

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks witnessed sharp fall on Friday. After a cautious start, markets remained weak during whole day, as rating agency CRISIL's report which projected CPI Inflation at 6.4% for fiscal 2021 (FY21). It mentioned that after eight months above the Reserve Bank of India (RBI's) target band of 2-6%, Consumer Price Index (CPI) inflation was finally back in range, declining for the second straight month to a below-consensus 4.6% in December, from 6.9% in November. Average CPI inflation during April-December now measures 6.6%, down from the April-November average of 6.9%. Traders failed to take solace with report that Prime Minister Narendra Modi will launch India's Covid-19 vaccination drive tomorrow via video conferencing. This will be the world's largest vaccination programme covering the entire length and breadth of the country.

In the last hours of the trading session, key indices added more losses and ended the trading day in red terrain, on the back of negative cues from the global markets. Market participants were seen taking a note of reports that Former Reserve Bank of India (RBI) Governor Raghuram Rajan says the government should take advantage of the peaks in the Indian equity markets right now and sell stakes in PSUs while prioritising spending to get the economy back on track. He said the upcoming Budget for the fiscal year beginning April 1 should look to provide 'relief to the poorer households and small and medium enterprises.' Meanwhile, the government has notified a modified scheme to provide financial assistance to distilleries producing first-generation ethanol from feedstocks, including cereals.

On the global front, European markets were trading lower with investors weighing increased Covid-related restrictions with the announcement of additional US stimulus. Asian markets ended mostly lower on Friday, even after the Bank of Japan upgraded its economic assessment of three out of nine regions and downgraded one. Many regions, while noting that their economy had been in a severe situation due to the impact of the novel coronavirus, there were signs of picking up. However, the impact of a resurgence of Covid-19 had been pointed out recently, primarily in the services industry, the bank noted. The bank raised the assessment of Hokuriku, Shikoku and Kyushu- Okinawa regions and lowered its view on Hokkaido. Meanwhile, assessment of all other five regions, namely Tohoku, Kanto-Koshinetsu, Tokai, Kinki and Chugoku were left unchanged.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49034.67	-549.49	-1.11
NIFTY	14433.70	-161.90	-1.11
MIDCAP	18904.14	-238.86	-1.25
SMLCAP	18682.12	-200.11	-1.06
BSEFMC	12753.00	-84.67	-0.66
AUTO	22961.57	-137.38	-0.59
POWER	2114.24	-28.32	-1.32
REALTY	2619.33	-47.29	-1.77
BSE IT	26352.98	-519.10	-1.93
BANKEK	36540.47	-363.56	-0.99
OIL GAS	14955.78	-372.46	-2.43
METAL	12345.75	-122.43	-0.98
INDIA VIX	24.01	0.98	4.26

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	518	1425	87
BSE	1023	2001	139

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5096	5684	(10)
NSE CASH	75312	70351	7
NSE F&O	2275797	6292127	(64)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.34	4.09	1.10
SENSEX	34.12	3.35	0.81

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4914	5856	(942)
FII	7241	6270	971

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3779.34	4842.66	(1063)
Index Options	293136.97	292519.75	617
Stock Futures	14230.07	15162.14	(932)
Stock Options	10901.01	11165.22	(264)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.19	1.47
BANK NIFTY	0.88	1.00

SECURITIES BAN FOR TRADE IN F&O FOR 18-01-2021

BHEL
IDEA
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.988	5.988	0.00
USA	1.095	1.129	-2.98

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.64	90.24	0.44

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.13	0.00	0.00
27-Jan-21 EUR-INR	88.79	-0.13	-0.15
27-Jan-21 GBP-INR	99.80	0.00	0.00
27-Jan-21 JPY- INR	70.56	0.22	0.31

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1831.95	-14.90	-0.81
Silver	24.80	-0.76	-2.98
Crude-Oil	52.43	-1.14	-2.11
Brent-Crude	55.19	-1.25	-2.20

INDEX TREND ANALYSIS

INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14434	14210	14322	14470	14581	14729	Buy	Buy	Buy
SENSEX	49035	48301	48668	49162	49529	50023	Buy	Buy	Buy
NIFTY FUTURES	14460	14238	14349	14486	14597	14735	Buy	Buy	Buy
BANK NIFTY	32247	31778	32013	32279	32513	32779	Buy	Buy	Buy
CNX IT	26363	25831	26097	26567	26833	27304	Buy	Buy	Buy
CNX MIDCAP	21934	21408	21671	21984	22247	22560	Buy	Buy	Buy
CNX SMALLCAP	7402	7254	7328	7429	7503	7604	Buy	Buy	Buy

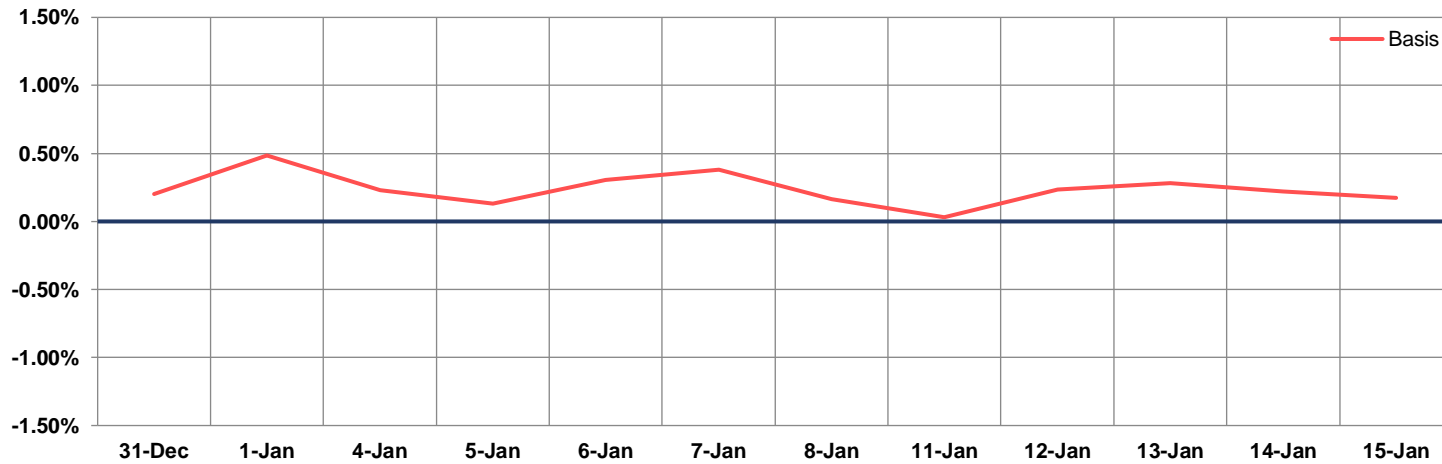
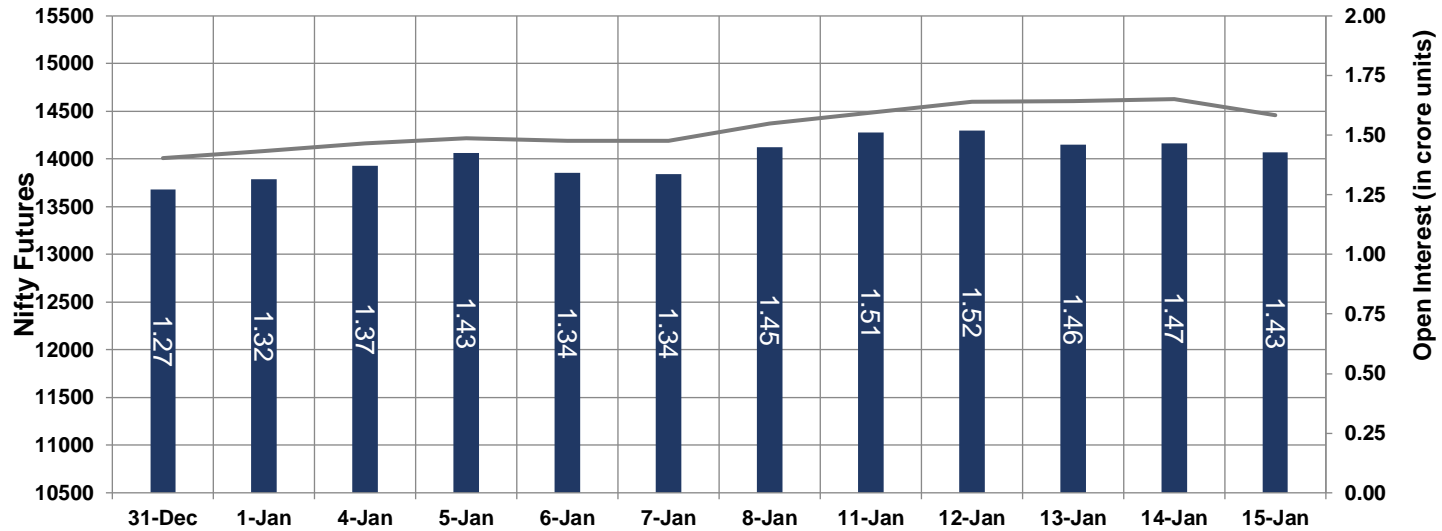
NIFTY TECHNICAL & INDICES LEVEL

1-Nifty 50 - 15/01/21
Avg Avg

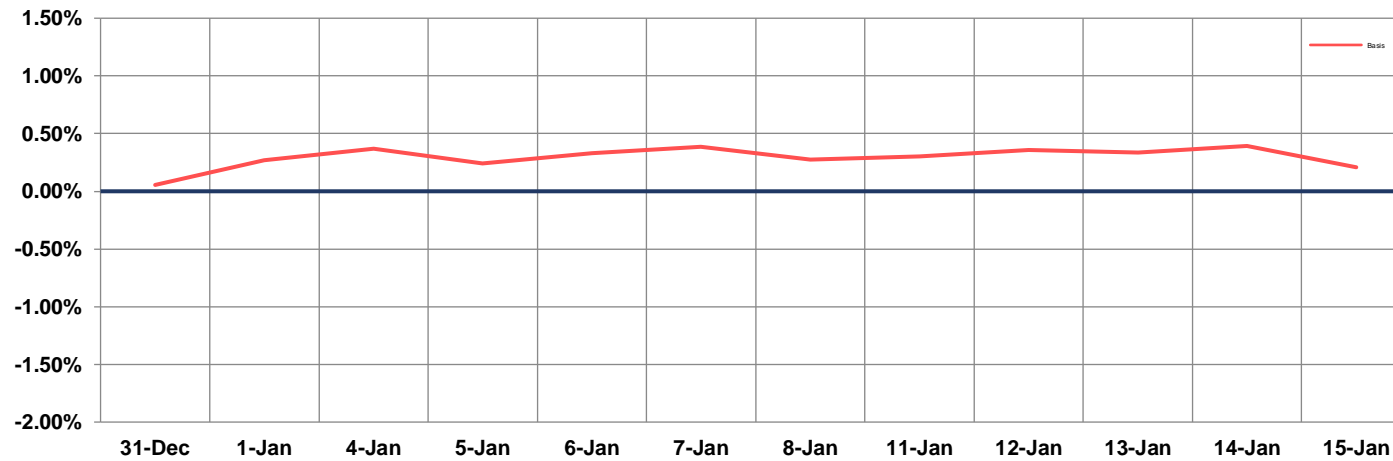
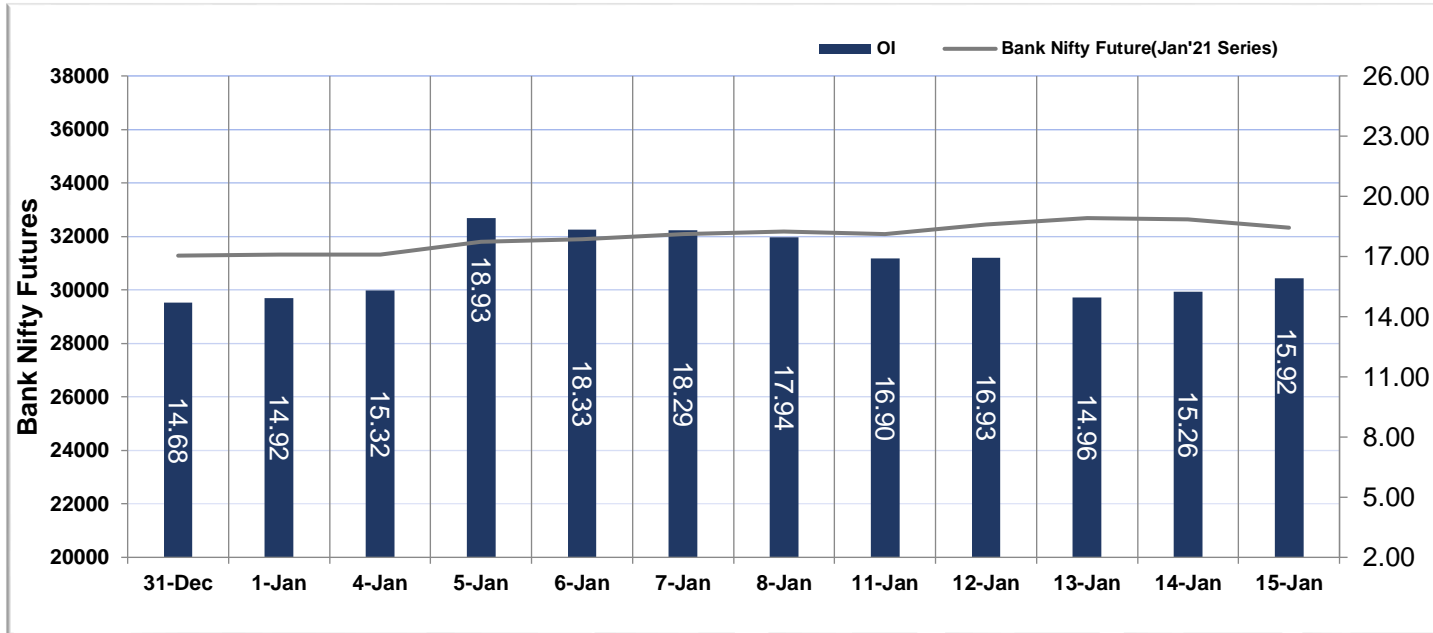


➤ Nifty Cash prices have settled at 14433.70 down by 1.11 percent from the previous close. On the upper side it has resistance of **14580** and **14640** levels, while lower side it has support of **14360** and **14250** levels. Intraday traders should be cautious and take position accordingly.

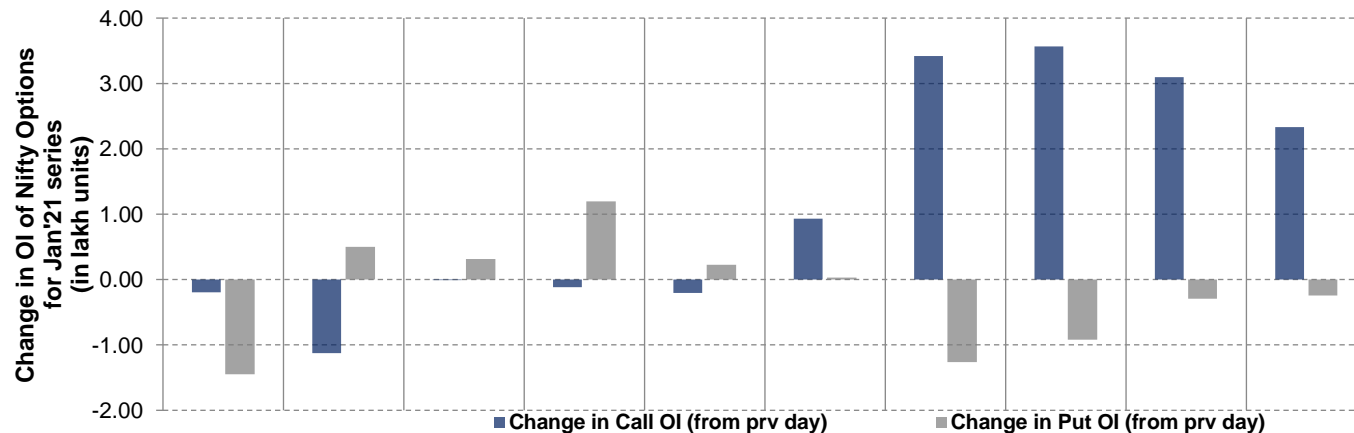
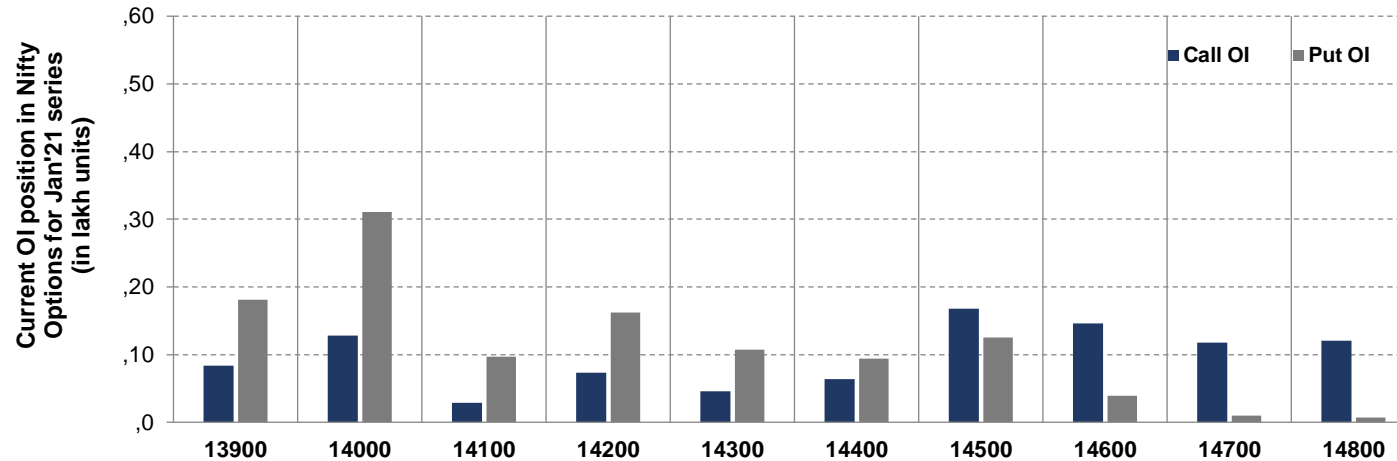
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,500 SP from the Jan month expiry was the most active call with an addition of 0.34 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.05 million in open interests.
- The maximum OI outstanding for Calls was at 14,500 SP (1.68mn) and that for Puts was at 14,000 SP (3.11mn)

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