

Morning Mantra

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

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MARKET COMMENTARY

Indian indices ended on a strong note on Monday's trading session as investors cheered budget announcements. The start of the trading day was on a positive note, supported with the Finance Ministry's statement that GST collections for January touched an all-time high of about Rs 1.20 lakh crore. Also, foreign portfolio investors (FPI) have remained net buyers to the tune of Rs 14,649 crore in Indian markets in January, amid availability of global liquidity and emerging markets being a preferred destination for foreign funds. Key indices remained higher for the whole trading session, as traders took some encouragement with report that retail inflation for industrial workers eased to 3.67 percent in December 2020 against 9.63 percent in the same month of last year due to lower prices of certain food items.

Markets gained traction in second half of the session, as budget introduces Aatmanirbharbharat Health Yojana with outlay of Rs 64,180 crore and government allots Rs 20,000 crore for bank recapitalisation. Adding more support, India's manufacturing sector activity strengthened in January as companies scaled up production at the quickest pace in three months in response to faster expansions in total sales and new export orders. The seasonally adjusted IHS Markit India Manufacturing Purchasing Managers' Index rose from 56.4 in December to 57.7 in January, to signal the strongest improvement in the health of the sector in three months. Some support also came with Health Minister Harsh Vardhan's statement that India was able to fight the COVID-19 pandemic much better than other countries because of its 'whole of government' and 'whole of society' approach.

On the global front, European markets were trading higher bouncing from their worst weekly decline since October helped by a rise in shares of miners after an ongoing retail frenzy shifted its attention to silver. Asian markets ended mostly higher on Monday, after the manufacturing sector in China continued to expand in January, albeit at a slower pace, the latest survey from Caixin showed on Monday with a seasonally adjusted PMI score of 51.5. That's down from 53.0, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. Chinese goods producers signaled a sustained rise in output during January, to extend the current period of expansion to 11 months. That said, the rate of growth was the least marked since last April and modest. The slowdown coincided with a weaker increase in total new work at the start of the year.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48600.61	2314.84	5.00
NIFTY	14281.20	646.60	4.74
MIDCAP	18630.31	548.08	3.03
SMLCAP	18353.32	365.12	2.03
BSEFMC	12439.33	221.09	1.81
AUTO	23058.65	930.96	4.21
POWER	2063.80	59.15	2.95
REALTY	2579.32	160.80	6.65
BSE IT	25116.30	295.61	1.19
BANKEK	37549.19	2886.68	8.33
OIL GAS	14115.62	303.64	2.20
METAL	11603.90	572.78	5.19
INDIA VIX	23.32	-2.02	-7.97

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1345	604	75
BSE	1928	1013	188

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5183	4292	21
NSE CASH	87827	84609	4
NSE F&O	3853697	1793726	115

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	38.26	4.05	1.11
SENSEX	33.08	3.33	0.82

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	6603	6694	(90)
FII	10168	8674	1494

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	12258.58	10123.86	2135
Index Options	516140.91	518660.65	(2520)
Stock Futures	23282.22	21932.35	1350
Stock Options	13705.10	13683.63	21

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.41	0.98
BANK NIFTY	1.61	0.87

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

SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.060	5.949	1.87
USA	1.079	1.094	-1.36

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.86	90.61	0.28

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	73.33	0.17	0.23
24-Feb-21 EUR-INR	88.57	-0.20	-0.23
24-Feb-21 GBP-INR	100.47	0.33	0.33
24-Feb-21 JPY- INR	69.90	0.03	0.05

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1866.63	19.98	1.09
Silver	29.45	2.52	9.35
Crude-Oil	52.56	0.37	0.71
Brent-Crude	55.61	0.42	0.88

INDEX TREND ANALYSIS

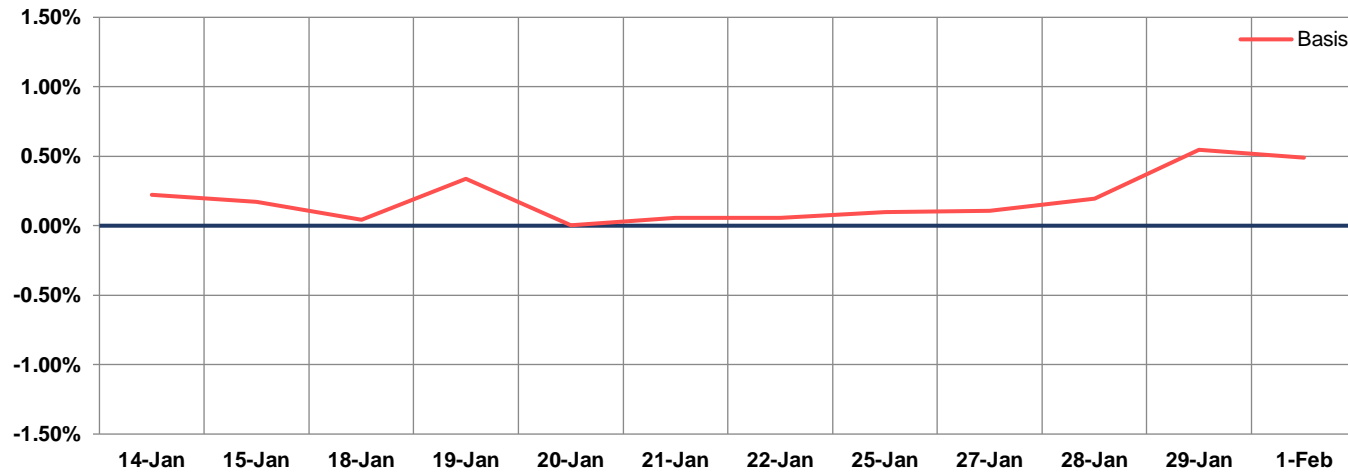
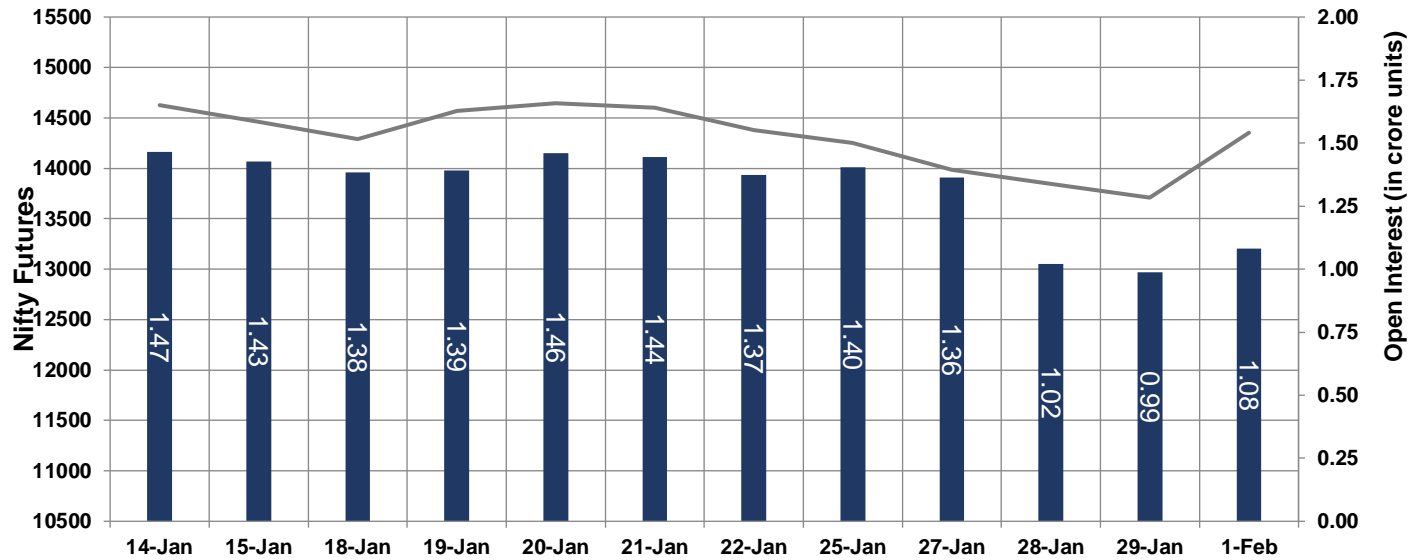
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14281	13418	13850	14093	14524	14768	Buy	Neutral	Buy
SENSEX	48601	45602	47101	47933	49432	50264	Buy	Neutral	Buy
NIFTY FUTURES	14394	13461	13928	14163	14630	14866	Buy	Neutral	Buy
BANK NIFTY	33089	30035	31562	32434	33961	34832	Buy	Neutral	Buy
CNX IT	24923	23960	24441	24790	25272	25621	Neutral	Neutral	Buy
CNX MIDCAP	21601	20477	21039	21332	21894	22186	Buy	Neutral	Buy
CNX SMALLCAP	7321	7063	7192	7260	7389	7458	Buy	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

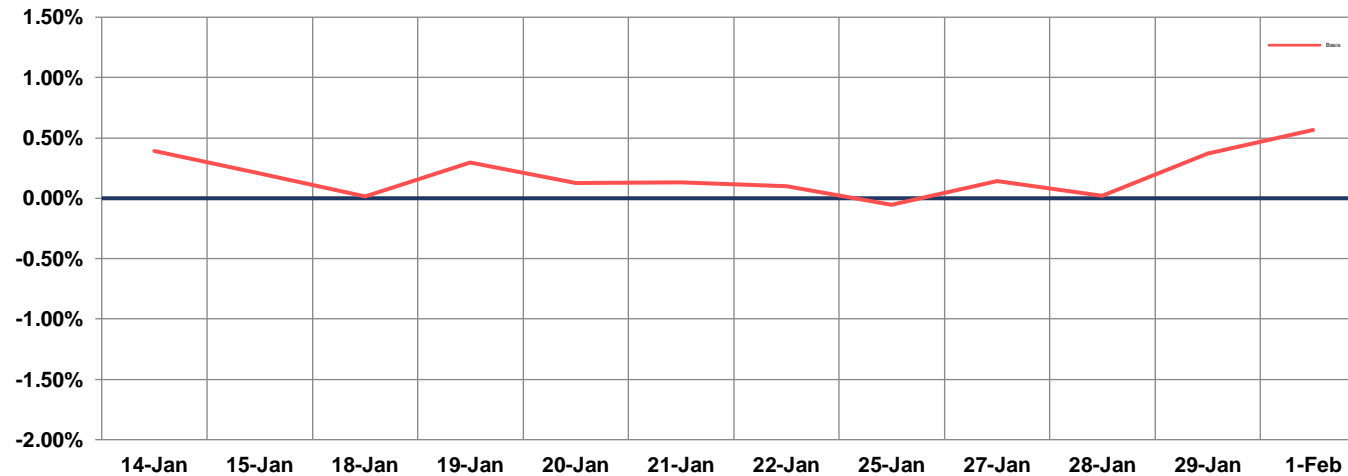
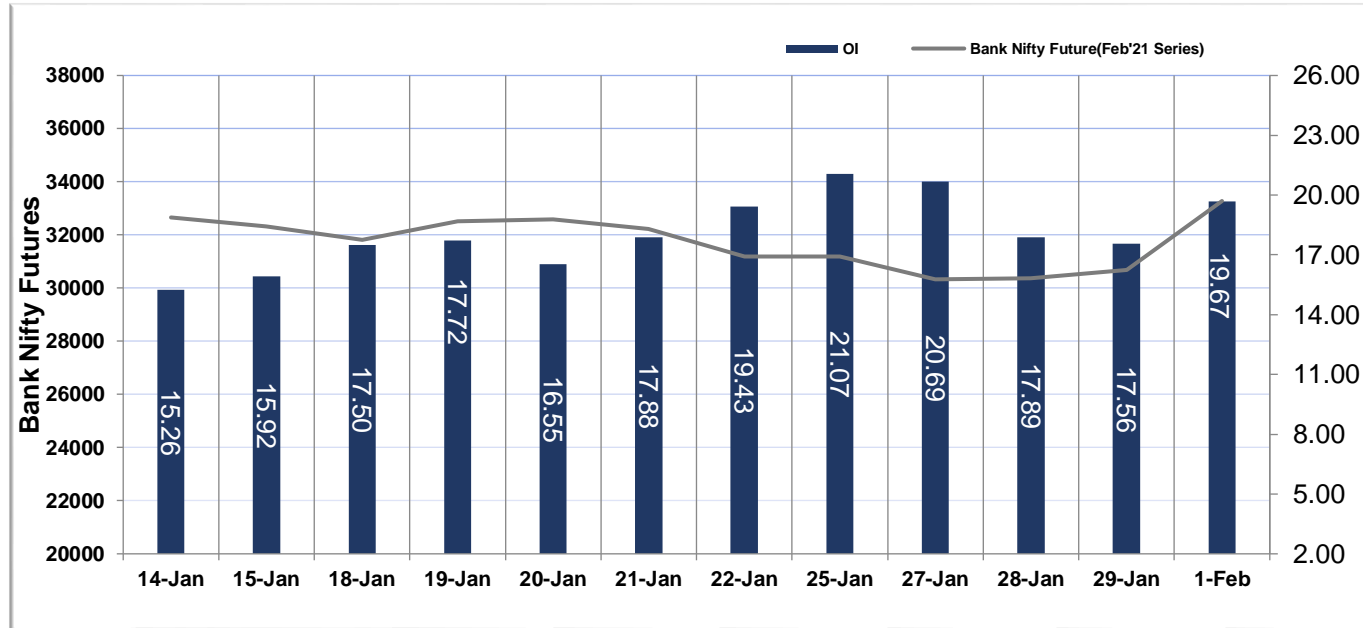


- Nifty Cash prices have settled at 14281.20 up by 4.74 percent from the previous close. On the upper side it has resistance of **14380** and **14450** levels, while lower side it has support of **14150** and **14040** levels. Intraday traders should be cautious and take position accordingly.

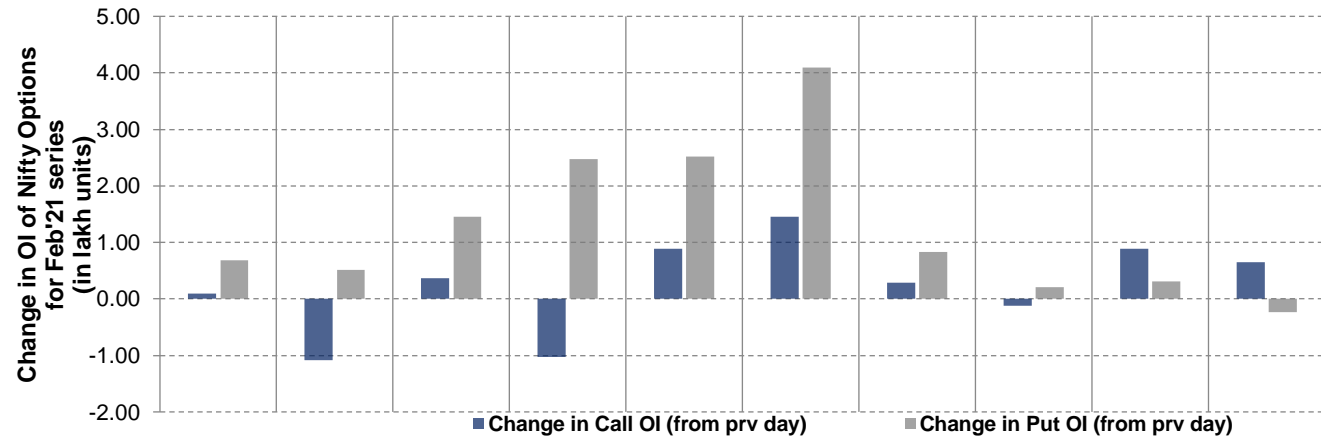
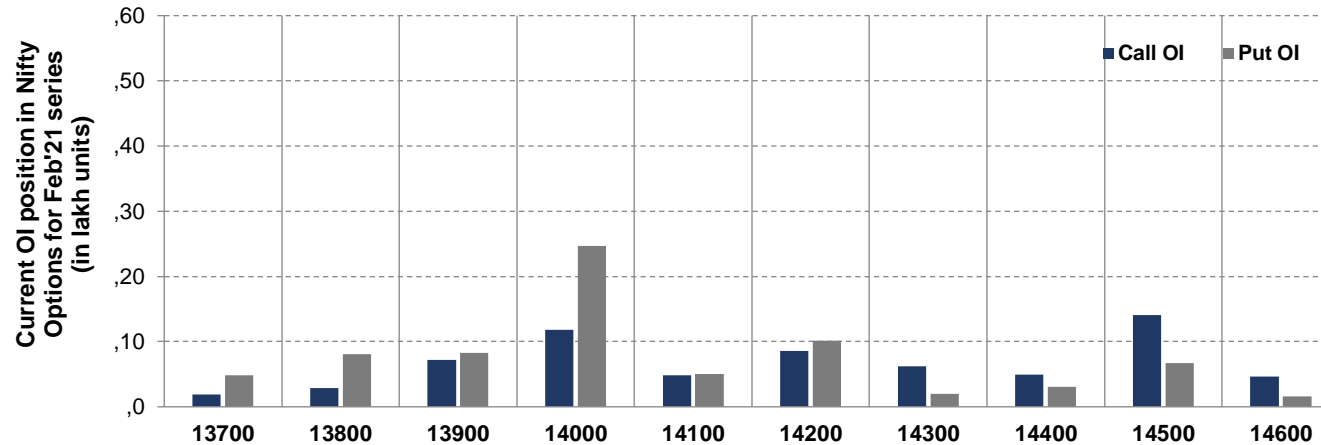
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,500 SP from the Feb month expiry was the most active call with an addition of 0.09 million in open interests.
- Among Nifty puts 14,000 SP from the Feb month expiry was the most active put with an addition of 0.25 million in open interests.
- The maximum OI outstanding for Calls was at 14,500 SP (1.41mn) and that for Puts was at 14,000 SP (2.50mn)

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