

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended at fresh closing highs on Monday. The start of the day was on strong note, taking support with Expenditure Secretary T V Somanathan's statement that the government is confident of lowering the fiscal deficit to 4.5 per cent of GDP by 2025-26 fiscal, considering a nominal GDP growth of 10 per cent every year. Traders took note of report that foreign portfolio investors (FPIs) remained net buyers to the tune of Rs 12,266 crore in the Indian market in the first five trading sessions of February, as positive sentiment post-Union Budget 2021 sparked a rally in investment.

Domestic sentiments remained up-beat with Economic Affairs Secretary Tarun Bajaj's statement that the government is sticking to the target of becoming a \$5 trillion economy by 2024-25 and emphasis on infrastructure sector and other initiatives taken in Budget 2021-22 are aimed at achieving the goal. Some support also came with Union Minister Nitin Gadkari's statement that the government aims to increase the MSME sector's share in the GDP to 40 percent to benefit the rural poor. Currently, around 6.5 crores micro, small and medium enterprises (MSMEs) contribute 30 per cent to the GDP.

Key indices maintained their gaining rally for the whole trading session, after the Reserve Bank of India (RBI) has decided to conduct purchase of Government securities under Open Market Operations (OMO) for an aggregate amount of Rs 20,000 crore on February 10, 2021. Traders remained positive, after Finance Minister Nirmala Sitharaman said the government will work with the Reserve Bank for execution of the bank privatisation plan announced in the budget. She also said that the government has no plan to form any bank investment company to house the government stakes in banks.

On the global front, European markets were trading higher with markets tracking positive sentiment in Asia and the U.S. Asian markets ended mostly higher on Monday, even after a measure of the public assessment of the Japanese economy decreased for the third month in a row in January. The survey data from the Cabinet Office showed that the current conditions index of the Economy Watchers' Survey, which measures the current situation of the economy, decreased to 31.2 in January from 34.3 in December. However, a reading below 50 suggests pessimism.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51348.77	617.14	1.22
NIFTY	15115.80	191.55	1.28
MIDCAP	19705.30	292.13	1.50
SMLCAP	19388.71	292.65	1.53
BSEFMC	12707.20	-67.36	-0.53
AUTO	24972.33	744.42	3.07
POWER	2258.80	28.70	1.29
REALTY	2767.45	53.98	1.99
BSE IT	25975.15	504.23	1.98
BANKEX	40661.42	359.61	0.89
OIL GAS	14851.14	232.58	1.59
METAL	12696.98	369.87	3.00
INDIA VIX	23.95	0.54	2.31

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1174	791	89
BSE	1721	1313	193

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5576	6544	(15)
NSE CASH	95437	90422	6
NSE F&O	2508350	8455619	(70)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	42.00	4.28	1.05
SENSEX	35.61	3.46	0.80

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

FII-DII*	Buy	Sell	Net
DII	5356	5861	(505)
FII	8018	6141	1877

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4203.93	3713.36	491
Index Options	302480.81	305340.90	(2860)
Stock Futures	12838.97	11930.43	909
Stock Options	13853.46	13749.60	104

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.52	1.41
BANK NIFTY	1.03	1.19

## SECURITIES BAN FOR TRADE IN F&O FOR 09-02-2021

BHEL
SAIL
SUN TV

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.044	6.071	-0.44
USA	1.190	1.170	1.67

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.93	91.00	-0.07

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	73.10	0.03	0.04
24-Feb-21 EUR-INR	87.99	0.45	0.51
24-Feb-21 GBP-INR	100.06	0.13	0.13
24-Feb-21 JPY- INR	69.26	0.04	0.05

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1837.68	23.90	1.32
Silver	27.44	0.56	2.06
Crude-Oil	57.80	0.95	1.67
Brent-Crude	60.28	0.94	1.58

## INDEX TREND ANALYSIS

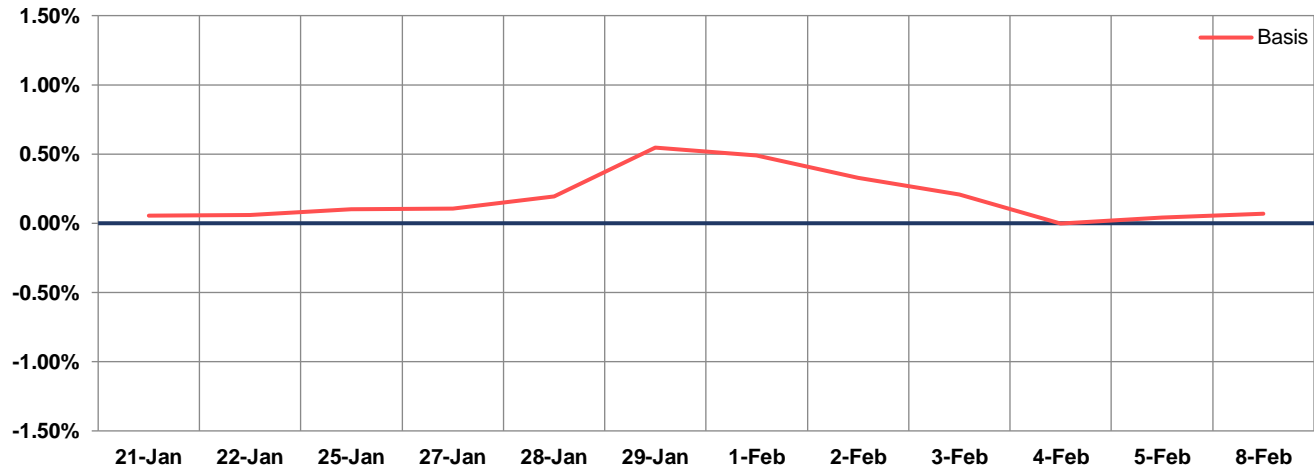
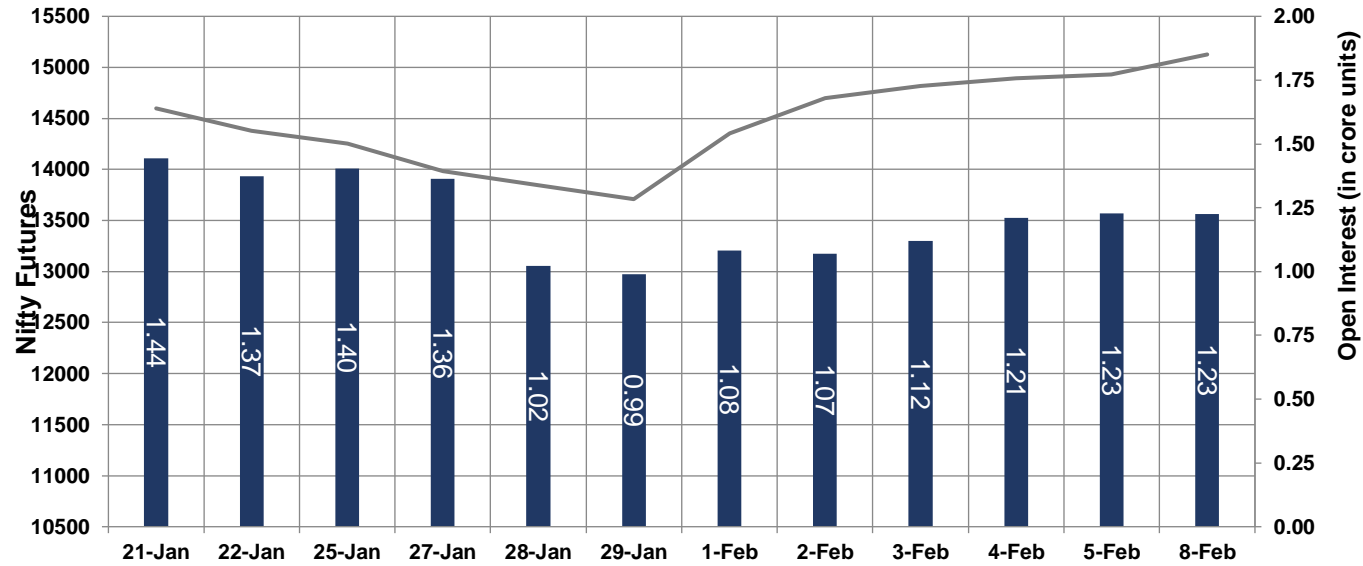
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15116	14987	15051	15106	15170	15224	Buy	Buy	Buy
SENSEX	51349	50963	51156	51340	51532	51716	Buy	Buy	Buy
NIFTY FUTURES	15140	14977	15058	15113	15194	15249	Buy	Buy	Buy
BANK NIFTY	35984	35513	35748	36107	36343	36702	Buy	Buy	Buy
CNX IT	25916	25175	25545	25786	26157	26399	Buy	Buy	Buy
CNX MIDCAP	22765	22530	22647	22732	22849	22933	Buy	Buy	Buy
CNX SMALLCAP	7753	7670	7712	7745	7787	7820	Buy	Buy	Buy
INDIA VIX	23.96	21.33	22.64	23.49	24.81	25.66	Buy	Neutral	Buy

## NIFTY TECHNICAL & INDICES LEVEL

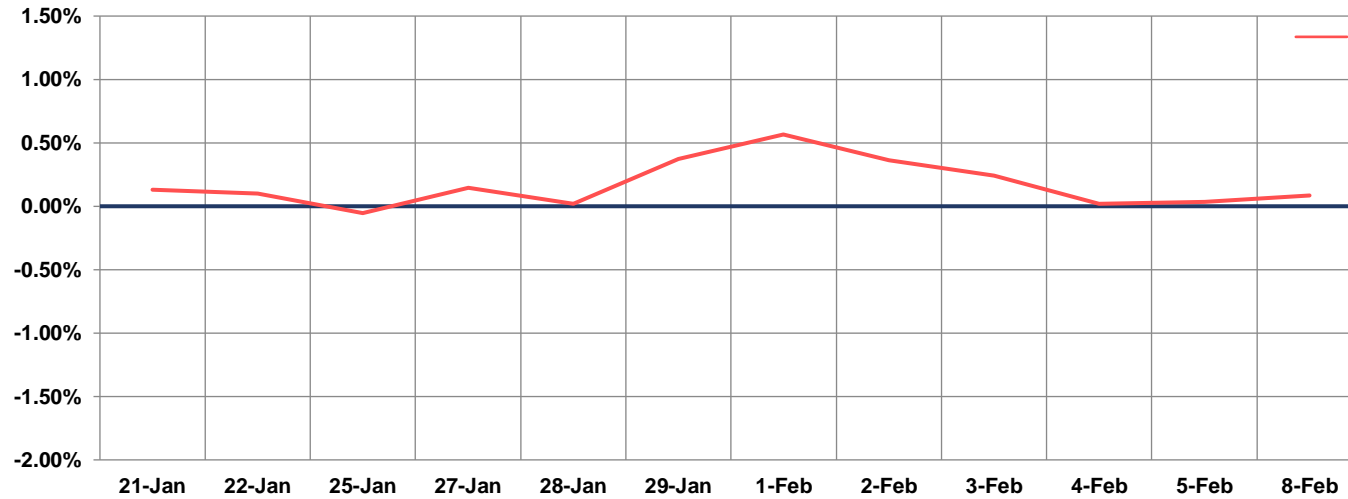
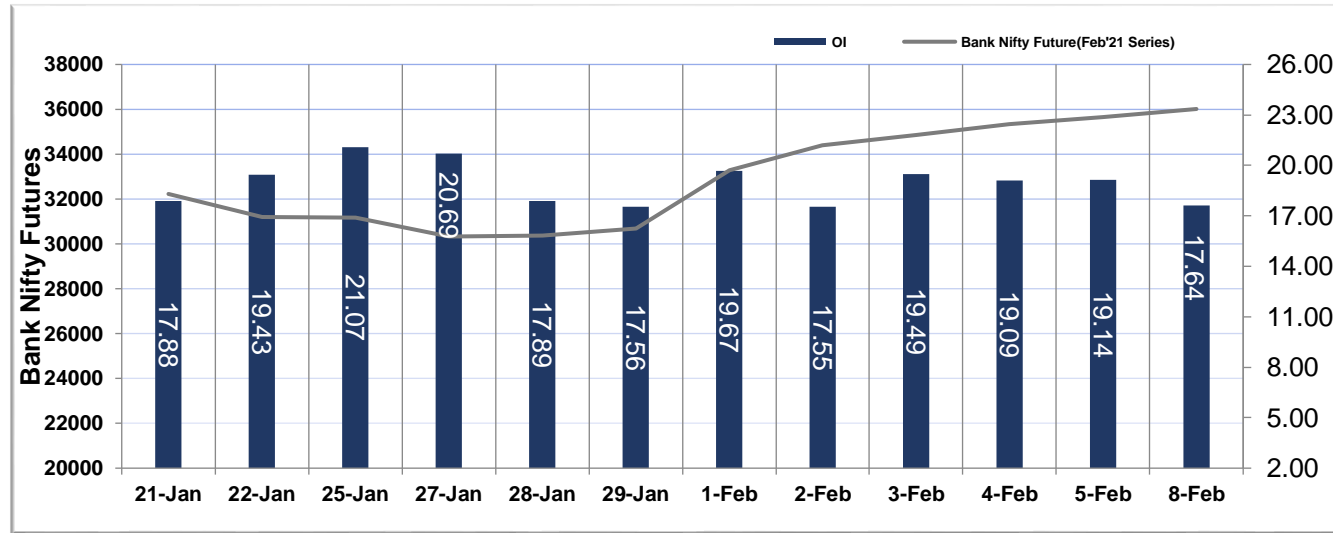


➤ Nifty Cash prices have settled at 15115.80 up by 1.28 percent from the previous close. On the upper side it has resistance of **15193** and **15230** levels, while lower side it has support of **15040** and **14970** levels. Intraday traders should be cautious and take position accordingly.

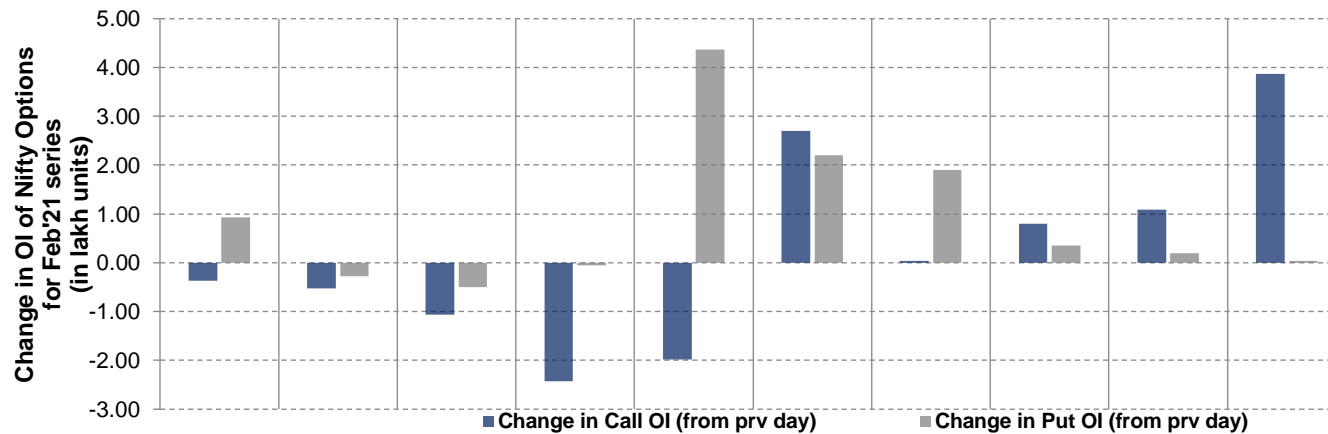
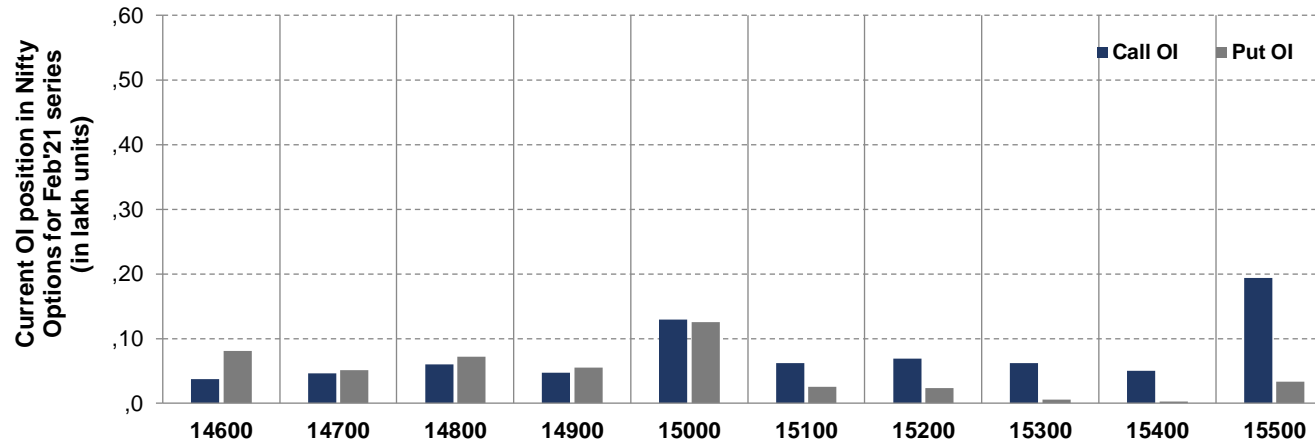
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the Feb month expiry was the most active call with an addition of 0.40 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.44 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.94mn) and that for Puts was at 15,000 SP (1.25mn)



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