

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended in deep red on Monday's trading session. The start of the day was on a positive note, taking support with former deputy chairman of Planning Commission Montek Singh Ahluwalia's statement that the country's economy, which contracted in the first two quarters of the current fiscal, has started recovering at a gradual pace. Besides, in order to meet the GST compensation shortfall, the Ministry of Finance, Department of Expenditure has released the 13th weekly instalment of Rs 6,000 crore to the states.

However, key indices soon turned volatile, as the RBI data showed that the country's foreign exchange reserves declined by \$1.839 billion to \$584.242 billion in the week ended January 15. Downside remained capped during first half of the session, after the UN has said that foreign Direct Investment into India rose by 13 per cent in 2020, boosted by interest in the digital sector, and while fund flows "declined most strongly" in major economies such as the UK, the US and Russia due to the COVID-19 pandemic, India and China 'bucked the trend'.

In the second half of the session, markets added more losses to end near their intraday low points, on the back of negative cues from European markets. Traders remained on sidelines on report that Indian and Chinese troops came face-to-face at Naku La in North Sikkim last week amid the tense border standoff between the two sides in eastern Ladakh. They said the Chinese troops attempted to transgress into the Indian side of the Line of Actual Control (LAC) but were stopped by the Indian military personnel. It is learnt that a brawl broke out when the Indian troops stopped the Chinese soldiers.

On the global front, European markets were trading mostly in red amid chatter that there could be tighter border restrictions and extended lockdowns to keep the new COVID-19 variant at bay. Asian markets ended mixed, after the share of Hong Kong businesses expecting their business situation to be worse in the first quarter of the year compared to the final three months of last year was higher than that expecting it to be better. The survey data from the Census and Statistics Department showed that the net balance of business expectations weakened to -17 from -8 in the fourth quarter.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48347.59	-530.95	-1.09
NIFTY	14238.90	-133.00	-0.93
MIDCAP	18547.34	-214.53	-1.14
SMLCAP	18210.80	-211.25	-1.15
BSEFMC	12570.64	-97.95	-0.77
AUTO	23512.11	-193.09	-0.81
POWER	2062.81	-29.59	-1.41
REALTY	2518.60	-16.83	-0.66
BSE IT	26066.49	-346.01	-1.31
BANKEX	35370.57	-9.02	-0.03
OIL GAS	14199.24	-313.00	-2.16
METAL	11567.21	21.51	0.19
INDIA VIX	23.25	0.82	3.67

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	501	1451	70
BSE	901	2076	153

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4730	5251	(10)
NSE CASH	74171	83590	(11)
NSE F&O	3454658	3126119	11

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	38.42	4.07	1.11
SENSEX	33.13	3.29	0.82

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5090	5478	(388)
FII	8423	9188	(765)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	8658.83	6797.96	1861
Index Options	442618.04	441360.57	1257
Stock Futures	49481.62	48809.65	672
Stock Options	17936.75	17546.10	391

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.02	1.14
BANK NIFTY	0.71	0.63

SECURITIES BAN FOR TRADE IN F&O FOR 27-01-2021

NATIONALUM
PNB
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.954	5.939	0.25
USA	1.079	1.091	-1.12

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.30	90.21	0.10

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27-Jan-21 USD-INR	72.92	-0.04	-0.05
27-Jan-21 EUR-INR	88.68	-0.16	-0.18
27-Jan-21 GBP-INR	99.83	0.12	0.12
27-Jan-21 JPY- INR	70.27	-0.12	-0.17

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1864.23	9.27	0.50
Silver	25.65	0.23	0.92
Crude-Oil	52.09	-0.18	-0.34
Brent-Crude	55.22	-0.21	-0.38

INDEX TREND ANALYSIS

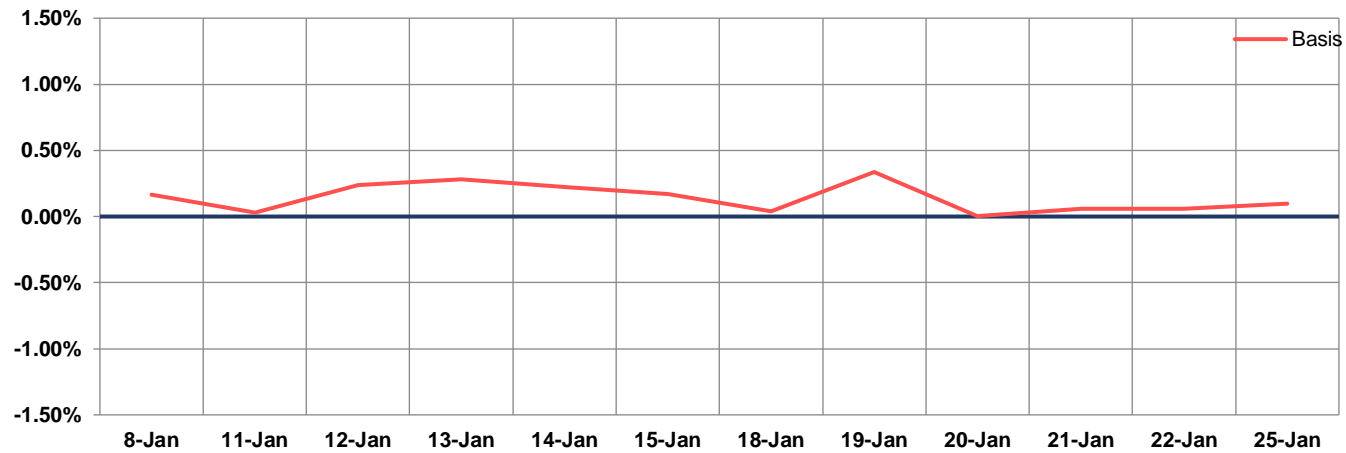
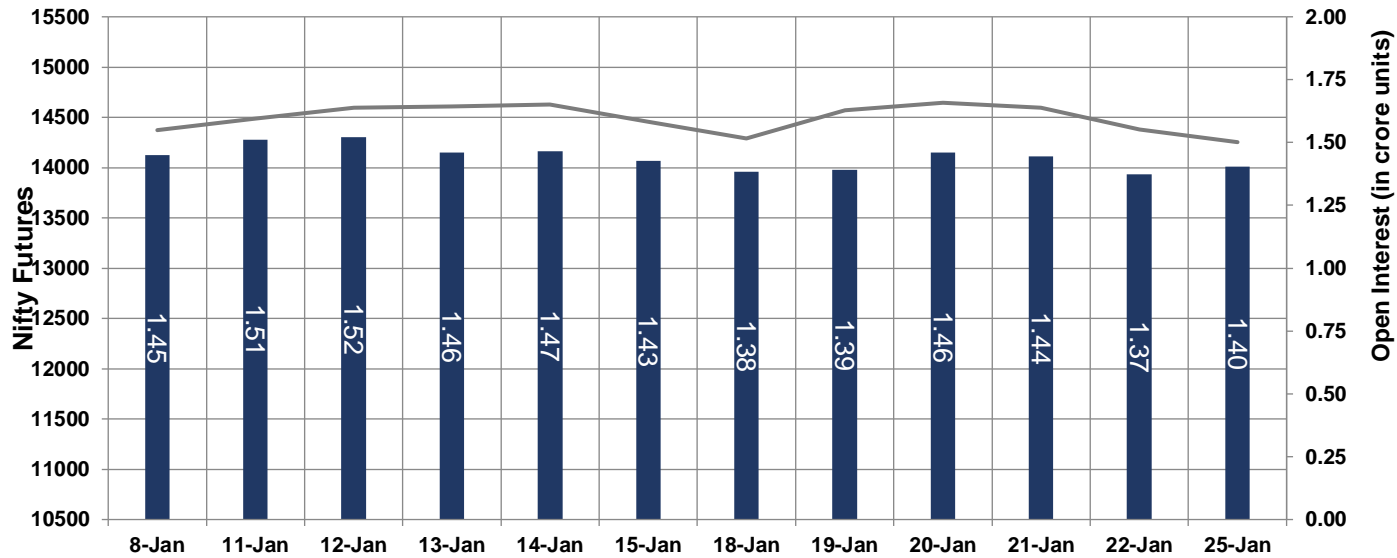
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14239	14044	14141	14316	14414	14589	Neutral	Buy	Buy
SENSEX	48348	47640	47994	48628	48982	49617	Neutral	Buy	Buy
NIFTY FUTURES	14260	14066	14163	14330	14427	14595	Neutral	Buy	Buy
BANK NIFTY	31198	30619	30909	31303	31593	31987	Neutral	Neutral	Buy
CNX IT	26023	25433	25728	26207	26502	26981	Neutral	Buy	Buy
CNX MIDCAP	21455	20797	21126	21551	21880	22306	Neutral	Buy	Buy
CNX SMALLCAP	7262	7022	7142	7296	7416	7571	Neutral	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

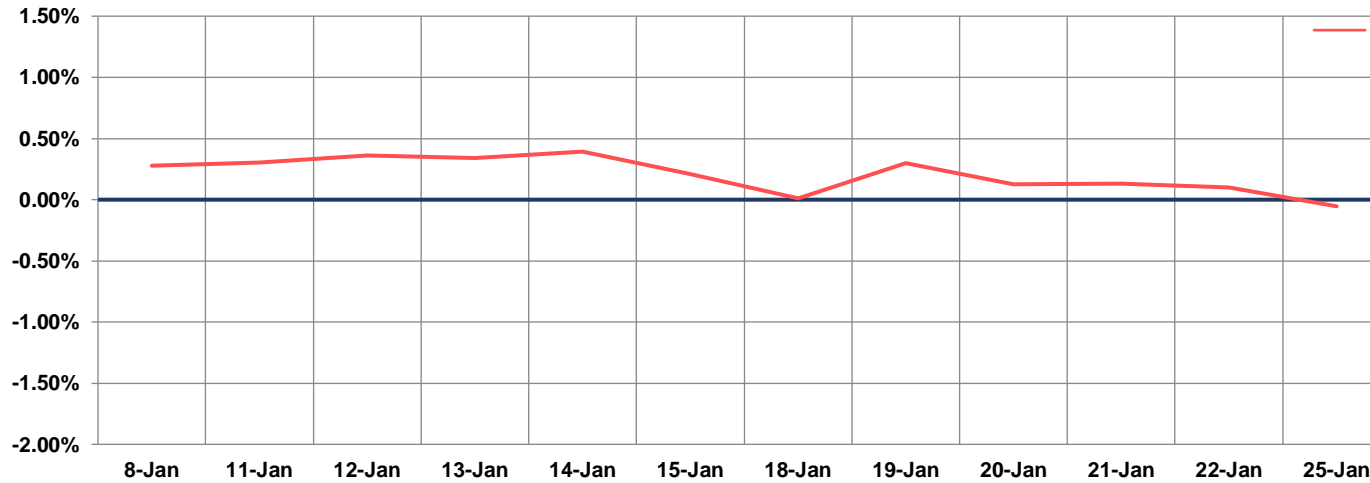
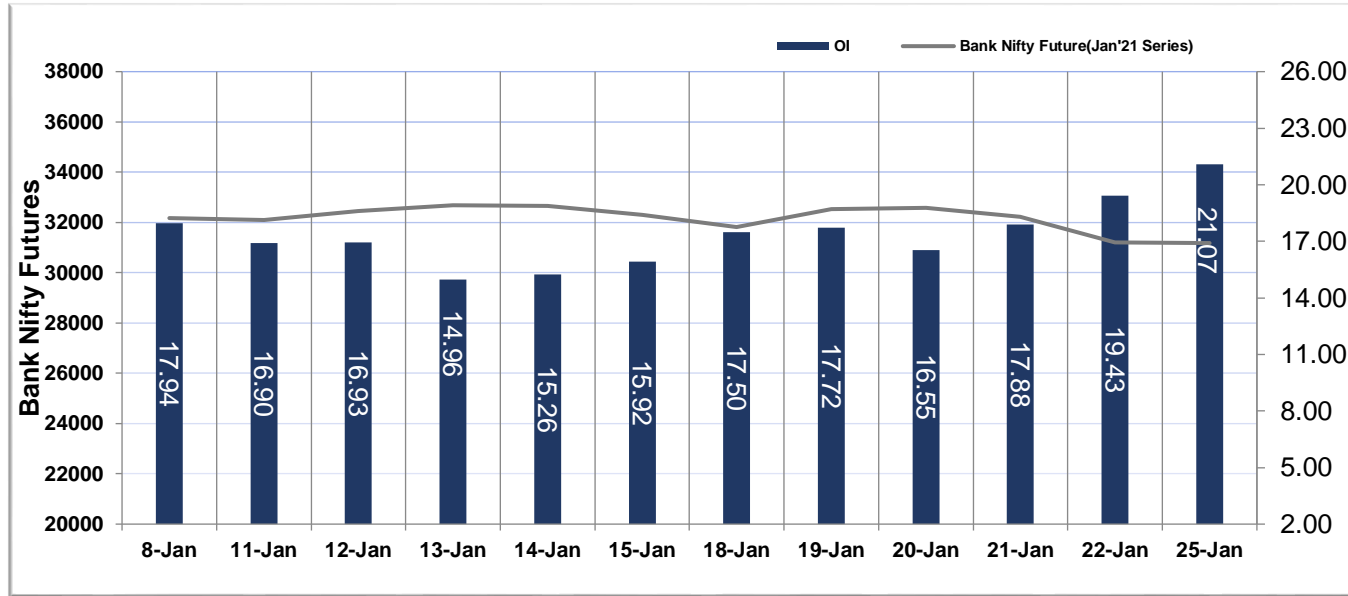


➤ Nifty Cash prices have settled at 14238.90 down by 0.93 percent from the previous close. On the upper side it has resistance of **14380** and **14470** levels, while lower side it has support of **14140** and **14070** levels. Intraday traders should be cautious and take position accordingly.

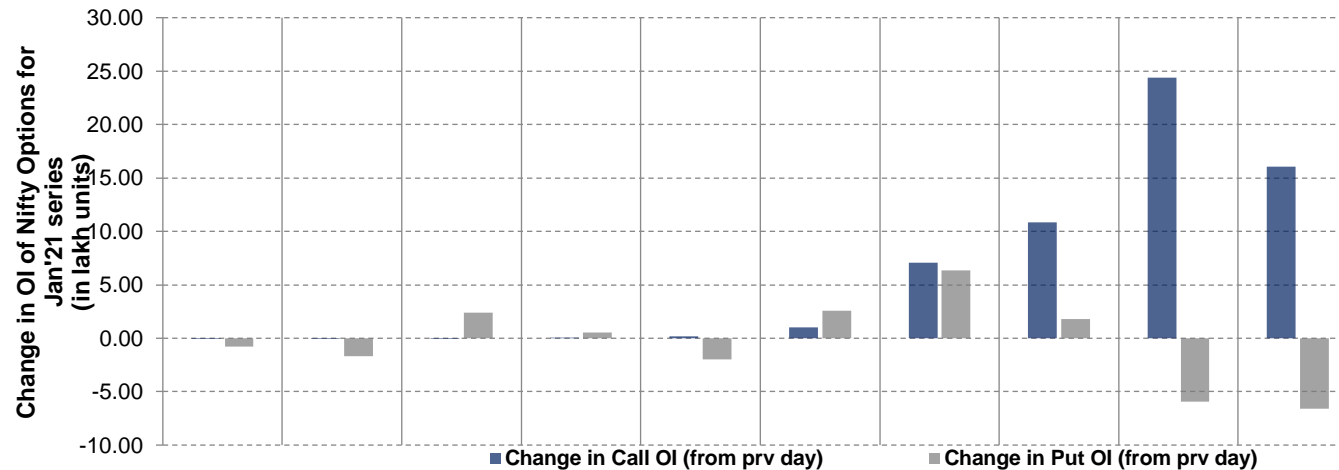
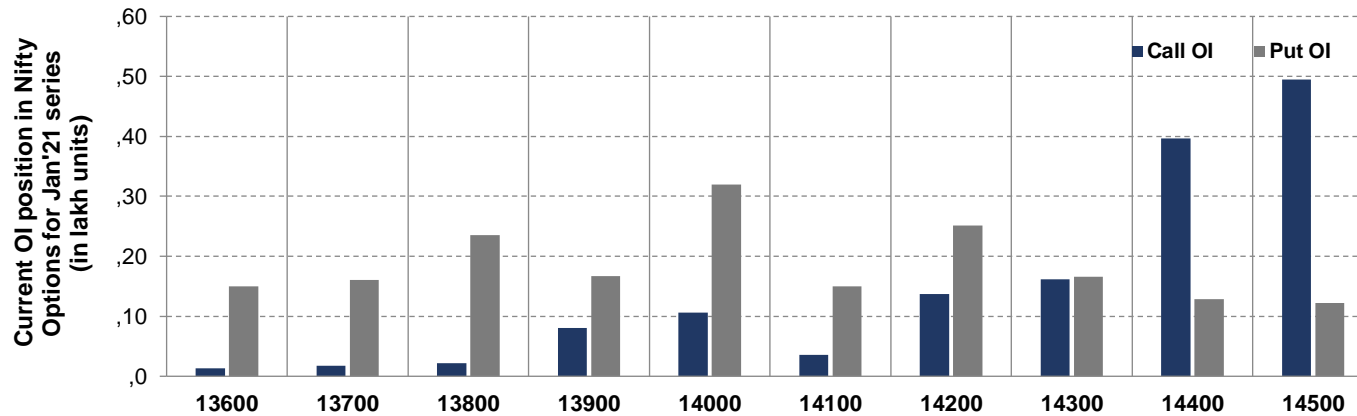
NIFTY FUTURES



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 1.60 million in open interests.
- Among Nifty puts 14,000 SP from the Jan month expiry was the most active put with a reduction of 0.20 million in open interests.
- The maximum OI outstanding for Calls was at 14,500 SP (4.95mn) and that for Puts was at 14,000 SP (3.20mn)

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