

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended flat with a negative bias on Tuesday. Indices made a positive start, taking support with Finance Minister Nirmala Sitharaman's statement that the government is taking steps to carefully monitor the fiscal deficit, which is estimated at 9.5 percent of the Gross domestic product (GDP) for the current financial year. She said the 'mool mantra' now is that fiscal deficit is something that one cannot escape, but at the same time, it needs to be carefully tackled. Some support came with a report that US President Joe Biden and Prime Minister Narendra Modi have agreed to work together on the fight against the COVID-19 pandemic, renew partnership on climate change, rebuild the global economy in a way that benefits the people of both countries and stand together against the scourge of global terrorism.

Markets added more gains in afternoon deals and remained higher for the most part of the trading session, as sentiments remained positive with the European Union stating that its first high-level dialogue on trade with India saw interest by both sides in resuming negotiations for an ambitious, comprehensive and mutually beneficial trade and investment pact once their respective approaches and positions are 'close enough'. Adding more comfort, private report stated that India will make up the biggest share of energy demand growth at 25 percent over the next two decades, as it overtakes the European Union as the world's third-biggest energy consumer by 2030.

On the global front, European markets were trading mostly in green bucking a positive trend seen in Asia and the US at the start of the trading week. Asian markets ended mostly higher on Tuesday, after Malaysia's industrial production recovered in December and unemployment rate rose marginally. The data from the Department of Statistics showed that industrial production accelerated 1.7 percent year-on-year in December, after a 2.2 percent decrease in November. The growth in production was mainly driven by a rise in production of manufacturing industry.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51329.08	-19.69	-0.04
NIFTY	15109.30	-6.50	-0.04
MIDCAP	19669.91	-35.39	-0.18
SMLCAP	19338.77	-49.94	-0.26
BSEFMC	12623.37	-83.83	-0.66
AUTO	24615.55	-356.78	-1.43
POWER	2249.37	-9.43	-0.42
REALTY	2747.57	-19.88	-0.72
BSE IT	25838.28	-136.87	-0.53
BANKEK	40724.81	63.39	0.16
OIL GAS	14793.04	-58.10	-0.39
METAL	12618.99	-77.99	-0.61
INDIA VIX	24.27	0.31	1.29

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	801	1149	82
BSE	1305	1661	192

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6506	5405	20
NSE CASH	82189	77161	7
NSE F&O	3413814	2496737	37

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.97	4.28	1.05
SENSEX	35.61	3.46	0.80

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4650	6406	(1756)
FII	11600	10299	1301

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3971.10	3600.36	371
Index Options	391956.27	392448.25	(492)
Stock Futures	13204.56	13166.22	38
Stock Options	14402.33	14555.41	(153)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.38	1.52
BANK NIFTY	1.05	1.03

SECURITIES BAN FOR TRADE IN F&O FOR 10-02-2021

BHEL
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.075	6.040	0.58
USA	1.152	1.160	-0.72

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.56	90.93	-0.41

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	73.02	-0.07	-0.09
24-Feb-21 EUR-INR	88.37	0.38	0.43
24-Feb-21 GBP-INR	100.51	0.44	0.44
24-Feb-21 JPY- INR	69.75	0.49	0.70

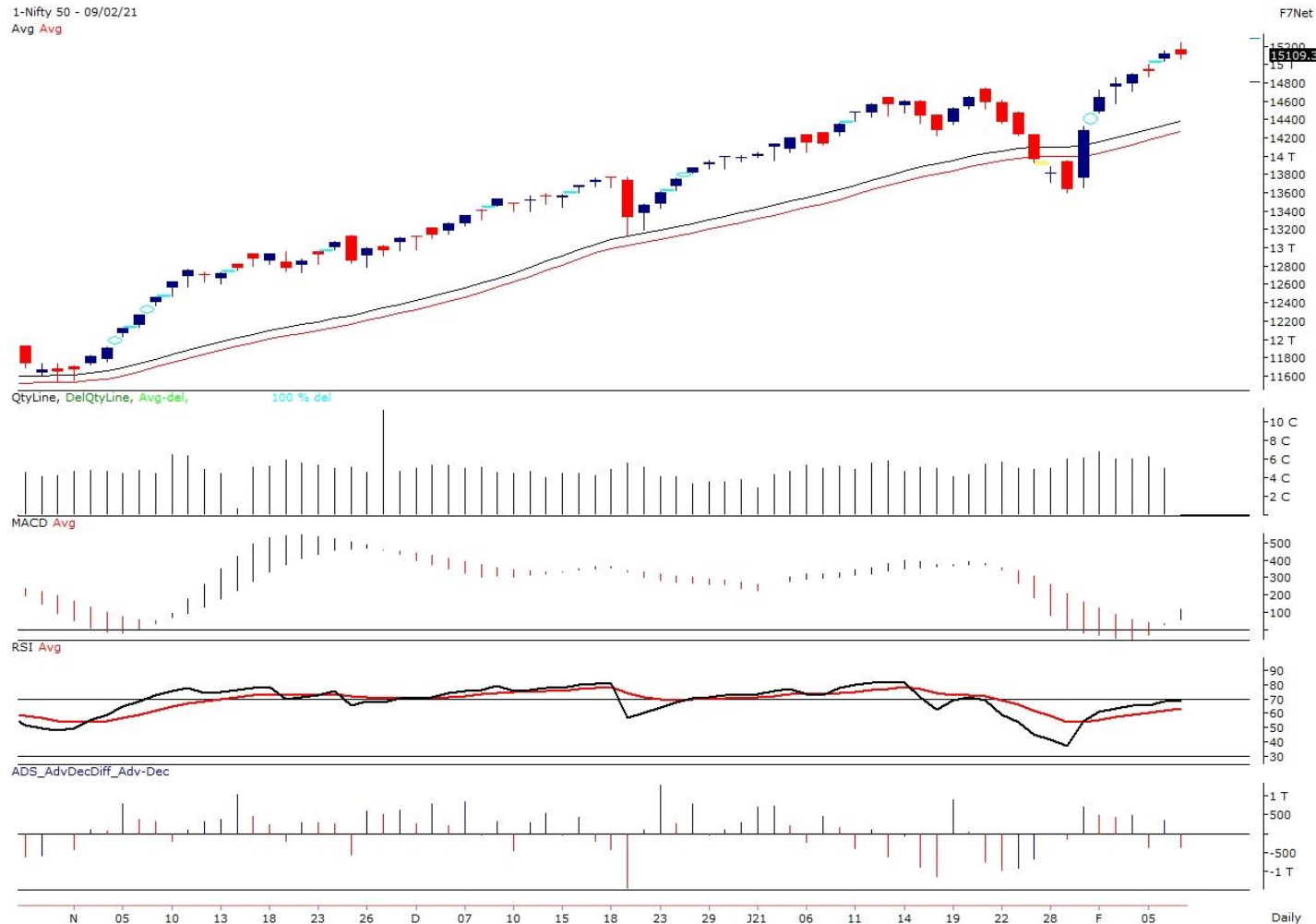
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1835.51	4.93	0.28
Silver	27.29	0.03	0.11
Crude-Oil	58.11	0.14	0.24
Brent-Crude	60.92	0.36	0.59

INDEX TREND ANALYSIS

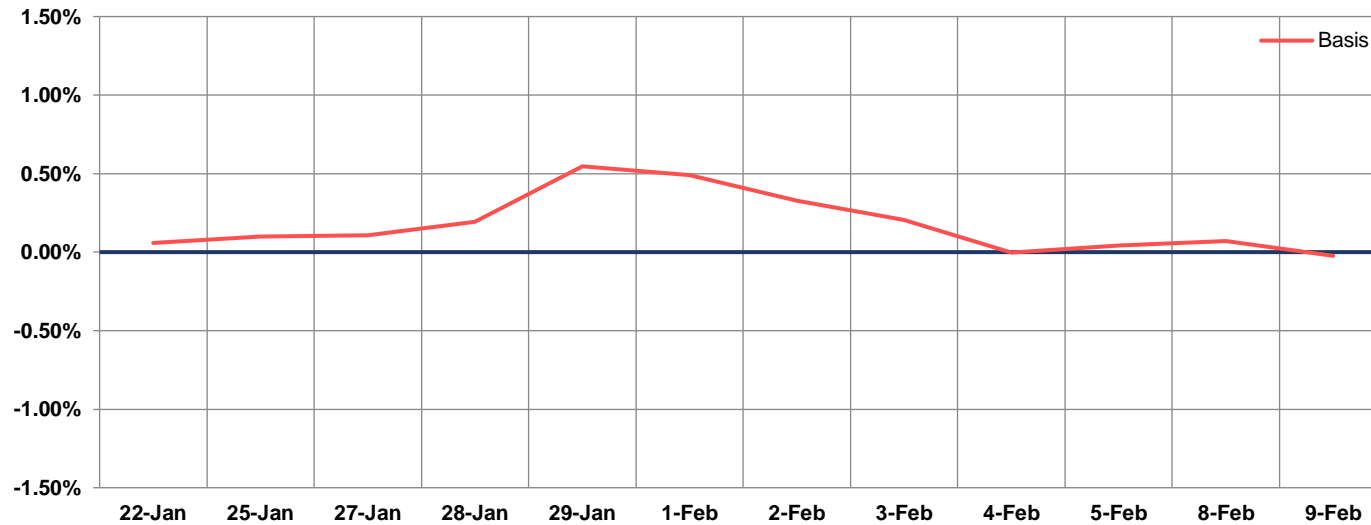
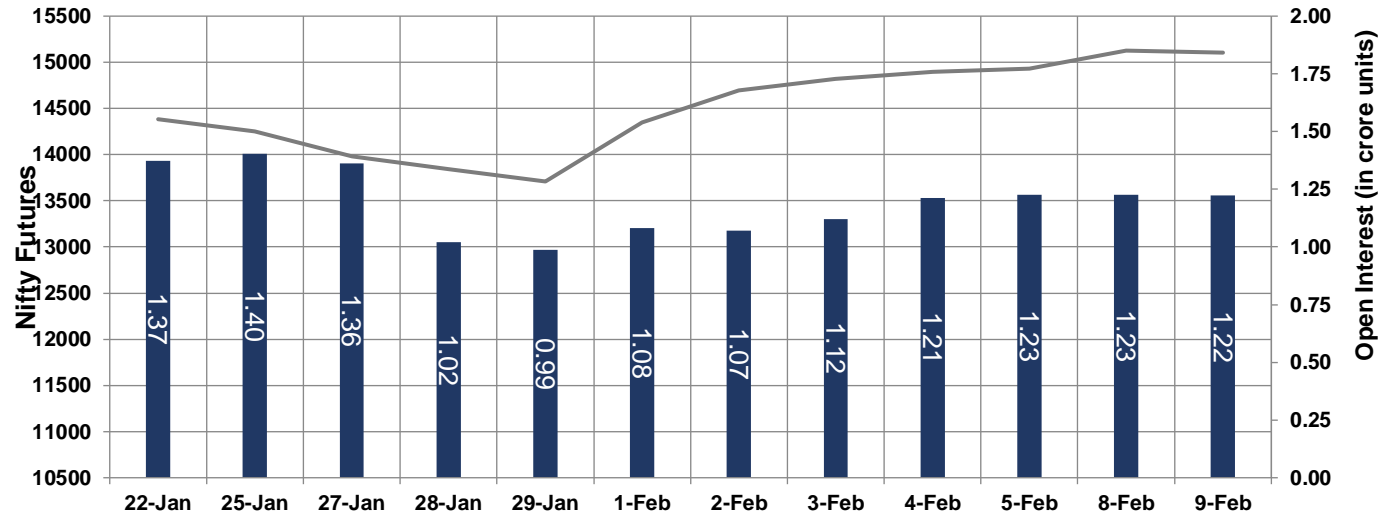
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15109	14951	15030	15144	15223	15336	Buy	Buy	Buy
SENSEX	51329	50811	51070	51453	51712	52095	Buy	Buy	Buy
NIFTY FUTURES	15105	14941	15023	15144	15226	15348	Buy	Buy	Buy
BANK NIFTY	36056	35216	35636	36057	36477	36897	Buy	Buy	Buy
CNX IT	25779	25272	25526	25913	26167	26555	Buy	Buy	Buy
CNX MIDCAP	22747	22507	22627	22776	22896	23046	Buy	Buy	Buy
CNX SMALLCAP	7717	7632	7675	7737	7780	7843	Buy	Buy	Buy
INDIA VIX	24.27	20.36	22.31	23.39	25.35	26.43	Buy	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

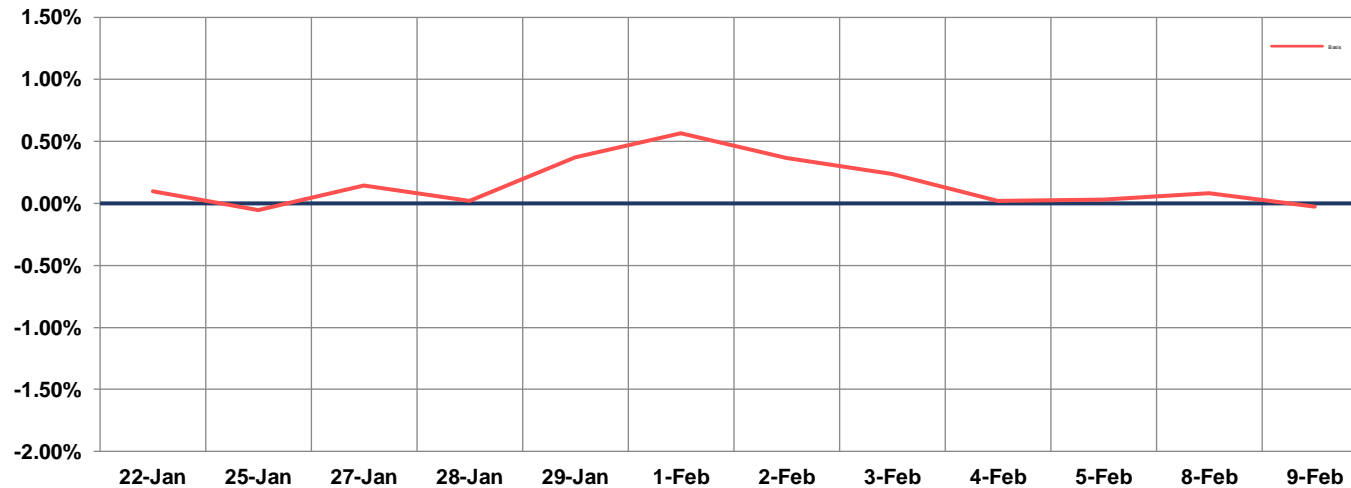
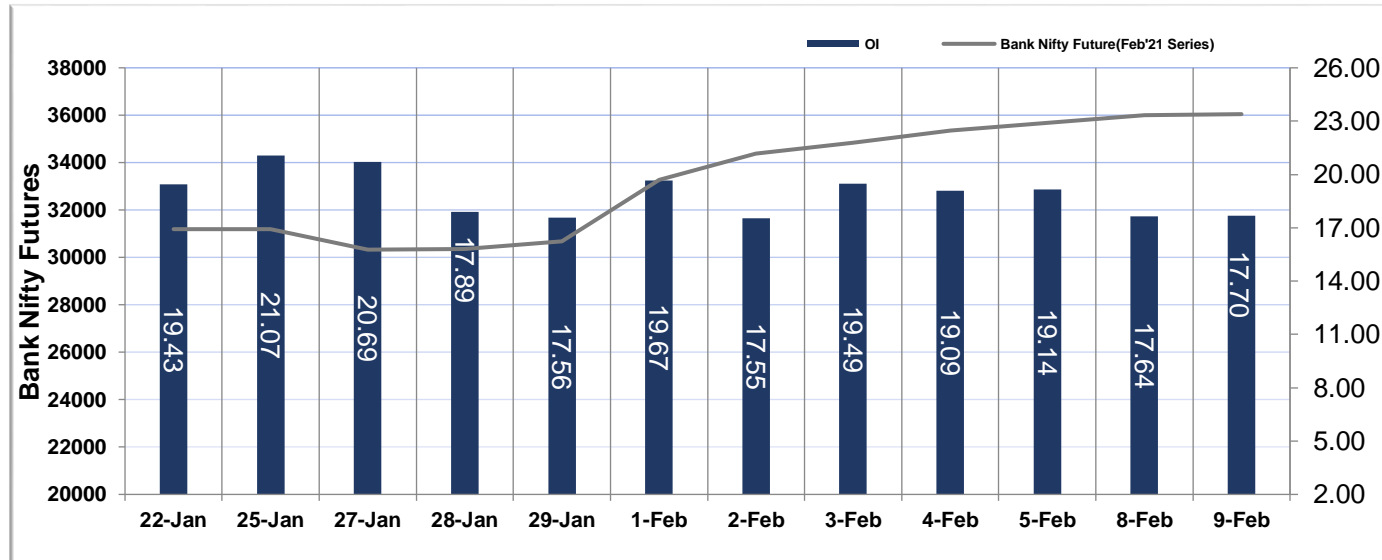


- Nifty Cash prices have settled at 15109.30 marginally down by 0.04 percent from the previous close. On the upper side it has resistance of **15193** and **15230** levels, while lower side it has support of **15040** and **14970** levels. Intraday traders should be cautious and take position accordingly.

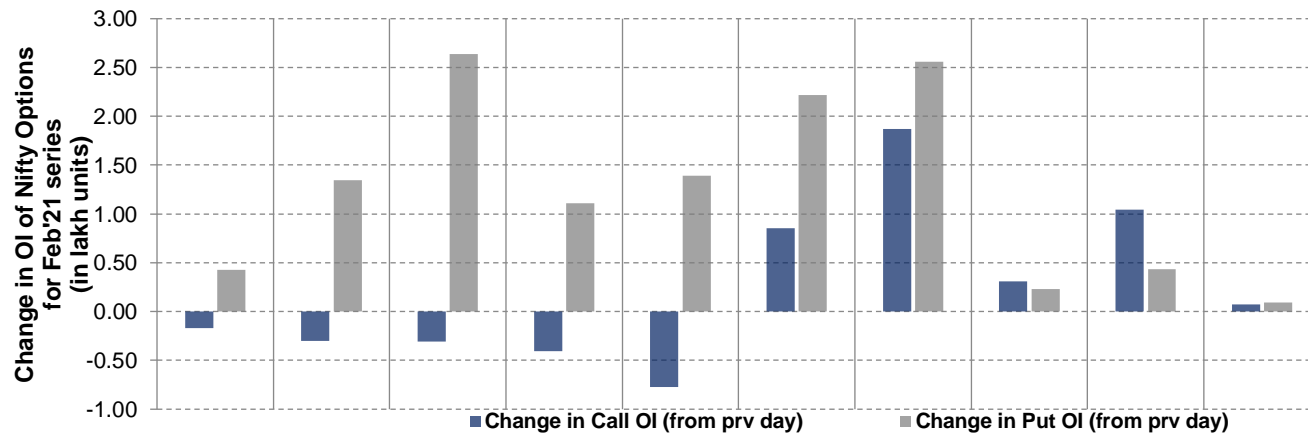
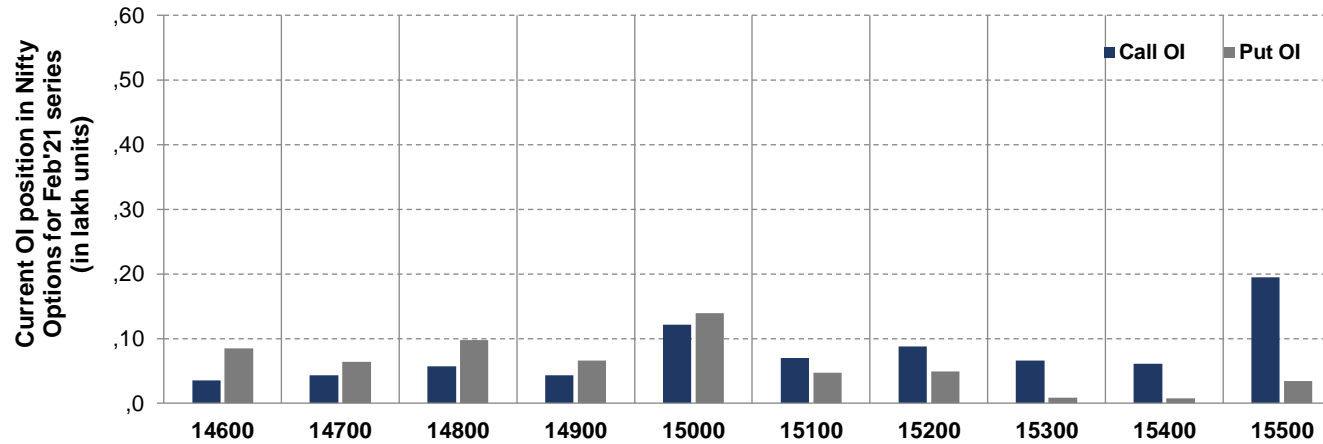
NIFTY FUTURES



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 0.01 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.14 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.95mn) and that for Puts was at 15,000 SP (1.39mn)

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