

# Morning Mantra

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

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## MARKET COMMENTARY

Economic Survey failed to cheer Dalal Street on Friday's trading session, with both Sensex and Nifty ending in deep red. Markets made a positive start of the day, as SBI Research's report stated that with record GST collections expected in January at Rs 1.21-1.23 lakh crore, the shortfall in state GST can be narrowed to a minimal Rs 11,000 crore. Ongoing efforts to plug the leakages in GST collection has been bearing fruit since September. Traders were seen taking a note of Prime Minister Narendra Modi's statement that India is promoting investment in frontier technologies including Artificial Intelligence, additive manufacturing and interdisciplinary cyber-physical systems. Speaking at the World Economic Forum's Davos Dialogue via video conferencing, PM Modi said that the transactions at Unified Payments Interface (UPI) platforms have crossed 2 billion per month and a major portion of these transactions are taking place through the apps developed by private players.

But soon, key indices cut their gains and traded near neutral lines in the first half of the trading session, as IMF's Chief Economist Gita Gopinath stated that it would be damaging for India to start tightening policy support in the midst of the COVID-19 pandemic. She said there is scope for the Indian government to provide more direct support to people. In the second half of the trading session, markets saw sharp fall, after the Economic Survey 2020-21 said that India's GDP is estimated to contract by 7.7 per cent during the current fiscal. According to the survey, the real growth rate for FY22 was assumed at 11.5 per cent based on IMF estimates. Meanwhile, with electric vehicles (EVs) fast becoming the new reality, Union Minister for MSME and Road Transport & Highways Nitin Gadkari has expressed a need to emerge as pioneers in developing leading battery and power-train technologies.

On the global front, European markets were trading lower tracking declines in Asian and U.S. equity markets on caution around a retail trading frenzy that gripped Wall Street this week. Asian markets ended lower on Friday, even after Malaysia's exports rose sharply in December. The data from the Department of Statistics showed that exports rose 10.8 percent year-on-year in December, following a 4.6 percent increase in November. At MYR 95.7 billion, exports reached its highest value recorded in 2020. Imports grew 1.6 percent annually to MYR 75.0 billion in December, after a 9.0 percent fall in the previous month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	46285.77	-588.59	-1.26
NIFTY	13634.60	-182.95	-1.32
MIDCAP	18082.23	-126.14	-0.69
SMLCAP	17988.20	-45.70	-0.25
BSEFMC	12218.24	-161.62	-1.31
AUTO	22127.69	-672.11	-2.95
POWER	2004.65	-29.52	-1.45
REALTY	2418.52	8.37	0.35
BSE IT	24820.69	-630.40	-2.48
BANKEK	34662.51	229.25	0.67
OIL GAS	13811.98	-201.97	-1.44
METAL	11031.12	-201.74	-1.80
INDIA VIX	25.34	1.05	4.32

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	865	1043	78
BSE	1327	1587	149

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4292	5405	(21)
NSE CASH	84609	71408	18
NSE F&O	1793726	7723189	(77)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	36.57	3.86	1.16
SENSEX	31.75	3.15	0.86

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

FII-DII*	Buy	Sell	Net
DII	7582	5139	2443
FII	11875	17806	(5931)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	6472.67	6477.73	(5)
Index Options	247516.59	245045.78	2471
Stock Futures	17412.20	17595.13	(183)
Stock Options	10354.73	10550.17	(195)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.98	0.91
BANK NIFTY	0.87	0.82

## SECURITIES BAN FOR TRADE IN F&O FOR 01-02-2021

NIL
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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.949	5.933	0.27
USA	1.072	1.055	1.64

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.53	90.45	0.09

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	73.16	-0.11	-0.16
24-Feb-21 EUR-INR	88.77	0.05	0.06
24-Feb-21 GBP-INR	100.12	0.06	0.06
24-Feb-21 JPY- INR	69.85	-0.43	-0.61

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1846.66	2.79	0.15
Silver	26.94	0.45	1.71
Crude-Oil	52.14	0.20	0.38
Brent-Crude	55.10	0.00	0.00

## INDEX TREND ANALYSIS

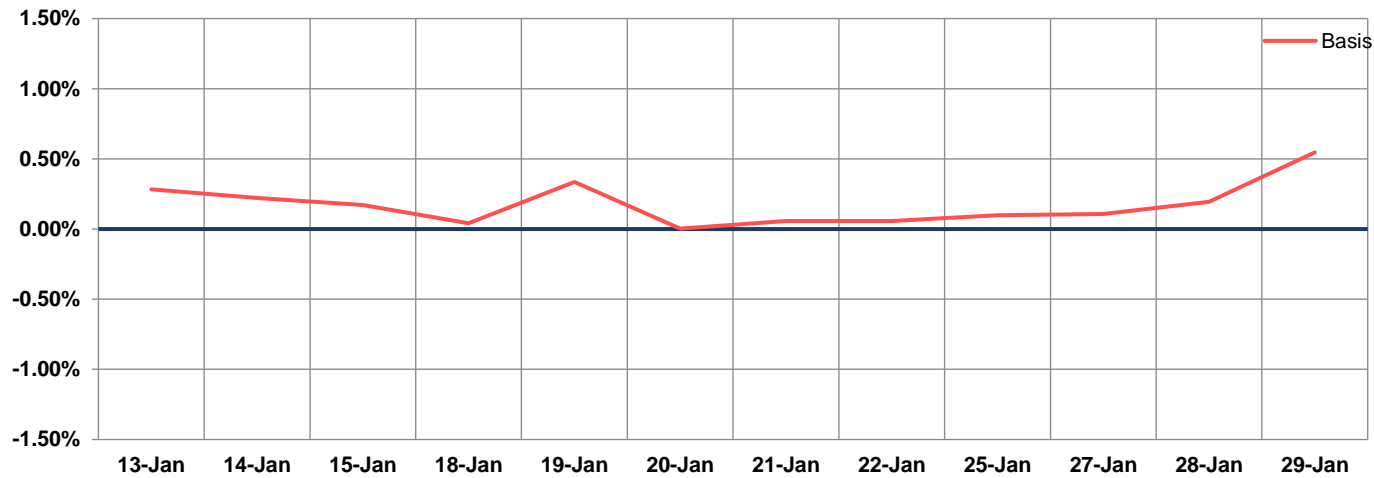
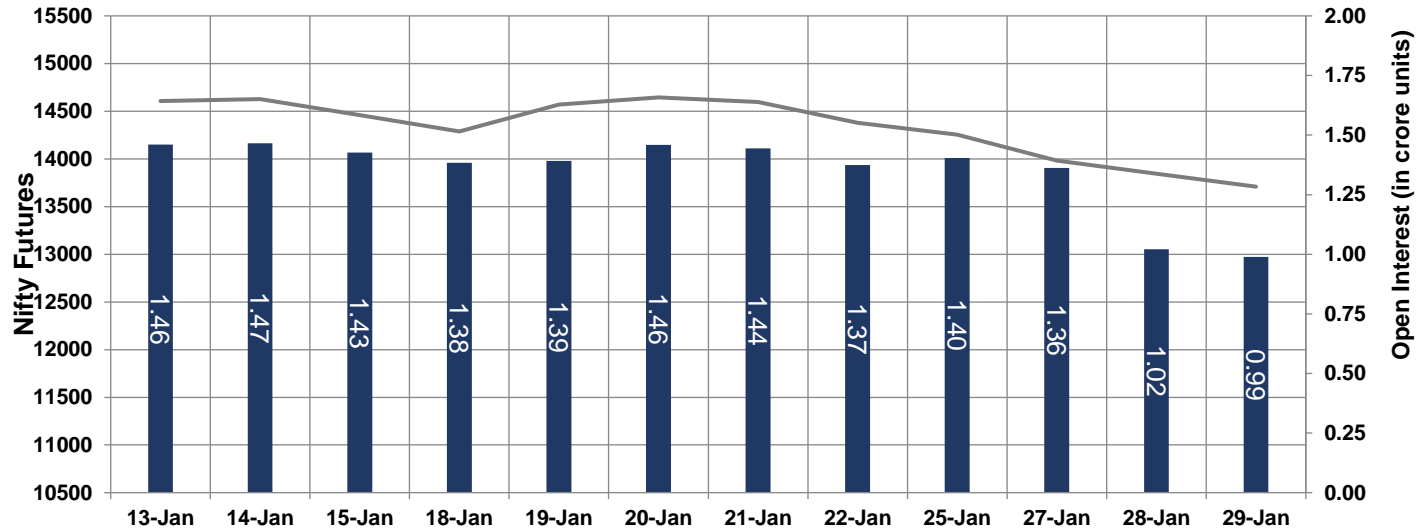
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	13635	13363	13499	13733	13869	14103	Neutral	Neutral	Buy
SENSEX	46286	45360	45823	46623	47086	47886	Neutral	Neutral	Buy
NIFTY FUTURES	13717	13472	13595	13789	13912	14107	Neutral	Neutral	Buy
BANK NIFTY	30565	29787	30176	30644	31033	31501	Neutral	Neutral	Buy
CNX IT	24646	23935	24290	24915	25270	25895	Neutral	Neutral	Buy
CNX MIDCAP	20910	20531	20721	20721	21021	21211	Neutral	Neutral	Buy
CNX SMALLCAP	7177	7066	7121	7220	7276	7375s	Neutral	Neutral	Buy

## NIFTY TECHNICAL & INDICES LEVEL

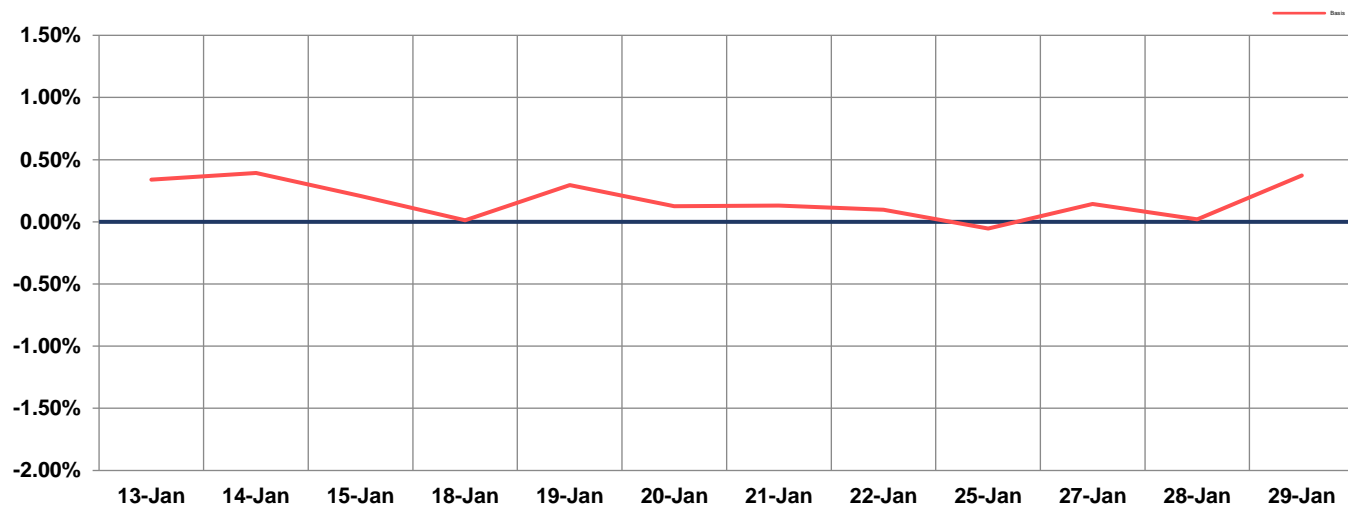
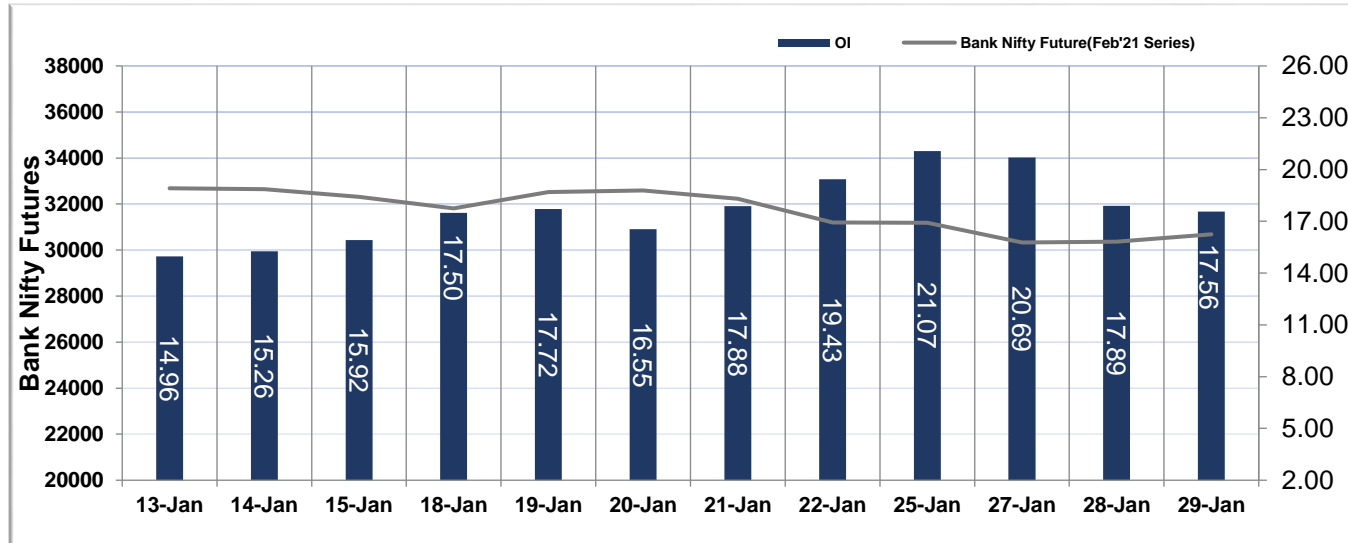


- Nifty Cash prices have settled at 13634.60 down by 1.32 percent from the previous close. On the upper side it has resistance of **13830** and **14040** levels, while lower side it has support of **13440** and **13310** levels. Intraday traders should be cautious and take position accordingly.

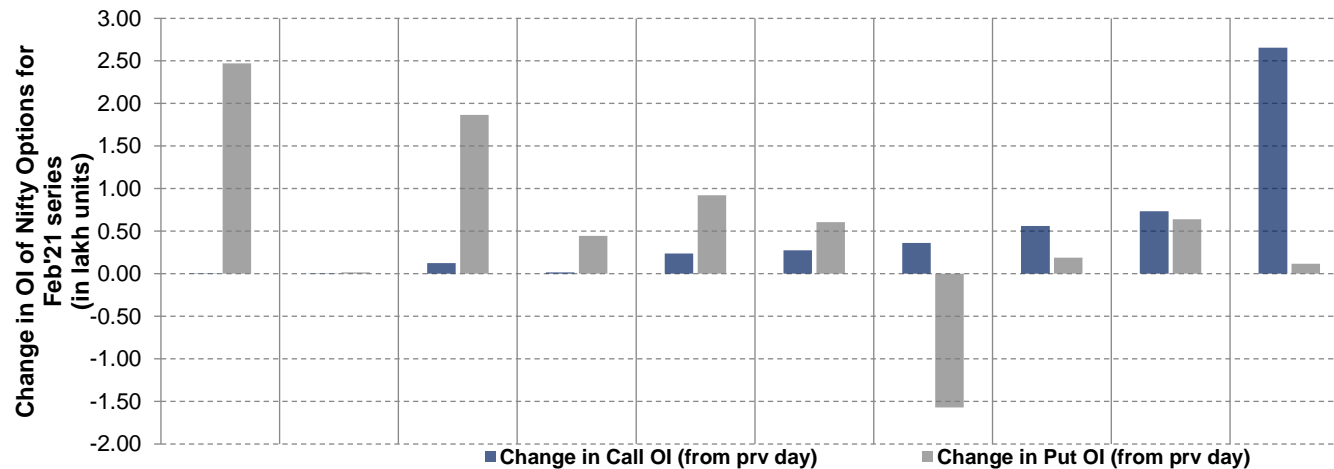
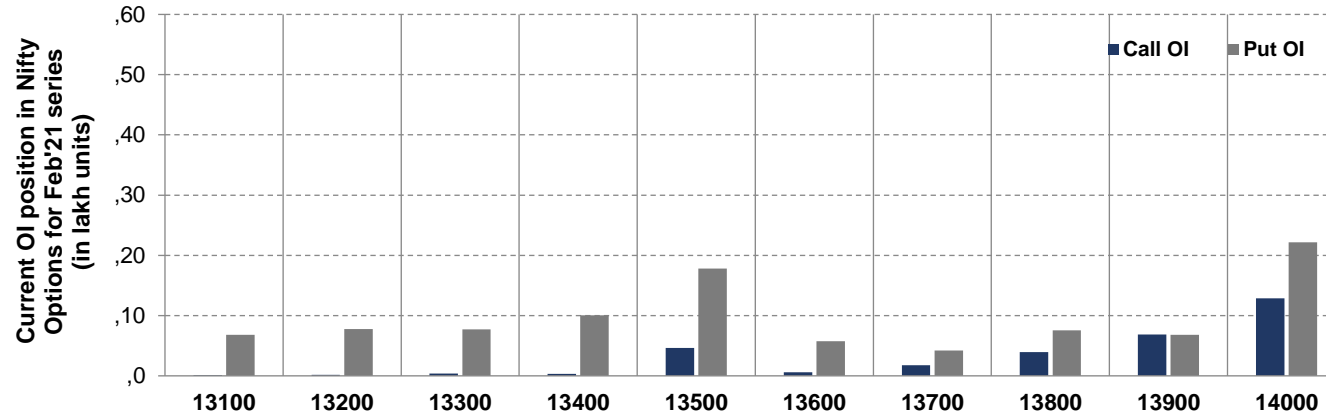
## NIFTY FUTURES



## 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 0.30 million in open interests.
- Among Nifty puts 14,000 SP from the Feb month expiry was the most active put with a reduction of 0.01 million in open interests.
- The maximum OI outstanding for Calls was at 14,000 SP (1.30mn) and that for Puts was at 14,000 SP (2.22mn)



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