

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended in red for yet again as traders continued to book profit off the table for fifth straight day on Thursday ahead of the Union Budget announcement next week. Markets started the session on pessimistic note as traders remained on sidelines as today was expiry of January-series futures and options (F&O) contracts. Traders were concerned as India recorded 11,752 fresh cases of the coronavirus disease (Covid-19). The caseload tally stands at 10,702,031. Globally, more than 101.4 million people have been infected by the virus. The country continues to be second-most-affected globally, and ranks 14th among worst-hit nations by active cases. The five most affected states by total cases are Maharashtra (2,013,353), Karnataka (936,955), Kerala (899,932), Andhra Pradesh (887,238), and Tamil Nadu (835,803). Traders took note of report that PE/VC investments in 2020 were at par with the previous year in terms of value at \$47.6 billion as compared to \$47.3 billion in 2019. Reliance Group entities topped the chart in 2020 with about \$17.3 billion, which accounts for 36 per cent of the PE/VC investments in 2020.

Though, markets managed to somehow restrict their losses up to certain extent as traders took some support with report that Gita Gopinath, the Chief Economist of the International Monetary Fund (IMF), said that India has entered 2021 with better prospects than what was expected last year and has been able to restore activity faster than many economies. Market participants got some sense of relief with report India's Foreign Direct Investment (FDI) saw a significant jump in November 2020. FDI data released by the Commerce Ministry shows that total FDI in the month of November 2020 grew by a whopping 81 per cent to \$10.15 billion against \$5.6 billion in November 2019. FDI equity has also jumped to \$8.5 billion as against \$2.8 billion in November 2019, registering a growth of 70 per cent.

Global cues too remained sluggish with all the European counters trading in red, soured by a sell-off on Wall Street, no end in sight to pandemic lockdowns and a squeeze in short positions. Asian markets ended lower following the overnight sell-off on Wall Street amid concerns about excessive stock valuations. In addition, the U.S. Federal Reserve said it will maintain asset purchases at the current rate until 'substantial further progress' has been made toward its goals of maximum employment and price stability. Besides, the Ministry of Economy, Trade and Industry said the value of retail sales in Japan was down 0.3 percent on year in December, coming in at 14.434 trillion yen.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	46874.36	-535.57	-1.13
NIFTY	13817.55	-149.95	-1.07
MIDCAP	18208.37	-83.79	-0.46
SMLCAP	18033.90	-81.41	-0.45
BSEFMC	12379.86	-225.68	-1.79
AUTO	22799.80	-216.90	-0.94
POWER	2034.17	-9.98	-0.49
REALTY	2410.15	-51.00	-2.07
BSE IT	25451.09	-501.06	-1.93
BANKEX	34433.26	98.46	0.29
OIL GAS	14013.95	106.43	0.77
METAL	11232.86	-40.86	-0.36
INDIA VIX	24.29	-0.10	-0.41

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	936	972	82
BSE	1551	1324	165

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5405	4020	34
NSE CASH	71408	71082	0
NSE F&O	7723189	4621298	67

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	36.96	3.92	1.15
SENSEX	31.96	3.18	0.85

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

FII-DII*	Buy	Sell	Net
DII	6351	4614	1737
FII	8494	12206	(3712)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	10498.45	11887.89	(1389)
Index Options	905394.13	900648.50	4746
Stock Futures	31247.99	30328.12	920
Stock Options	6384.17	5569.18	815

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.91	0.90
BANK NIFTY	0.82	0.56

## SECURITIES BAN FOR TRADE IN F&O FOR 29-01-2021

NIL
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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.937	5.954	-0.29
USA	1.011	1.014	-0.30

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.70	9.45	0.27

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	73.27	0.05	0.07
24-Feb-21 EUR-INR	88.36	-0.07	-0.08
24-Feb-21 GBP-INR	100.10	-0.40	-0.40
24-Feb-21 JPY- INR	70.29	-0.24	-0.34

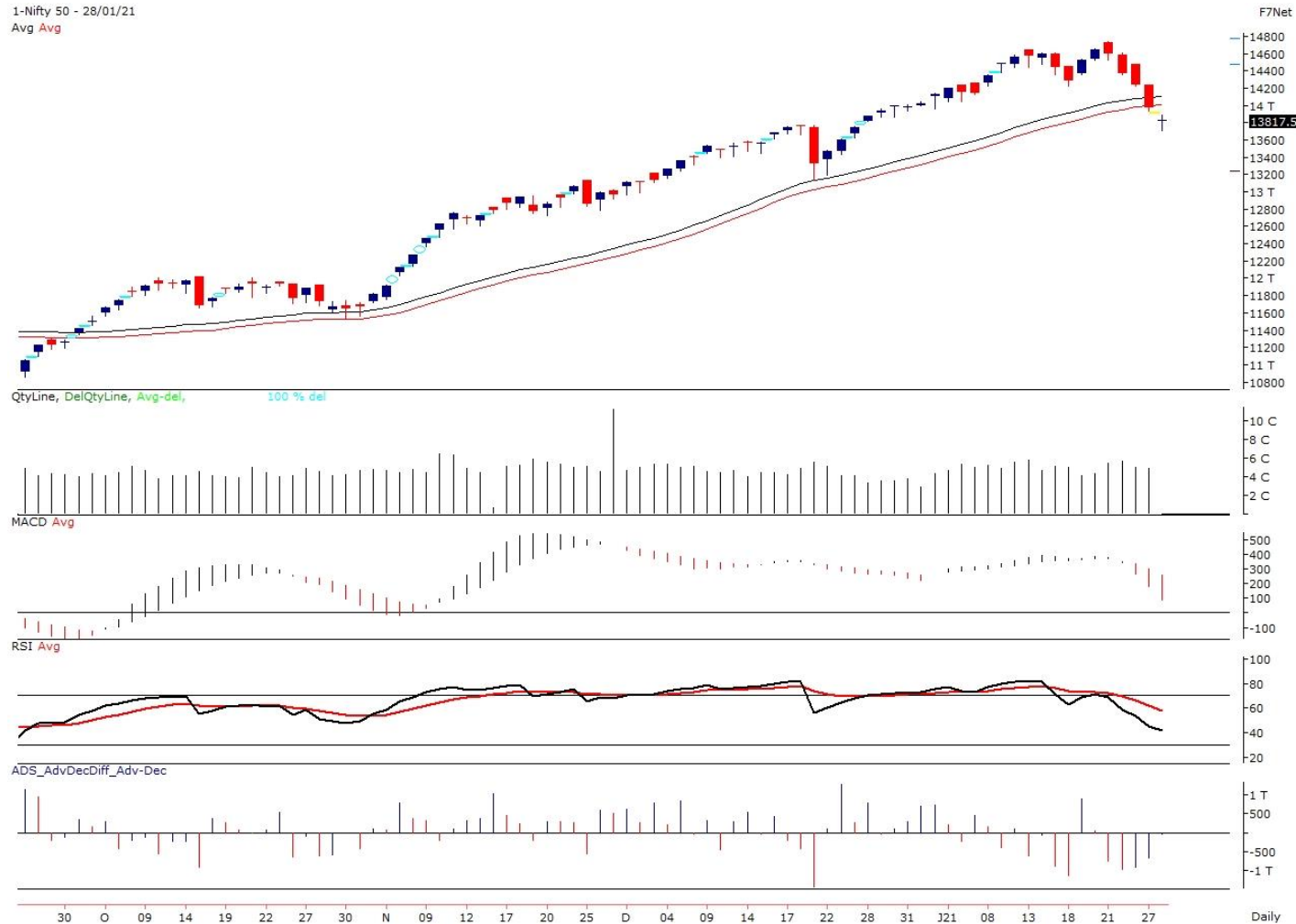
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1843.31	-0.65	-0.04
Silver	26.19	-0.30	-1.10
Crude-Oil	52.34	0.00	0.00
Brent-Crude	55.58	0.05	0.09

## INDEX TREND ANALYSIS

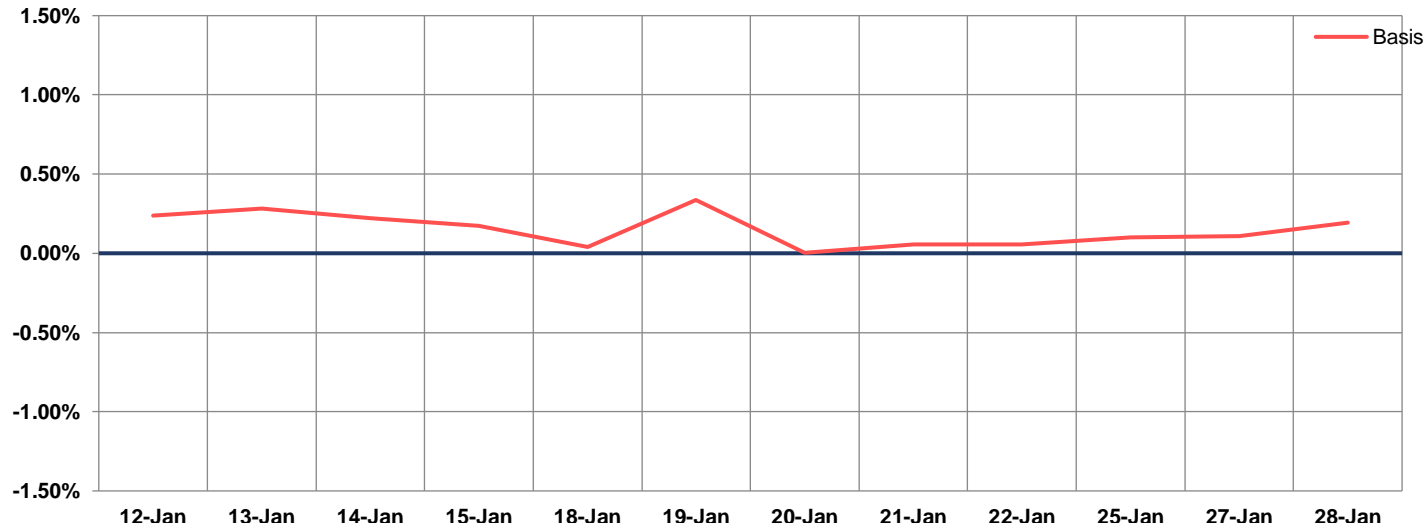
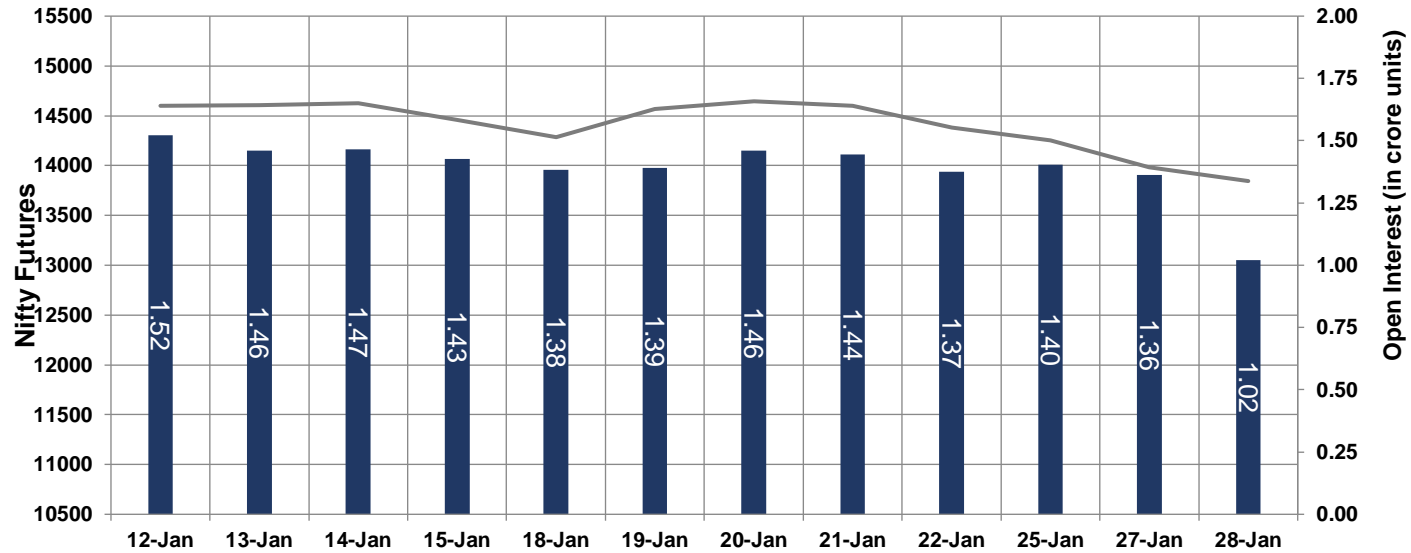
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	13817	13625	13721	13810	13906	13995	Neutral	Buy	Buy
SENSEX	46874	46201	46538	46855	47191	47508	Neutral	Buy	Buy
NIFTY FUTURES	13819	13617	13718	13807	13909	13998	Neutral	Buy	Buy
BANK NIFTY	30358	29393	29876	30170	30652	30947	Neutral	Neutral	Buy
CNX IT	25301	24882	25091	25449	25659	26017	Neutral	Buy	Buy
CNX MIDCAP	20990	20649	20819	20984	21155	21320	Neutral	Buy	Buy
CNX SMALLCAP	7222	7093	7157	7214	7279	7336	Neutral	Buy	Buy

## NIFTY TECHNICAL & INDICES LEVEL

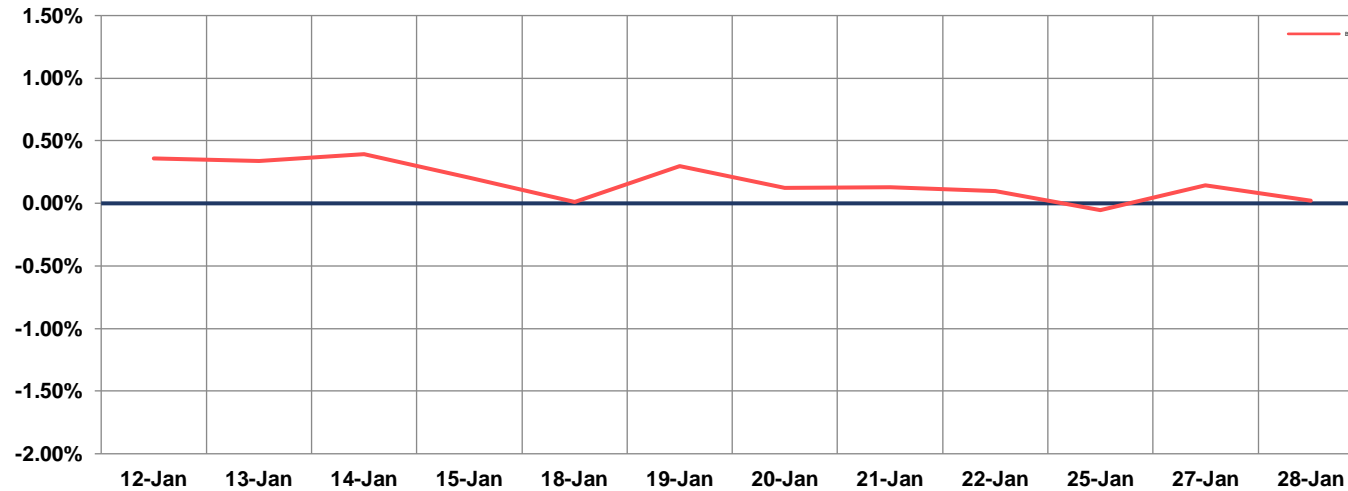
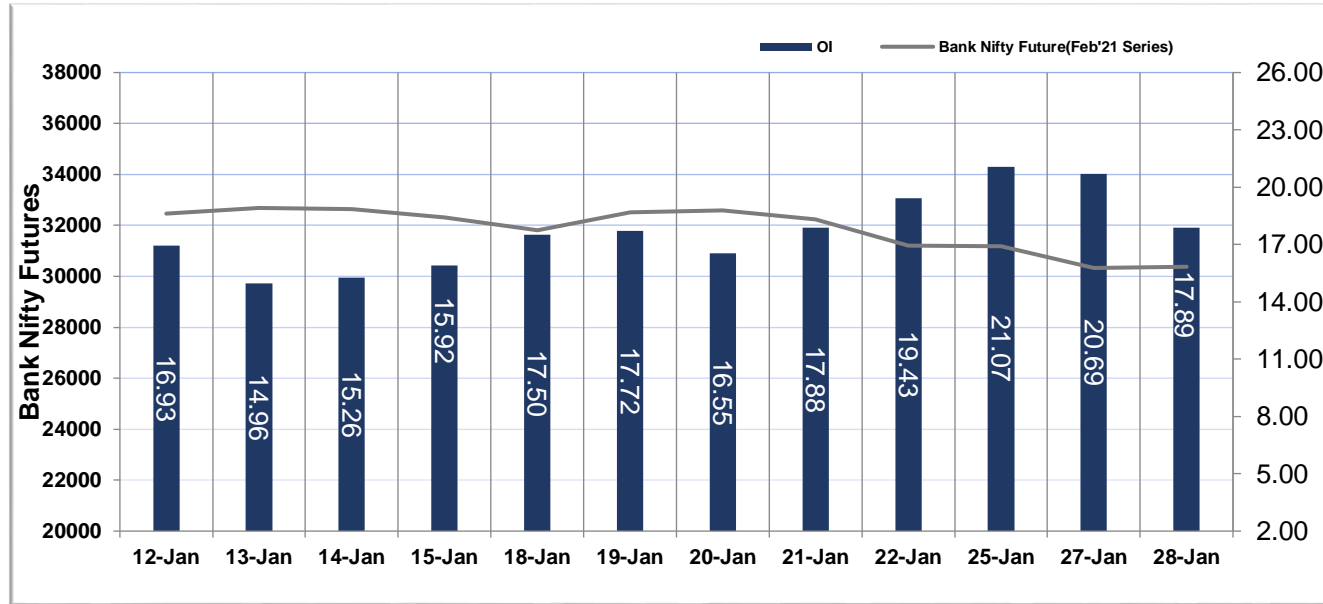


- Nifty Cash prices have settled at 13817.55 down by 1.07 percent from the previous close. On the upper side it has resistance of **13920** and **14090** levels, while lower side it has support of **13720** and **13680** levels. Intraday traders should be cautious and take position accordingly.

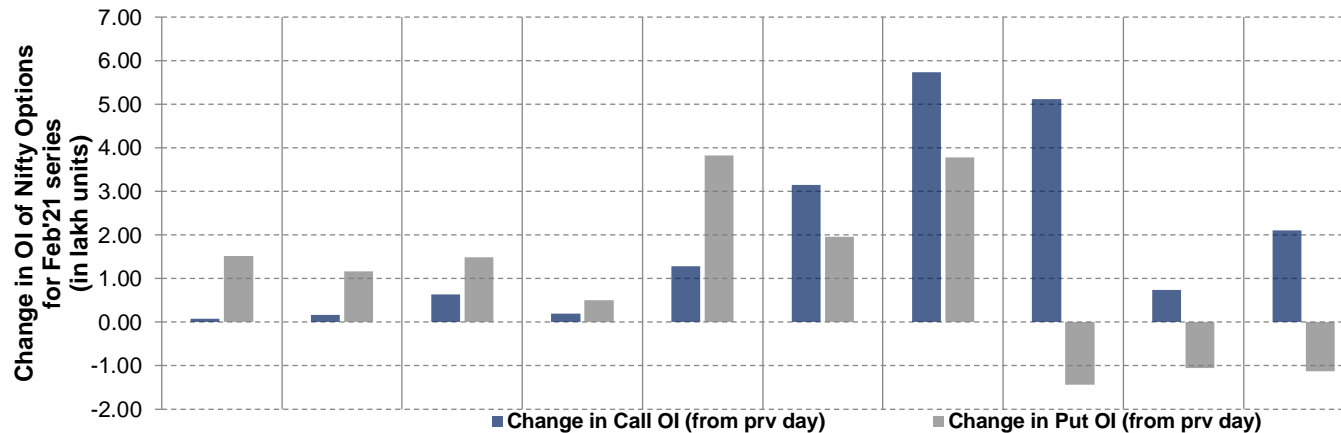
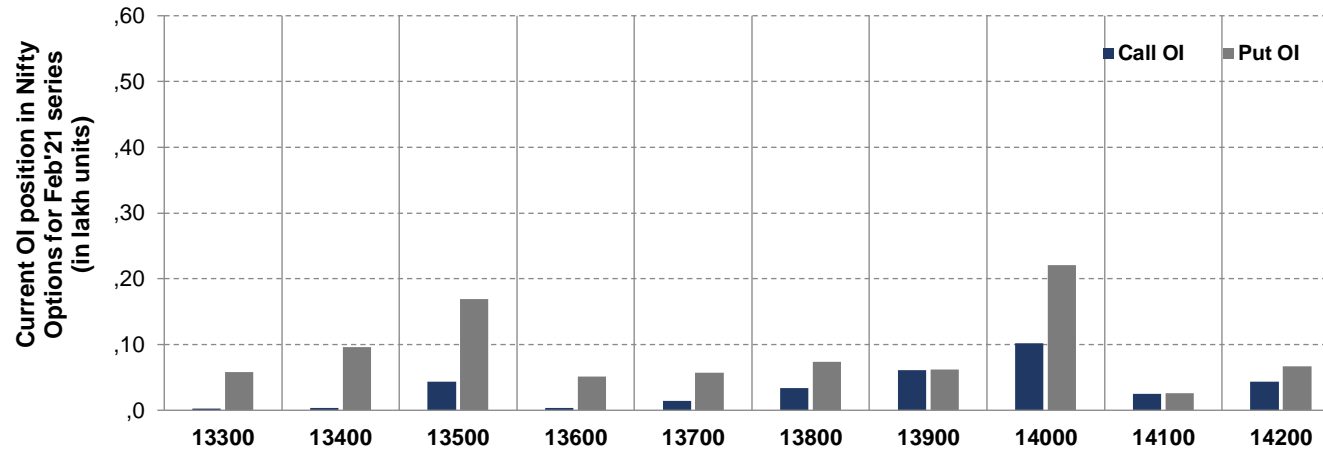
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 14,000 SP from the Feb month expiry was the most active call with an addition of 0.51 million in open interests.
- Among Nifty puts 14,000 SP from the Feb month expiry was the most active put with a reduction of 0.14 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (1.02mn) and that for Puts was at 14,000 SP (2.21mn)



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