

Morning Mantra

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

ISO 9001 : 2015 Certified



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MARKET COMMENTARY

Indian equity benchmarks ended at fresh closing highs on Tuesday. After a cautious start, indices remained weak in the first half of the session, after the Reserve Bank of India (RBI) warned that the Indian banking system's bad loans may rise to a two-decade high on the back of COVID-19 induced stress. In its latest Financial Stability Report (FSR), the RBI said Public Sector Banks (PSBs) may see gross NPAs rise from 9.7 percent in September 2020 to 16.2 percent by September 2021. Market participants also got cautious, as the finance ministry has rejected the demand for further extension of the last date for income tax return (ITR) filing beyond February 15 for the ones where audit is required. In December 2020, the government extended the ITR filing deadline for individuals till January 10 and till February 15 for companies.

In the second half of the trading session, markets gained traction to end the trading day in green terrain, as ICRA Ratings in its latest report has said it expects India's real gross domestic product (GDP) to grow by 10.1 per cent in FY2022. However, it said the value of GDP in the next financial year will only mildly surpass the level that had been recorded in FY2020. Adding more optimism among traders, the Ministry of Finance has released the 11th 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.

On the global front, European markets were trading lower, as COVID-19 vaccination campaigns get underway and global markets come off a mild start to the trading week amid concerns of unsustainable valuations across asset classes. Asian markets ended mixed on Tuesday, even after Japan posted a current account surplus of 1,878.4 billion yen in November. The Ministry of Finance said that exceeded expectations for a surplus of 1,551 billion yen and was down from 2,144.7 billion yen in October. Exports were down 3.4 percent on year to 6.039 trillion yen, while imports sank an annual 13.6 percent to 5.423 trillion yen. The trade balance showed a surplus of 616.1 billion yen. The capital account showed a surplus of 2.1 billion yen and the financial account had a surplus of 1,593.3 billion yen.

MARKET SUMMARY

| Domestic Indices | Close | Points | % Change |
|------------------|----------|--------|----------|
| SENSEX | 49517.11 | 247.79 | 0.50 |
| NIFTY | 14563.45 | 78.70 | 0.54 |
| MIDCAP | 19208.60 | 84.30 | 0.44 |
| SMLCAP | 18922.73 | 46.29 | 0.25 |
| BSEFMC | 12676.03 | -57.25 | -0.45 |
| AUTO | 22840.09 | 278.74 | 1.24 |
| POWER | 2116.48 | -1.14 | -0.05 |
| REALTY | 2675.45 | 73.86 | 2.84 |
| BSE IT | 26761.03 | -11.99 | -0.04 |
| BANKEX | 36750.76 | 227.78 | 0.62 |
| OIL GAS | 15018.34 | 237.97 | 1.61 |
| METAL | 12593.60 | 81.33 | 0.65 |
| INDIA VIX | 22.85 | 0.47 | 2.08 |

ADVANCE-DECLINE

| Index | Advance | Decline | Unchanged |
|-------|---------|---------|-----------|
| NSE | 1035 | 911 | 69 |
| BSE | 1664 | 1435 | 154 |

MARKET TURNOVER (₹ in Crs)

| Segment | Current | Previous | Net % |
|----------|---------|----------|-------|
| BSE CASH | 4854 | 5044 | (4) |
| NSE CASH | 81906 | 72302 | 13 |
| NSE F&O | 2588858 | 2116223 | 22 |

KEY INDICES RATIOS

| INDEX | P/E | P/B | Dividend Yield |
|--------|-------|------|----------------|
| NIFTY | 39.94 | 4.13 | 1.09 |
| SENSEX | 34.55 | 3.39 | 0.80 |

FII & DII - CAPITAL MARKETS (₹ in Crs)

| FII-DII* | Buy | Sell | Net |
|----------|------|------|--------|
| DII | 5557 | 6891 | (1334) |
| FII | 9355 | 8783 | 571 |

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

| FII | Buy | Sell | Net |
|---------------|--------|--------|--------|
| Index Futures | 2954 | 4160 | (1206) |
| Index Options | 251810 | 253182 | (1372) |
| Stock Futures | 14672 | 14976 | (304) |
| Stock Options | 10941 | 10913 | 28 |

PUT-CALL RATIO

| Index | Current | Previous |
|------------|---------|----------|
| NIFTY | 1.73 | 1.80 |
| BANK NIFTY | 1.02 | 0.87 |

SECURITIES BAN FOR TRADE IN F&O FOR 13-01-2021

| |
|------|
| SAIL |
|------|

10-YEAR GOVERNMENT SECURITIES YIELD

| Country | Current | Previous | % Chg |
|---------|---------|----------|-------|
| INDIA | 5.933 | 5.924 | 0.15 |
| USA | 1.160 | 1.134 | 2.28 |

DOLLAR INDEX

| Dollar Index | Current | Previous | % Chg |
|--------------|---------|----------|-------|
| DXY | 90.41 | 90.46 | -0.07 |

CURRENCY FUTURES

| Expiry | Close | Chg Point | % Chg |
|--------------------|-------|-----------|-------|
| 27-Jan-21 USD-INR | 73.37 | -0.17 | -0.23 |
| 27-Jan-21 EUR-INR | 89.11 | -0.30 | -0.33 |
| 27-Jan-21 GBP-INR | 99.55 | 0.38 | 0.39 |
| 27-Jan-21 JPY- INR | 70.39 | -0.20 | -0.28 |

KEY COMMODITIES TRACKER

| Commodity | Current | Chg Point | % Chg |
|-------------|---------|-----------|-------|
| Gold | 1845.53 | -1.54 | -0.09 |
| Silver | 25.35 | 0.30 | 1.20 |
| Crude-Oil | 52.96 | 0.71 | 1.36 |
| Brent-Crude | 56.43 | 0.77 | 1.40 |

INDEX TREND ANALYSIS

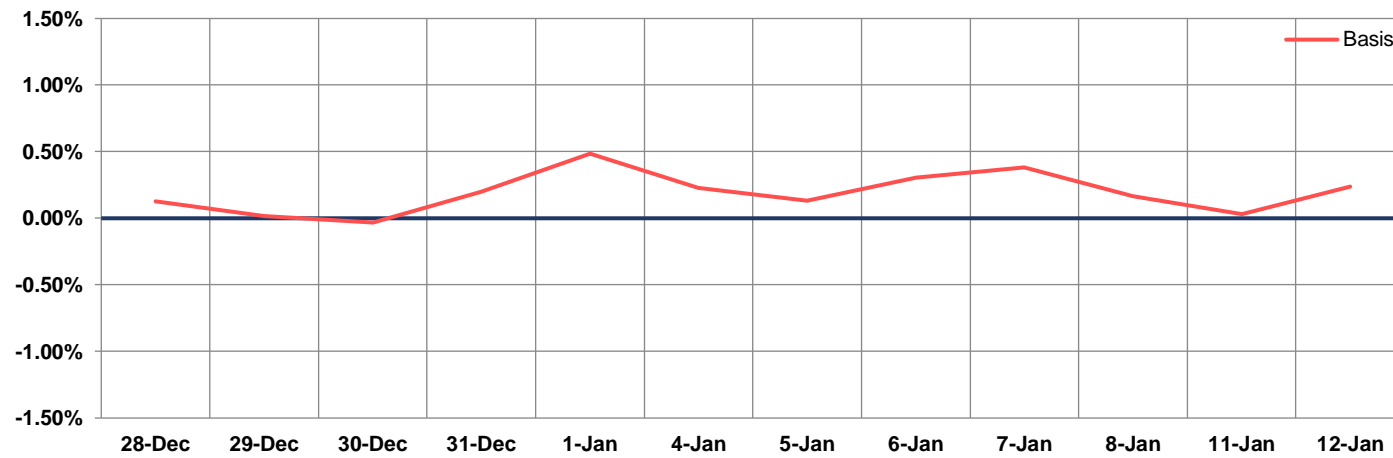
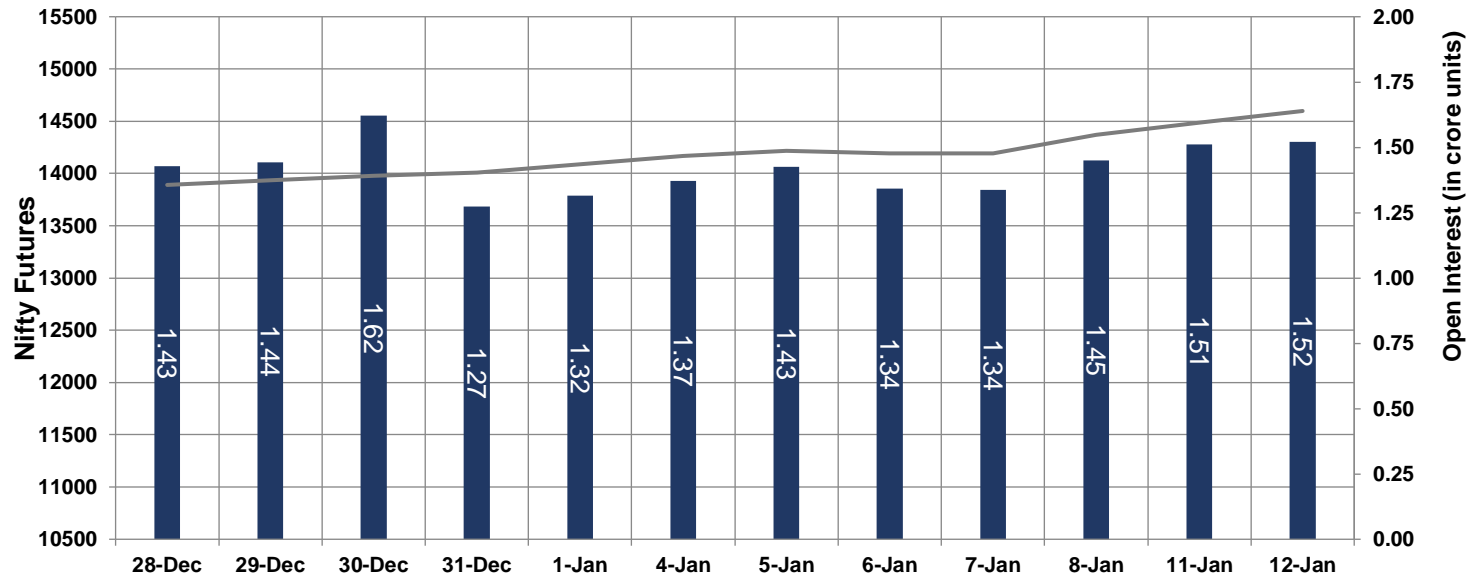
| INDEX | CLOSE | S2 | S1 | PIVOT | R1 | R2 | DAILY | WEEKLY | MONTHLY |
|---------------|-------|-------|-------|-------|-------|-------|-------|--------|---------|
| NIFTY | 14563 | 14371 | 14467 | 14529 | 14625 | 14687 | Buy | Buy | Buy |
| SENSEX | 49517 | 48899 | 49208 | 49389 | 49698 | 49878 | Buy | Buy | Buy |
| NIFTY FUTURES | 14600 | 14390 | 14495 | 14559 | 14664 | 14729 | Buy | Buy | Buy |
| BANK NIFTY | 32339 | 31482 | 31911 | 32154 | 32583 | 32826 | Buy | Buy | Buy |
| CNX IT | 26982 | 26649 | 26816 | 26971 | 27138 | 27294 | Buy | Buy | Buy |
| CNX MIDCAP | 22289 | 21888 | 22089 | 22236 | 22436 | 22583 | Buy | Buy | Buy |
| CNX SMALLCAP | 7447 | 7403 | 7425 | 7452 | 7474 | 7502 | Buy | Buy | Buy |

NIFTY TECHNICAL & INDICES LEVEL

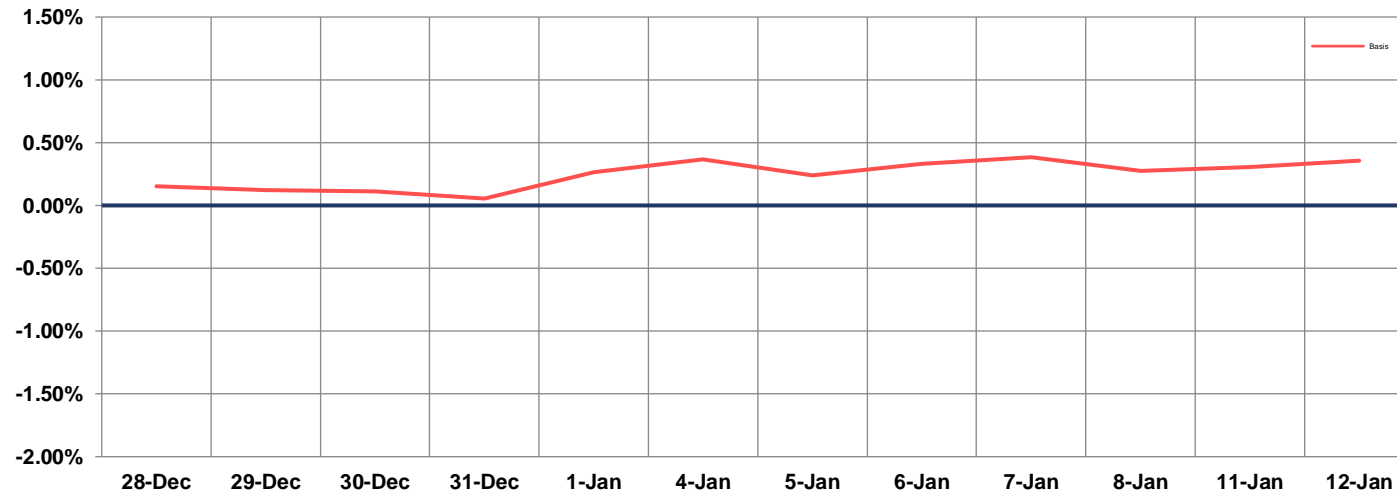
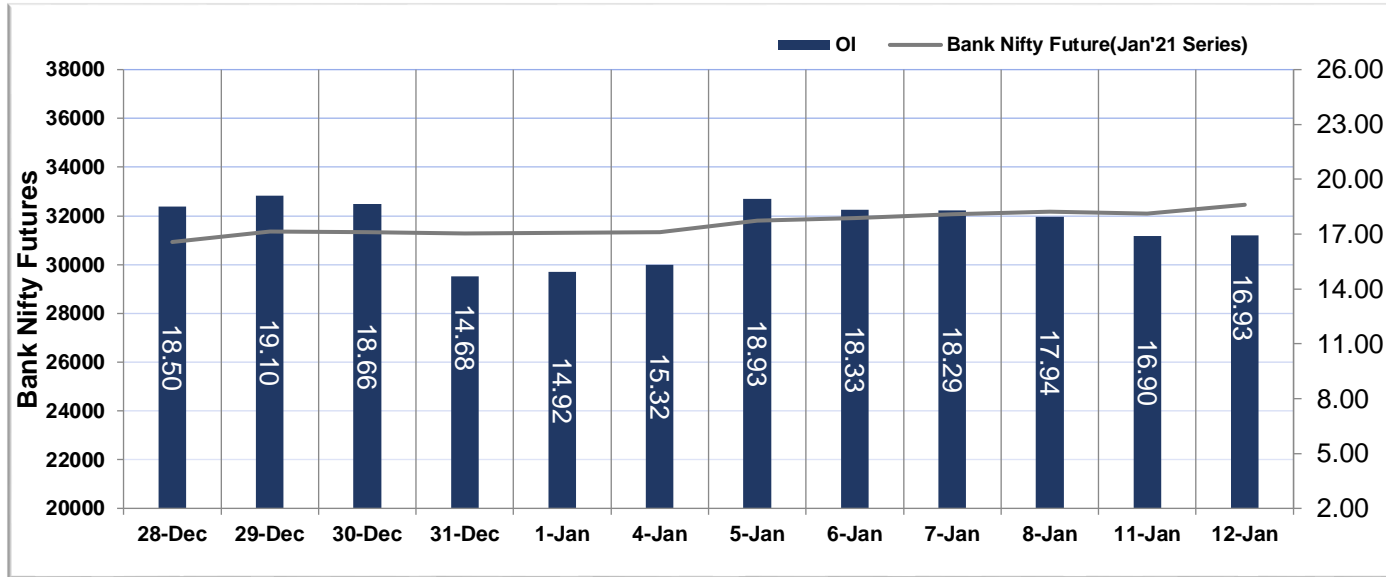


- Nifty Cash prices have settled at 14563.45 up by 0.54 percent from the previous close. On the upper side it has resistance of **14610** and **14680** levels, while lower side it has support of **14490** and **14360** levels. Intraday traders should be cautious and take position accordingly.

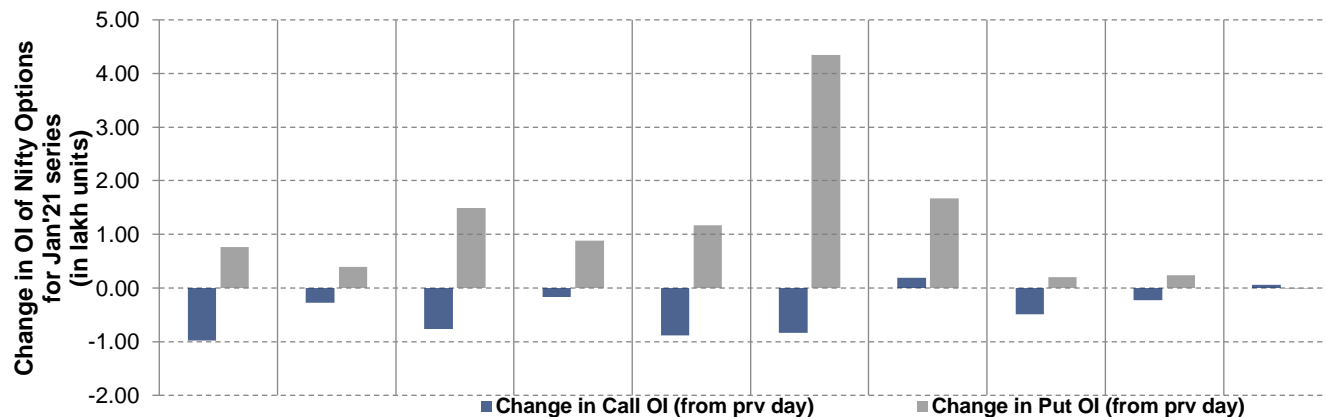
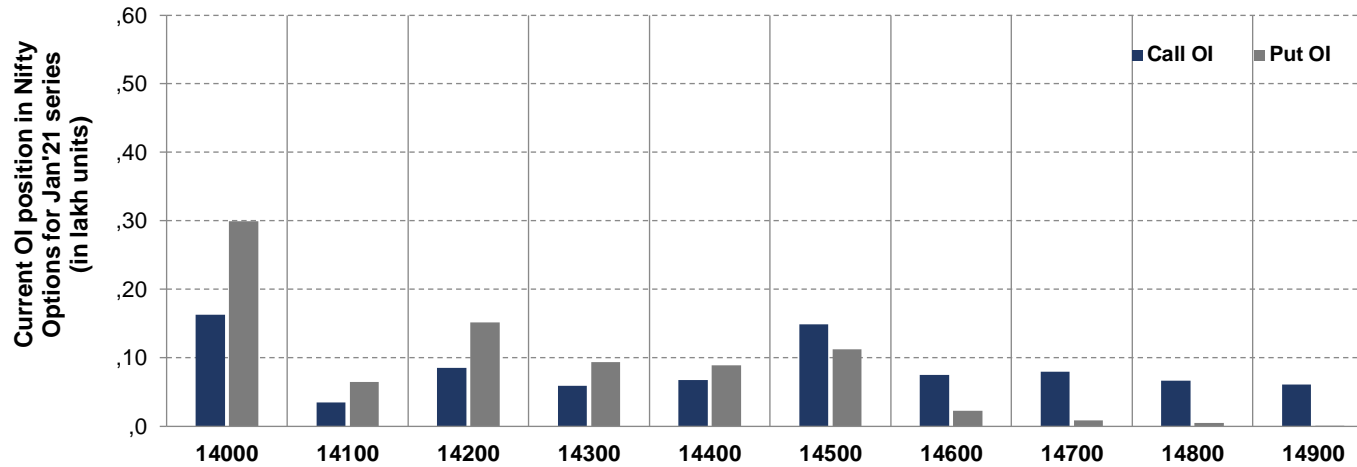
NIFTY FUTURES



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 0.08 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (1.63mn) and that for Puts was at 14,000 SP (2.99mn)

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