

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks remained under a grip of bears on Friday's trading session, with both the Sensex and the Nifty ending in deep red. Key indices made a cautious start of the trading day, as India recorded 13,701 fresh cases of the coronavirus disease (Covid-19). The total number of active cases in the country has fallen to 10,625,420, while the caseload tally stands at 10,625,420. Globally, more than 98 million people have been infected by the virus. The country continues to be second-most-affected globally, and ranks 13th among worst-hit nations by active cases.

Markets remained weak for the whole day, on the back of negative cues from other Asian markets. Traders overlooked reports that even as India's hiring activities declined last year due to the coronavirus pandemic, there is a sudden increase in demand with about 53 per cent of companies saying they are planning to increase their headcounts in 2021. The pandemic adversely impacted economies across Asia-Pacific, including India, which had entered 2020 with robust hiring activities, according to professional recruitment services firm Michael Page India's 'Talent Trends 2021 Report'.

In noon deals, markets extended losses to end near their intraday low points. The street was cautious after credit rating agency, India Ratings and Research (Ind-Ra) in its latest report has said that the major focus of the government to revive the COVID-19 battered economy has till now been on the supply side, but it is high time to change gears and focus on the demand side as well, lest the ongoing recovery begins to lose steam. As per the agency, the absence of adequate demand may jeopardise the recovery and may even lead to a second-round impact.

On the global front, European markets were trading lower hit by tighter travel restrictions in the euro zone and weak UK retail sales numbers, while investors awaited the latest batch of business activity data to gauge the pace of recovery from the coronavirus crisis. Asian markets ended mostly lower on Friday, after Singapore house prices increased at a faster pace in the fourth quarter. The Urban Redevelopment Authority reported that house prices grew 2.1 percent on a yearly basis, faster than the 0.8 percent increase seen in the previous quarter. However, in 2020 as a whole, house price inflation slowed to 2.2 percent from 2.7 percent in 2019.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48878.54	-746.22	-1.50
NIFTY	14371.90	-218.45	-1.50
MIDCAP	18761.87	-226.45	-1.19
SMLCAP	18422.05	-193.05	-1.04
BSEFMC	12668.59	-23.10	-0.18
AUTO	23705.20	347.18	1.49
POWER	2092.40	-25.01	-1.18
REALTY	2535.43	-75.38	-2.89
BSE IT	26412.50	7.74	0.03
BANKEK	35379.59	-1106	-3.03
OIL GAS	14512.24	-225.31	-1.53
METAL	11545.60	-452.35	-3.77
INDIA VIX	22.42	0.24	1.09

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	475	1468	80
BSE	979	2005	133

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5251	5479	(4)
NSE CASH	83590	81117	3
NSE F&O	3126119	6906327	(55)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	38.86	4.07	1.10
SENSEX	33.76	3.32	0.81

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4860	6150	(1290)
FII	8327	8962	(636)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5613.93	7085.22	(1471)
Index Options	431046.68	432539.10	(1492)
Stock Futures	28891.61	29358.62	(467)
Stock Options	18465.83	18623.84	(158)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.14	1.29
BANK NIFTY	0.63	0.85

SECURITIES BAN FOR TRADE IN F&O FOR 25-01-2021

NATIONALUM
PNB
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.939	5.956	-0.29
USA	1.094	1.107	-1.17

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.21	90.13	0.09

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	72.97	-0.06	-0.08
27-Jan-21 EUR-INR	88.87	0.26	0.29
27-Jan-21 GBP-INR	100.06	-0.10	-0.10
27-Jan-21 JPY- INR	70.50	-0.11	-0.15

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1854.91	-14.71	-0.79
Silver	25.42	-0.50	-1.94
Crude-Oil	52.08	-1.05	-1.98
Brent-Crude	55.21	-0.89	-1.59

INDEX TREND ANALYSIS

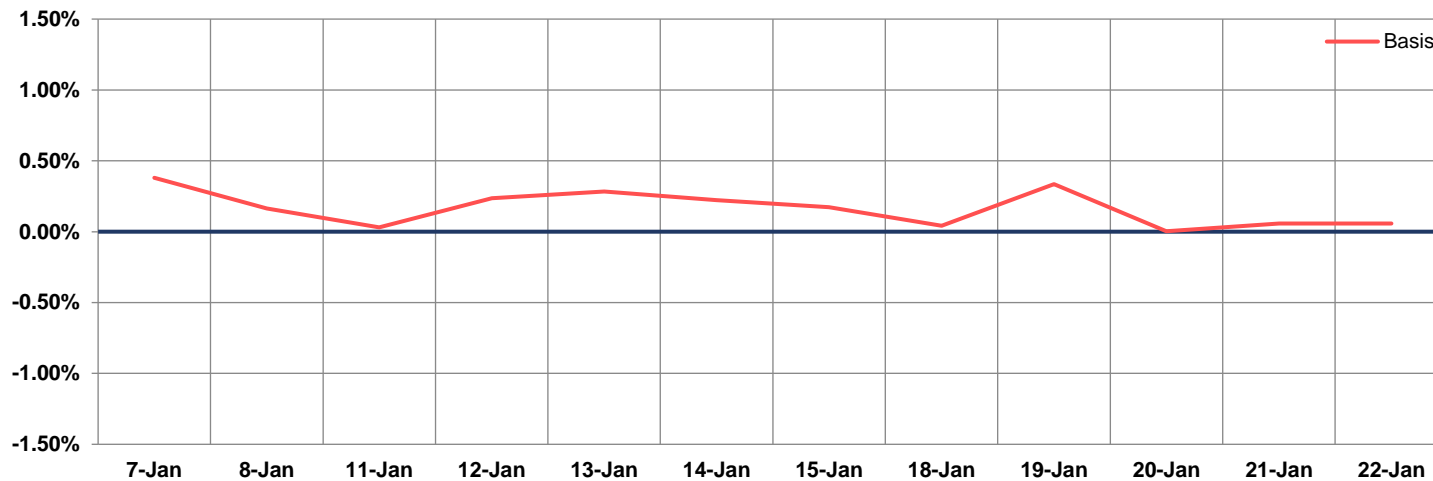
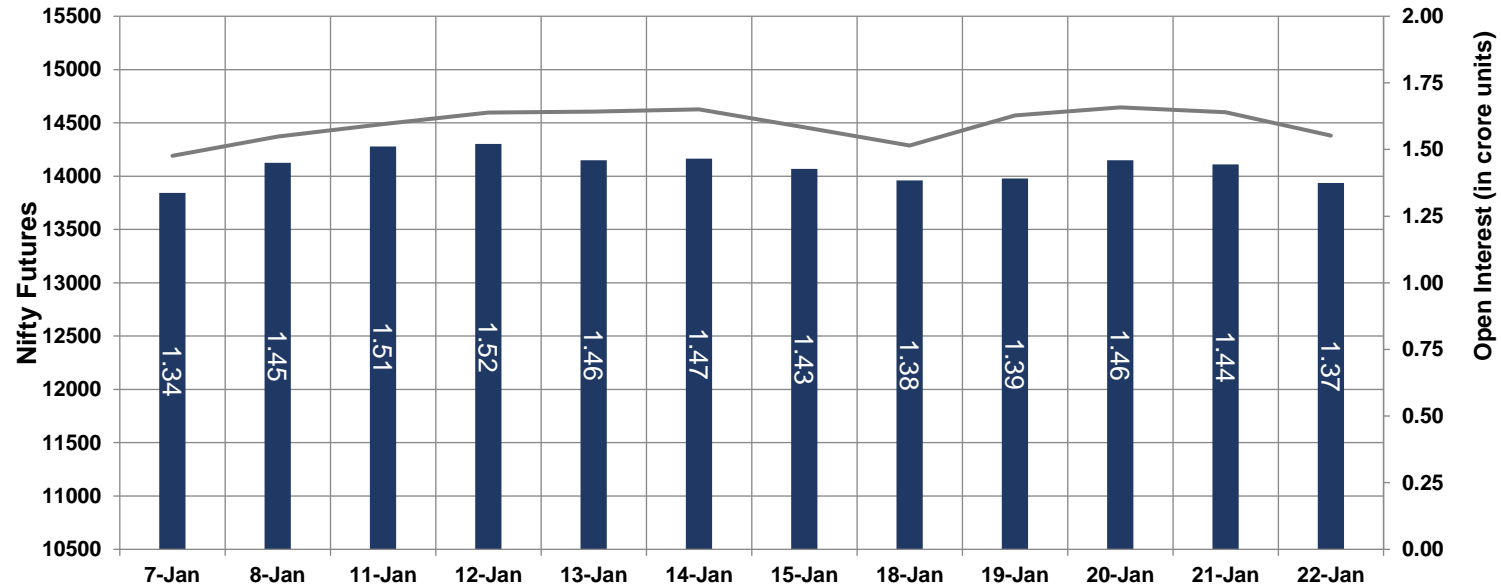
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14372	14188	14280	14450	14542	14712	Neutral	Buy	Buy
SENSEX	48878	48284	48581	49129	49426	49974	Neutral	Buy	Buy
NIFTY FUTURES	14371	14181	14276	14451	14546	14721	Neutral	Buy	Buy
BANK NIFTY	31167	30461	30814	31473	31826	32484	Neutral	Neutral	Buy
CNX IT	26490	26109	26299	26483	26674	26858	Buy	Buy	Buy
CNX MIDCAP	21659	21222	21441	21776	21994	22329	Neutral	Buy	Buy
CNX SMALLCAP	7348	7237	7293	7376	7432	7515	Neutral	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

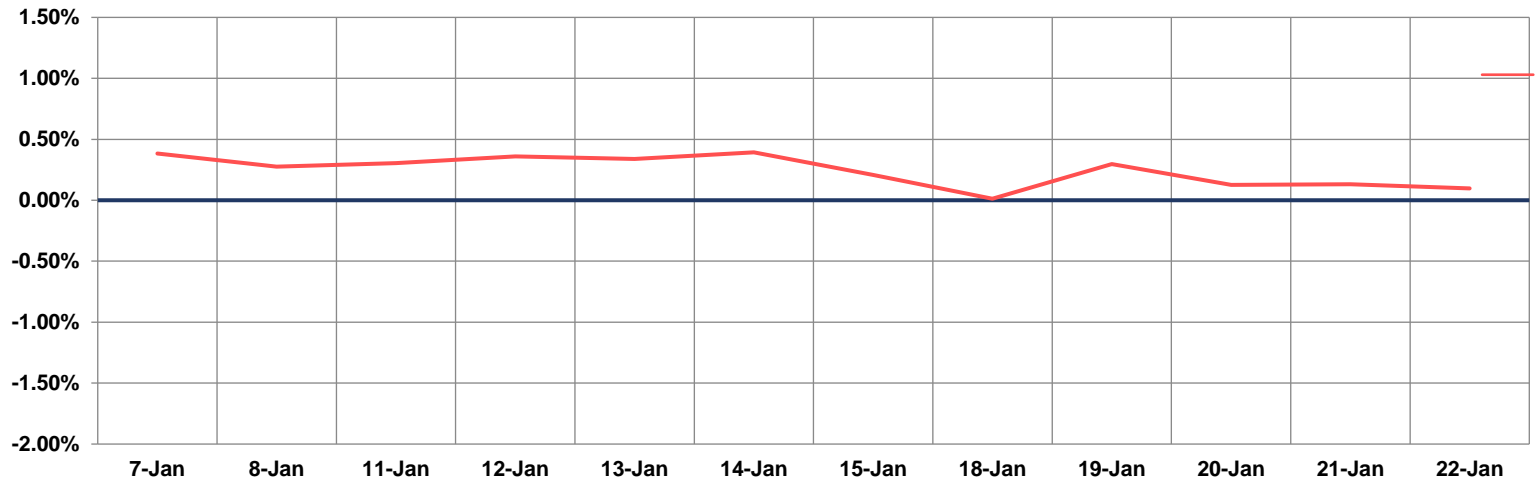
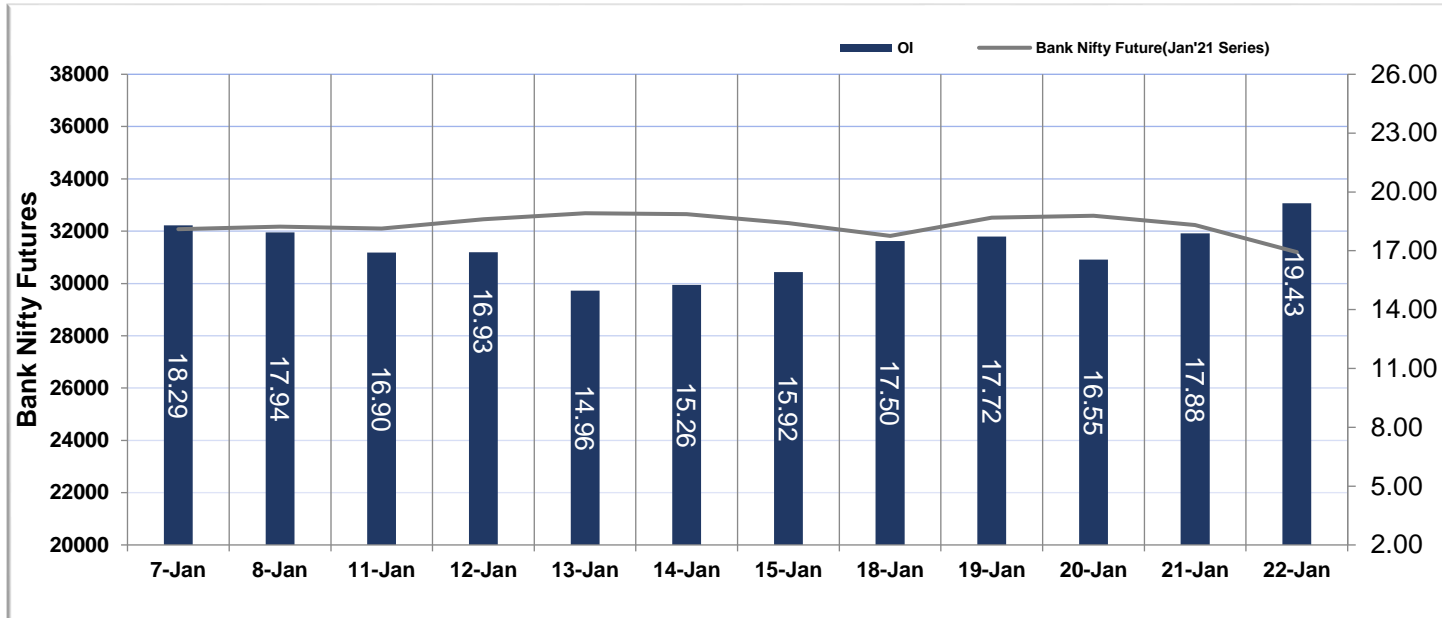


➤ Nifty Cash prices have settled at 14371.90 down by 1.50 percent from the previous close. On the upper side it has resistance of **14480** and **14550** levels, while lower side it has support of **14290** and **14150** levels. Intraday traders should be cautious and take position accordingly.

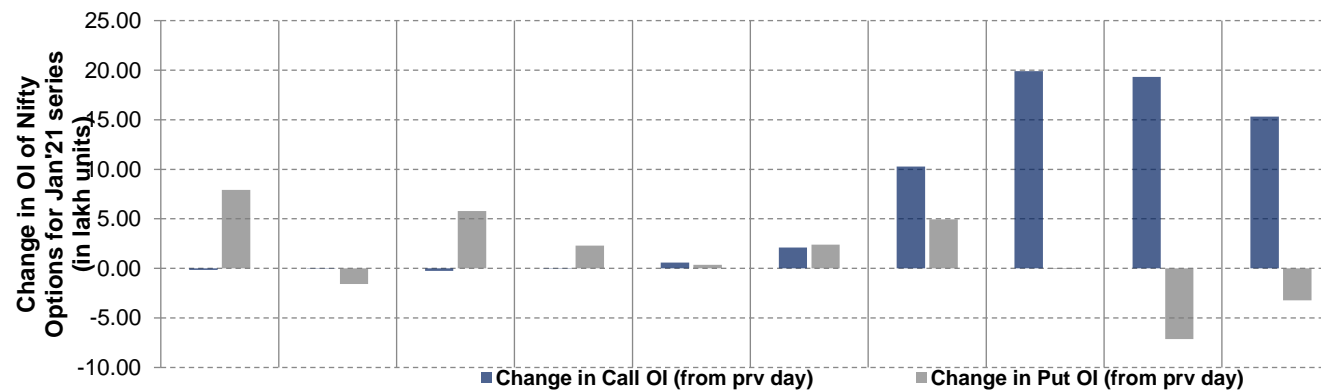
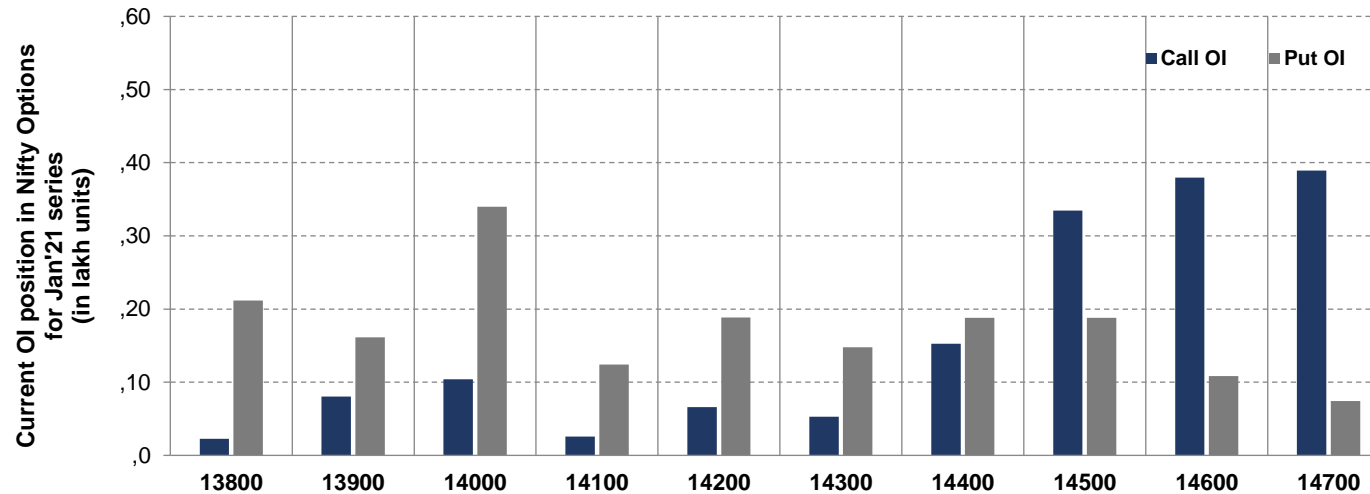
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,700 SP from the Jan month expiry was the most active call with an addition of 1.53 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with an addition of 0.60 million in open interests.
- The maximum OI outstanding for Calls was at 14,700 SP (3.90mn) and that for Puts was at 14,000 SP (3.40mn)

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