412	14455	14528	14570	Buy	Buy	Buy
SENSEX	49269	48829	49049	49176	49397	49524	Buy	Buy	Buy
NIFTY FUTURES	14493	14367	14430	14464	14528	14562	Buy	Buy	Buy
BANK NIFTY	31999	31590	31794	32041	32246	32493	Buy	Buy	Buy
CNX IT	27028	26316	26672	26884	27240	27452	Buy	Buy	Buy
CNX MIDCAP	22140	21762	21951	22155	22344	22548	Buy	Buy	Buy
CNX SMALLCAP	7440	7349	7395	7460	7506	7571	Buy	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

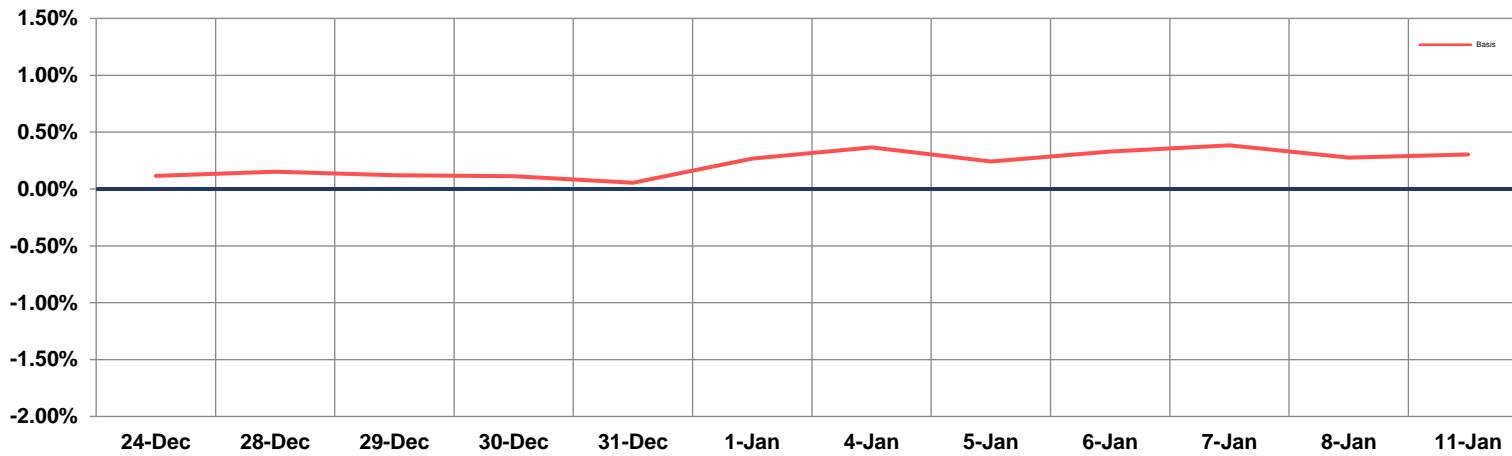
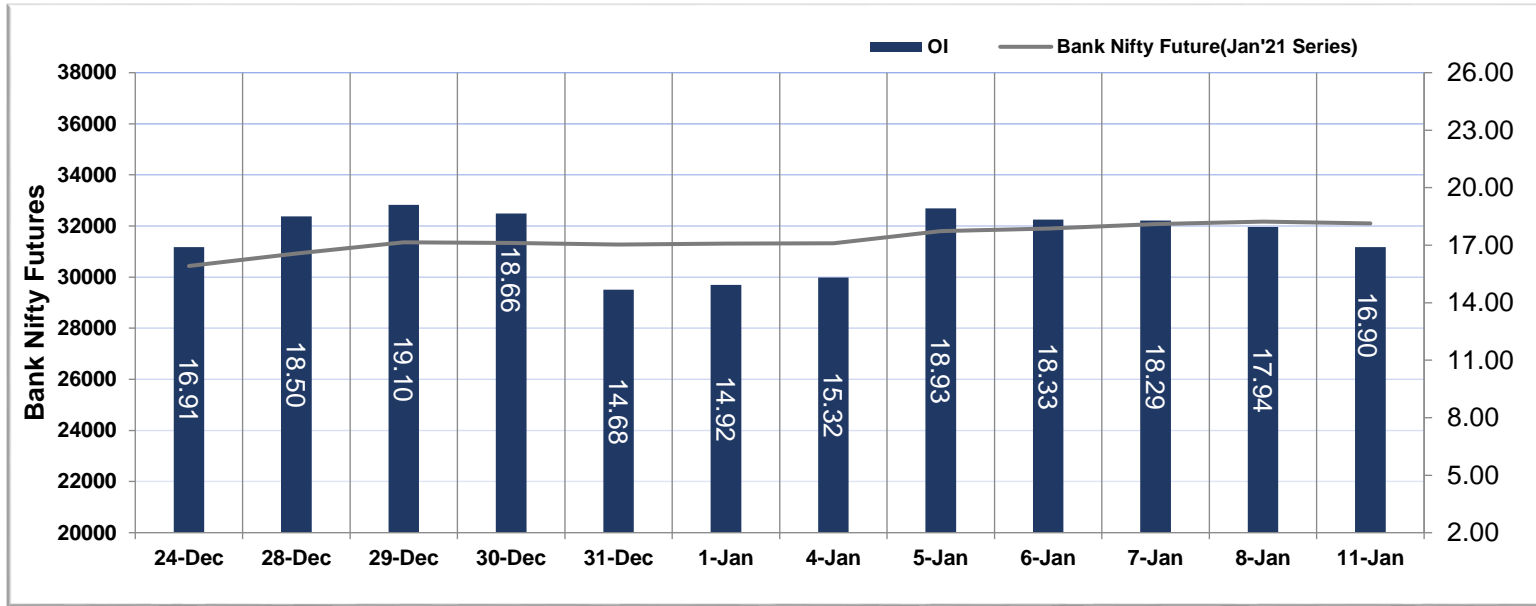


- Nifty Cash prices have settled at 14484.75 up by 0.96 percent from the previous close. On the upper side it has resistance of **14530** and **14610** levels, while lower side it has support of **14390** and **14250** levels. Intraday traders should be cautious and take position accordingly.

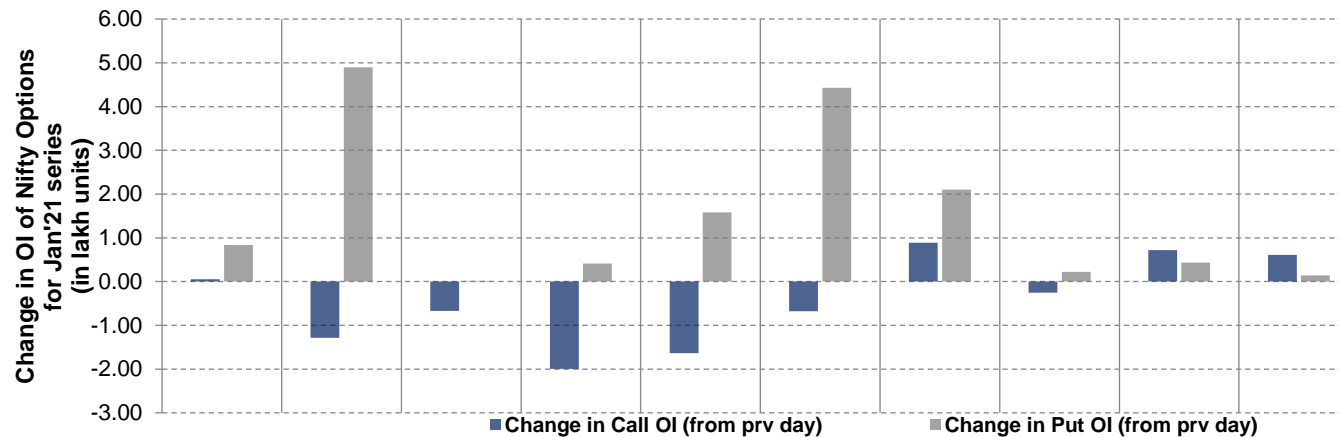
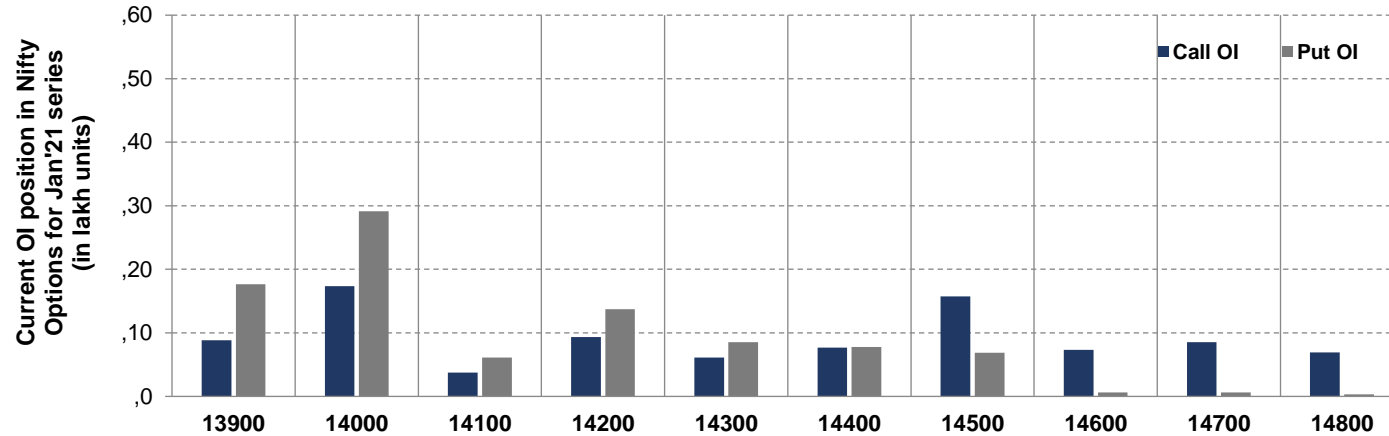
NIFTY FUTURES



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 0.13 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.50 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (1.73mn) and that for Puts was at 14,000 SP (2.91mn)

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