

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 Wednesday's trading session. The start of the day was on a positive note, after investment through participatory notes (P-notes) in the domestic capital market rose to a 31-month high of Rs 87,132 crore at December-end, reflecting the bullish stance of FPIs. According to Securities and Exchange Board of India (Sebi) data, the value of P-note investments in Indian markets - equity, debt, and hybrid securities - increased to Rs 87,132 crore till December-end from Rs 83,114 crore at the November-end.

Markets maintained gaining rally during whole day, as markets regulator Sebi extended relaxations for companies with regards to compliance with procedural norms pertaining to rights issues opening till March 31 amid the ongoing coronavirus pandemic. Earlier, this relaxation was given for rights issues opening till July 31, 2020, which was further extended till December 31, 2020. Besides, the government is considering to tweak norms for e-commerce companies having foreign direct investment (FDI) to prohibit them from selling products of vendors in which these online marketplaces or their parent firms hold stake indirectly.

In the last hours of the trading session, key indices added more gains to end the day on a fabulous note, after Union Minister Piyush Goyal has said that Logistics team in the Ministry of Commerce and Industry is trying to integrate various means of transport, documentation & stakeholders through technology platforms, into a much-simplified way of working, which will enhance the Ease of Doing Business. Besides, Goyal said that this will truly give confidence to business community & stakeholders in logistics that Center & States are working as team.

On the global front, European markets were trading mostly in green. Asian markets ended mostly higher on Wednesday, after China's benchmark lending rates were left unchanged as widely expected. The one-year loan prime rate was retained at 3.85 percent and the five-year loan prime rate was maintained at 4.65 percent. The one-year and five-year loan prime rates were last lowered in April 2020. The one-year loan prime rate was cut by 20 basis points and five-year rate by 10 basis points in April.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49792.12	393.83	0.80
NIFTY	14644.70	123.55	0.85
MIDCAP	19156.32	204.26	1.08
SMLCAP	18743.39	108.42	0.58
BSEFMC	12737.17	-25.73	-0.20
AUTO	23372.07	499.16	2.18
POWER	2129.20	3.08	0.14
REALTY	2679.46	4.70	0.18
BSE IT	26566.23	457.31	1.75
BANKEX	36836.73	106.54	0.29
OIL GAS	14978.58	46.62	0.31
METAL	12294.33	103.59	0.85
INDIA VIX	21.55	-1.35	-5.88

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	996	932	89
BSE	1541	1473	161

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4456	3577	25
NSE CASH	65704	61864	6
NSE F&O	3342185	2694873	24

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.55	4.15	1.08
SENSEX	34.42	3.39	0.80

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5085	5949	(864)
FII	7701	5412	2289

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3070.02	4383.50	(1313)
Index Options	357042.21	357702.90	(661)
Stock Futures	10460.01	10792.58	(333)
Stock Options	12011.24	12052.85	(42)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.44	1.36
BANK NIFTY	0.93	0.94

SECURITIES BAN FOR TRADE IN F&O FOR 21-01-2021

IDEA
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.943	5.936	0.12
USA	1.101	1.092	0.79

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.45	90.49	-0.05

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	73.08	-0.12	-0.16
27-Jan-21 EUR-INR	88.53	-0.25	-0.28
27-Jan-21 GBP-INR	99.98	0.33	0.33
27-Jan-21 JPY- INR	70.44	0.06	0.08

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1867.70	26.42	1.43
Silver	25.71	0.48	1.91
Crude-Oil	53.56	0.59	1.11
Brent-Crude	56.60	0.62	1.17

INDEX TREND ANALYSIS

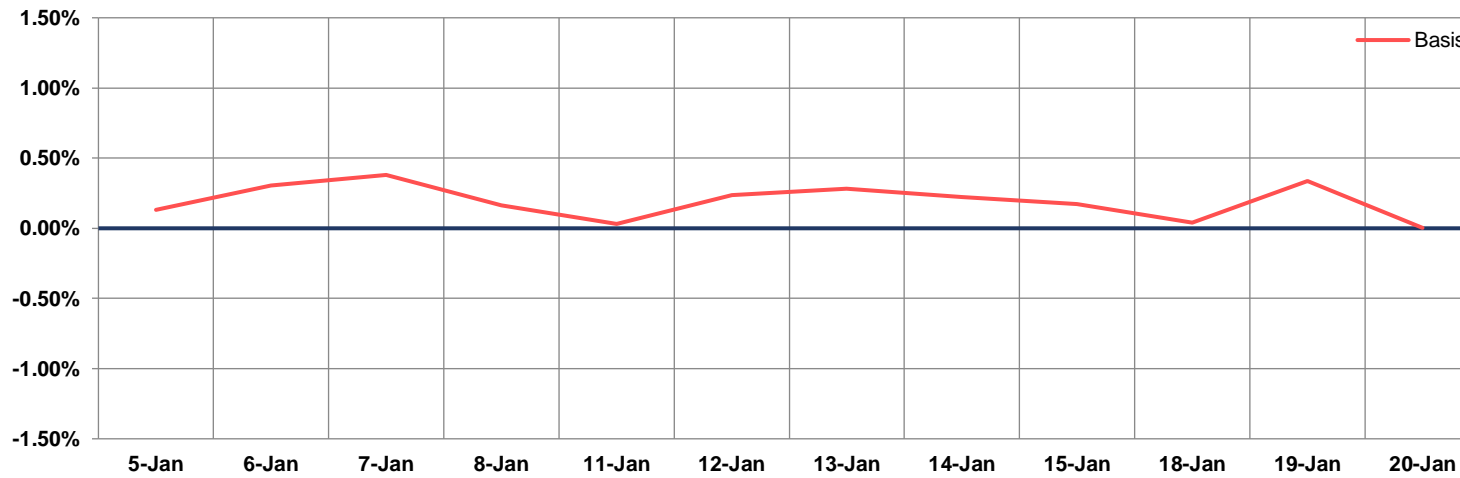
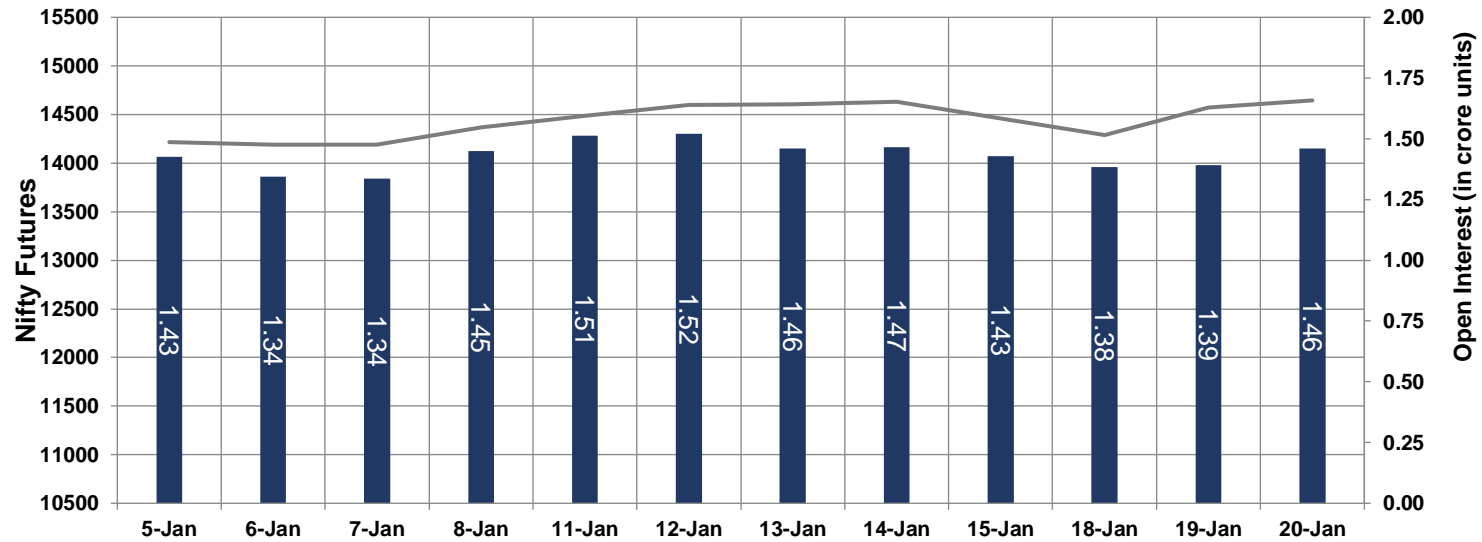
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14645	14461	14553	14610	14702	14758	Buy	Buy	Buy
SENSEX	49792	49179	49856	49680	49986	50181	Buy	Buy	Buy
NIFTY FUTURES	14633	14463	14548	14609	14694	14755	Buy	Buy	Buy
BANK NIFTY	32544	32207	32375	32491	32660	32776	Buy	Buy	Buy
CNX IT	26620	25892	26256	26507	26871	27122	Buy	Buy	Buy
CNX MIDCAP	22197	21877	22037	22126	22286	22375	Buy	Buy	Buy
CNX SMALLCAP	7439	7397	7418	7444	7465	7491	Buy	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

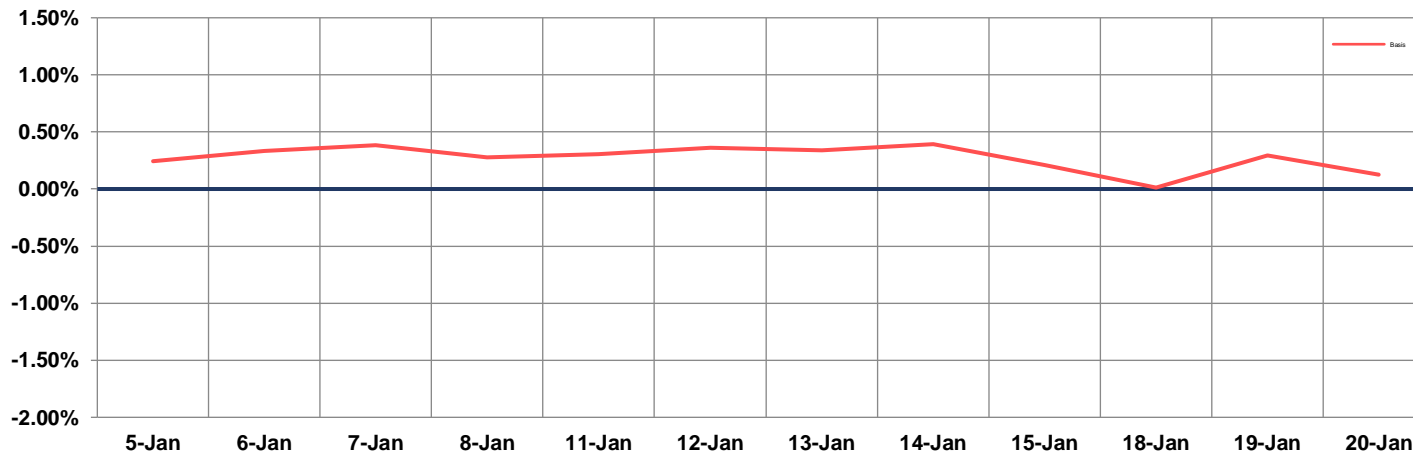
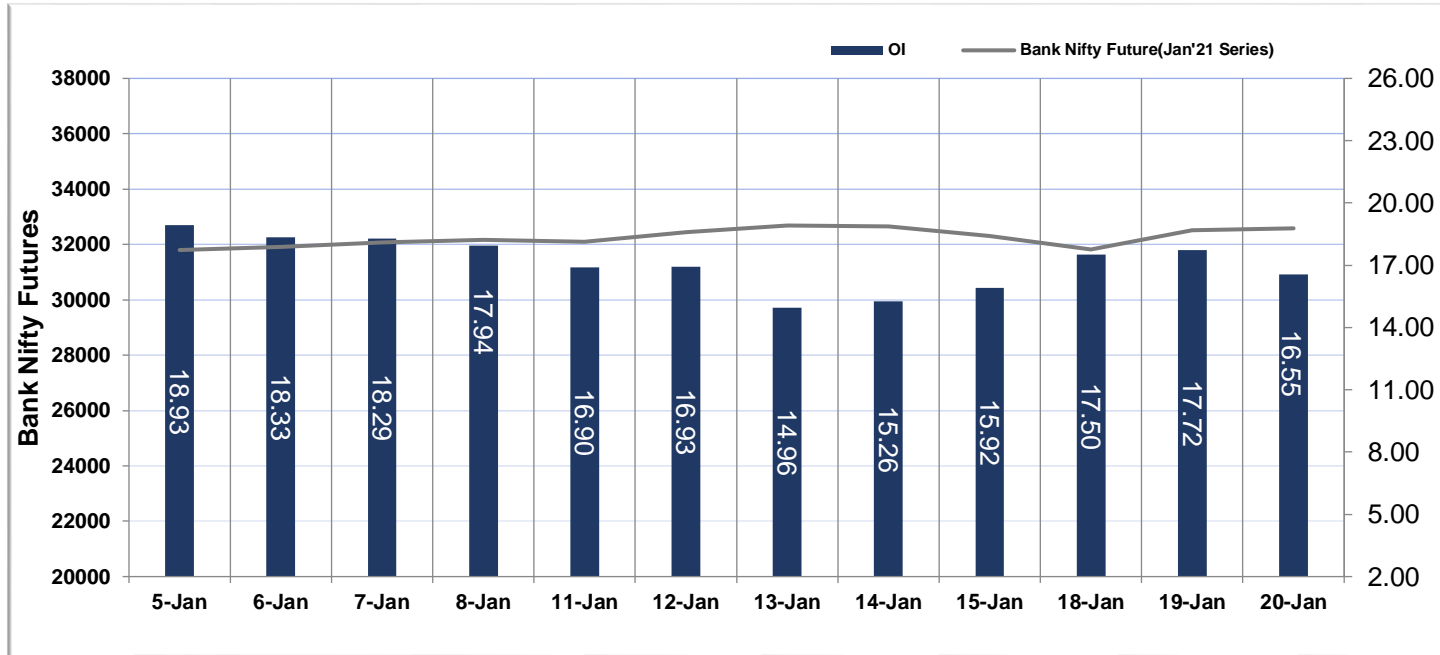


➤ Nifty Cash prices have settled at 14644.70 up by 0.85 percent from the previous close. On the upper side it has resistance of **14720** and **14850** levels, while lower side it has support of **14550** and **14480** levels. Intraday traders should be cautious and take position accordingly.

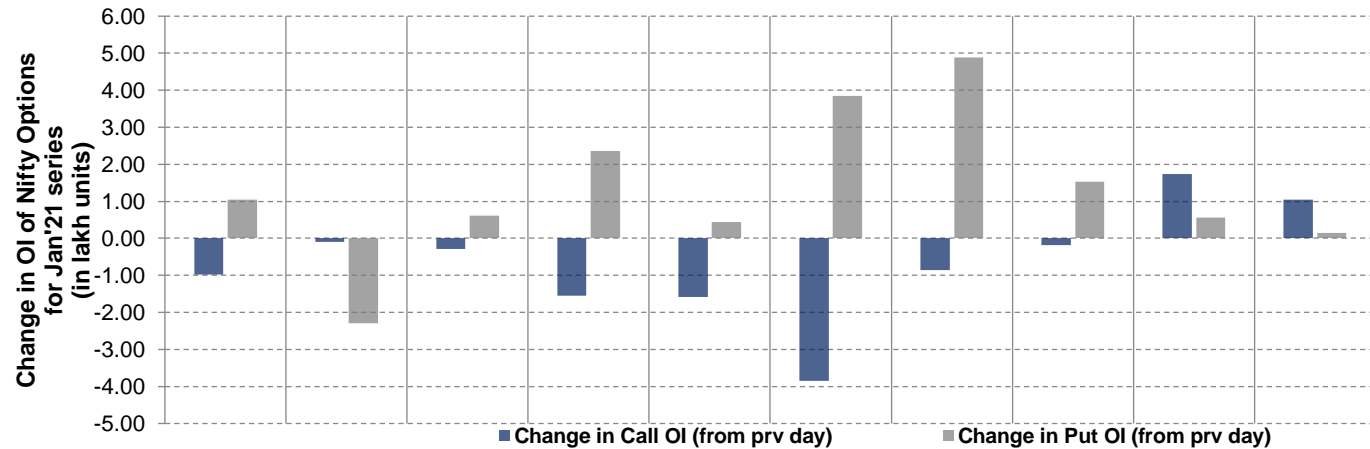
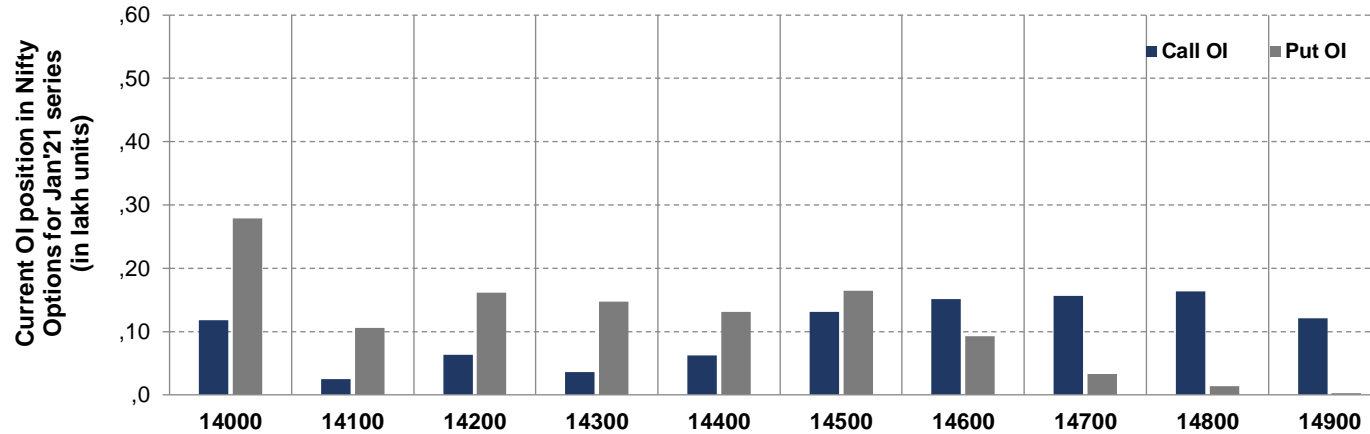
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,800 SP from the Jan month expiry was the most active call with an addition of 0.20 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.10 million in open interests.
- The maximum OI outstanding for Calls was at 14,800 SP (1.64mn) and that for Puts was at 14,000 SP (2.80mn)

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