

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended flat on Wednesday. Indices made a positive start of the day, after the government data showed that Consumer Price Index (CPI)-based inflation eased to 4.59 per cent in December 2020 compared to 6.93 per cent in November. Food inflation declined to 3.41 per cent in December, compared to 9.5 per cent in the previous month. Besides, the Central Board of Direct Taxes (CBDT) has launched an automated dedicated e-portal on the e-filing website of the Department to receive and process complaints of tax evasion, foreign undisclosed assets as well as complaints regarding benami properties.

Markets cut all of their gains in late morning deals to turn negative, as traders got cautious, after the State Bank of India's (SBI) Ecowrap report has said India's fiscal deficit in the current financial year (FY21) is likely to reach 7.4 per cent of the GDP on the back of enhanced government expenditure amid the pandemic. The report noted that as per the first advanced estimate of the GDP, real GDP will contract by 7.7 per cent in FY21, and nominal GDP growth is expected at (-) 4.2 per cent. Accordingly, the nominal GDP for FY22 would grow by 15 per cent to Rs 224.04 lakh crore.

Sentiments remained negative during noon deals, as India's factory output or Index of Industrial Production (IIP) contracted 1.9 percent for November 2020 mainly due to poor showing by manufacturing and mining sectors. Industrial production of the country had grown at 3.6 per cent in October 2020 and 2.1 per cent in November 2019. However, in the last hour of the trade, indices staged recovery to end flat, amid report that a mega immunisation drive against Covid-19 has kicked off with nine flights transporting over 5.6 million doses of the vaccine to 13 cities across the country on Tuesday.

On the global front, European markets were trading mostly in green, as investors monitor vaccine rollouts and coronavirus containment measures. Asian market ended mostly higher on Wednesday, even after a measure of the public assessment of the Japanese economy decreased for the second month in a row in December. The survey data from the Cabinet Office showed that the current conditions index of the Economy Watchers' Survey, which measures the current situation of the economy, decreased to 35.5 in December from 45.6 in November. However, a reading below 50 suggests pessimism. The outlook index that signals future activity rose to 37.1 in December from 36.5 in the previous month. In October, the reading was 49.1.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49492.32	-24.79	-0.05
NIFTY	14564.85	1.40	0.01
MIDCAP	19087.59	-121.01	-0.63
SMLCAP	18850.66	-72.07	-0.38
BSEFMC	12730.18	54.15	0.43
AUTO	23030.89	190.80	0.84
POWER	2126.11	9.63	0.46
REALTY	2667.54	-7.91	-0.30
BSE IT	26882.67	121.64	0.45
BANDEX	36976.16	225.40	0.61
OIL GAS	15119.23	100.89	0.67
METAL	12624.24	30.64	0.24
INDIA VIX	23.29	0.45	1.94

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	664	1305	76
BSE	1209	1863	140

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8237	4854	70
NSE CASH	85509	81906	4
NSE F&O	4298485	2588858	66

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.94	4.13	1.09
SENSEX	34.65	3.40	0.80

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

FII-DII*	Buy	Sell	Net
DII	5777	8147	(2370)
FII	10264	8385	1879

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4094.72	5071.02	(976)
Index Options	514686.09	508726.14	5960
Stock Futures	15913.43	17198.59	(1285)
Stock Options	13014.05	13038.79	(25)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.46	1.73
BANK NIFTY	1.02	1.02

## SECURITIES BAN FOR TRADE IN F&O FOR 14-01-2021

BHEL
SAIL

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.950	5.931	0.32
USA	1.126	1.138	-1.08

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.33	90.09	0.26

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.30	-0.08	-0.11
27-Jan-21 EUR-INR	89.18	0.10	0.12
27-Jan-21 GBP-INR	100.08	0.47	0.47
27-Jan-21 JPY- INR	70.48	0.10	0.14

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1857.34	-1.37	-0.07
Silver	25.48	-0.17	-0.66
Crude-Oil	53.08	-0.13	-0.24
Brent-Crude	56.27	-0.32	-0.57

## INDEX TREND ANALYSIS

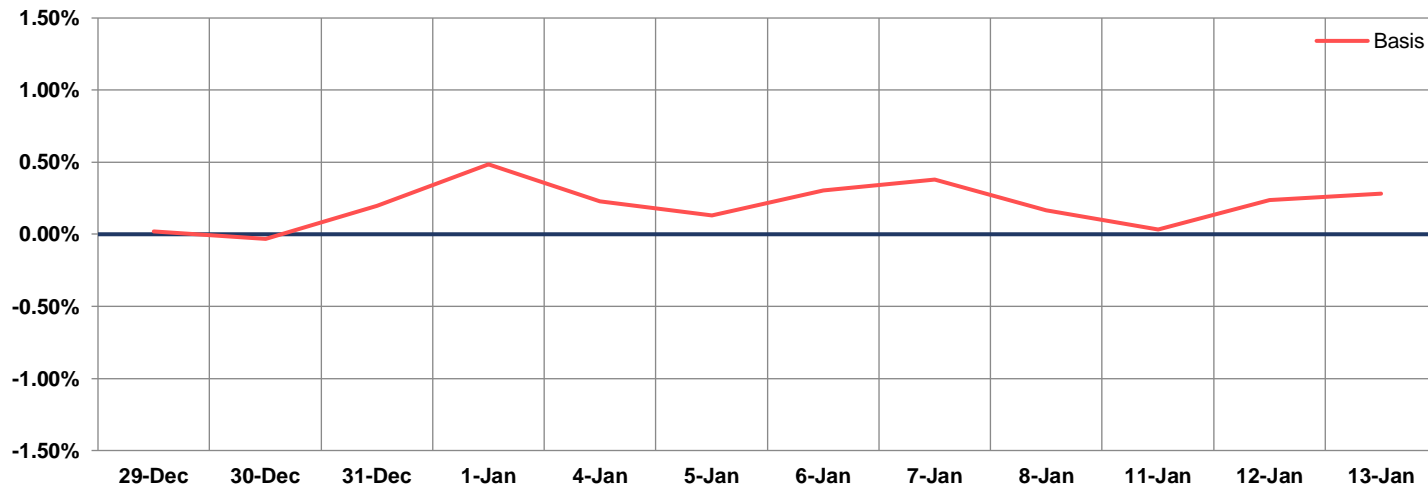
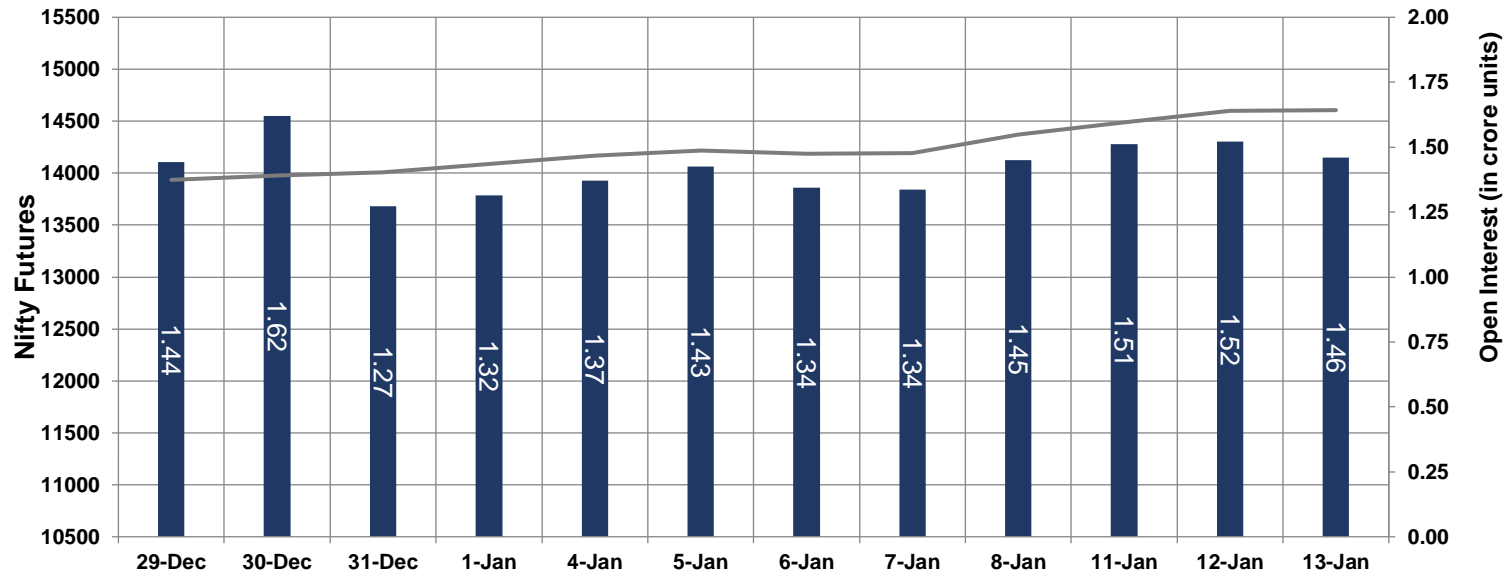
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14565	14334	14449	14551	14667	14769	Buy	Buy	Buy
SENSEX	49492	48732	49112	49454	49834	50175	Buy	Buy	Buy
NIFTY FUTURES	14591	14392	14491	14576	14675	14760	Buy	Buy	Buy
BANK NIFTY	32575	31933	32254	32469	32789	33004	Buy	Buy	Buy
CNX IT	27004	26582	26793	26948	27160	27315	Buy	Buy	Buy
CNX MIDCAP	22155	21514	21835	22170	22490	22825	Buy	Buy	Buy
CNX SMALLCAP	7434	7271	7352	7435	7516	7598	Buy	Buy	Buy

## NIFTY TECHNICAL & INDICES LEVEL

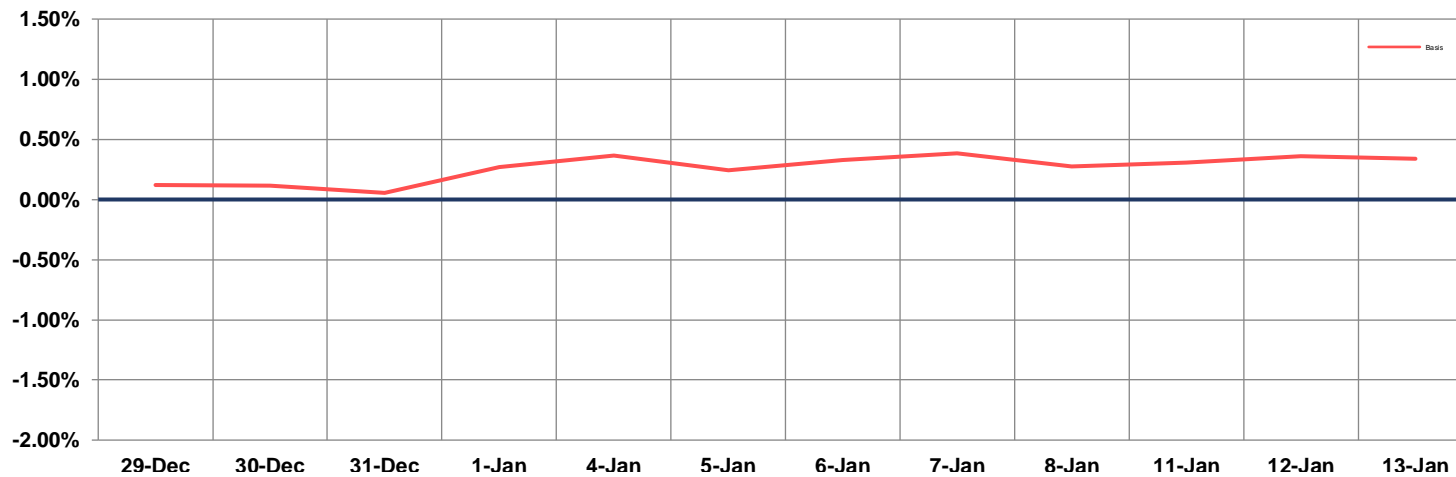
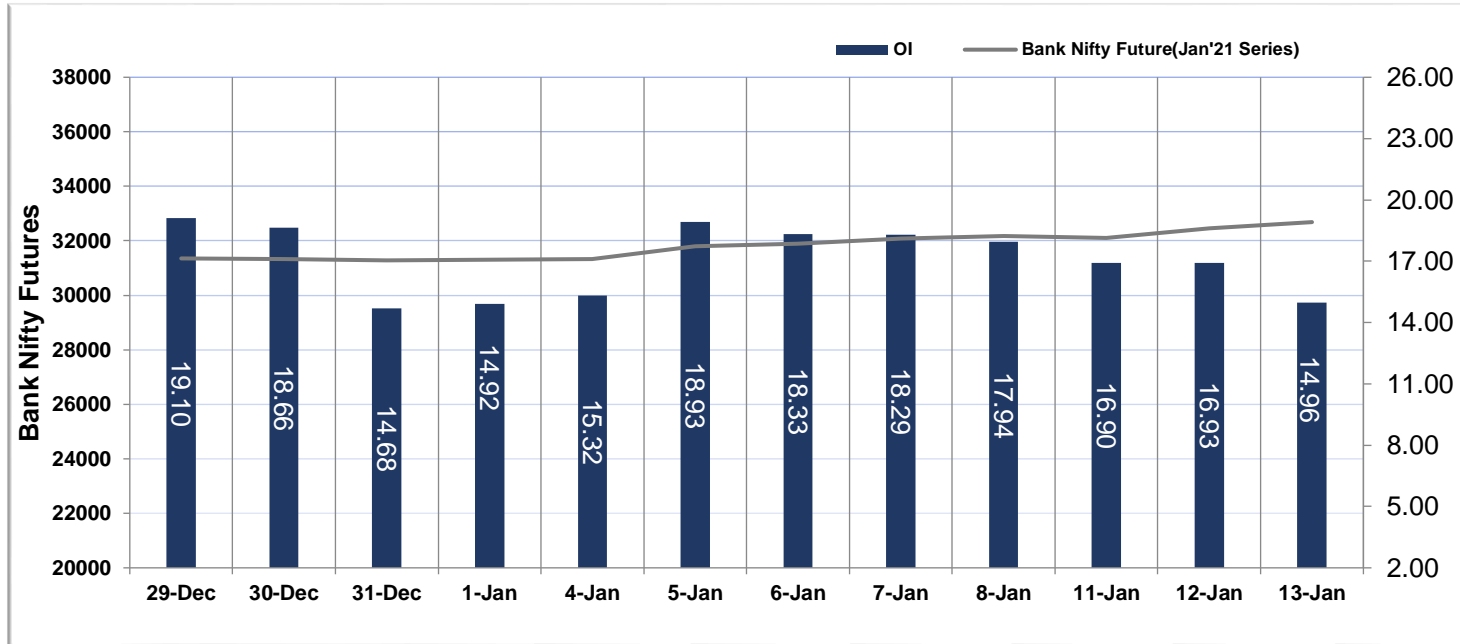


- Nifty Cash prices have settled at 14564.85 marginally up by 0.01 percent from the previous close. On the upper side it has resistance of **14670** and **14730** levels, while lower side it has support of **14430** and **14360** levels. Intraday traders should be cautious and take position accordingly.

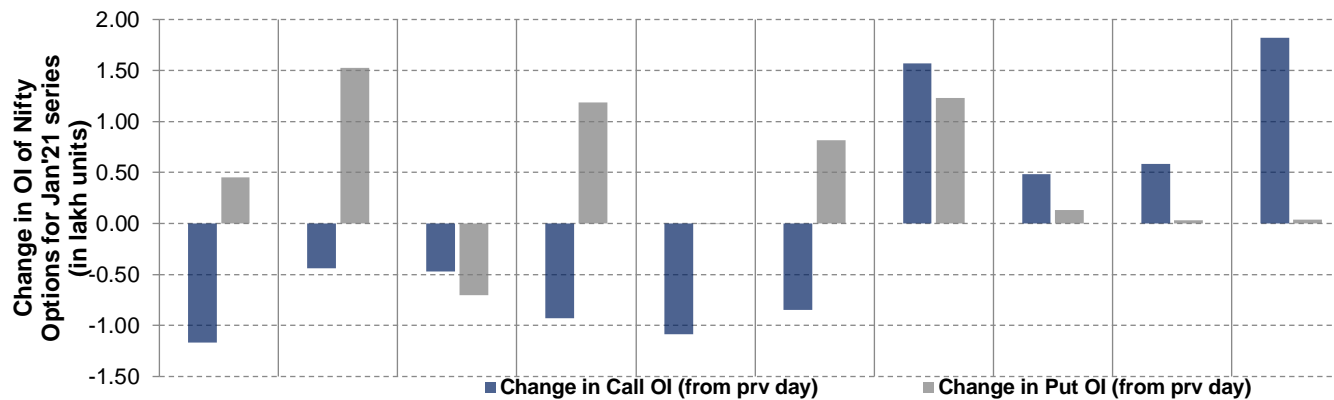
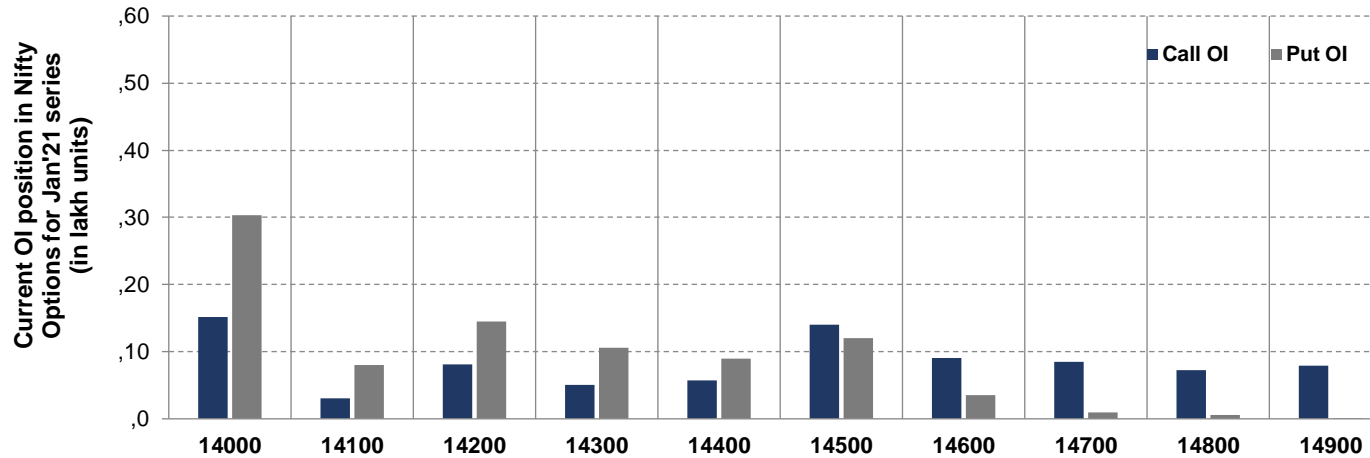
## NIFTY FUTURES



## 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 0.12 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.04 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (1.52mn) and that for Puts was at 14,000 SP (3.04mn)



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